


# Study Notes for "The Advantage"

By Patrick Lencioni

| Chapter 1: The Case for Organizational Health                             |   |
|---|---|
| Organizational Health   | <ul style="list-style-type: none"> <li>• <i>Organizational Health</i> is about integrity, which is defined as being whole, consistent &amp; complete               <ul style="list-style-type: none"> <li>◦ When management, operations, strategy and culture fit together</li> <li>◦ The single greatest advantage any company can achieve</li> </ul> </li> <li>• Successful organizations are both Smart &amp; Healthy               <ul style="list-style-type: none"> <li>◦ <i>Smart</i> = Strategy, Marketing, Finance, Technology</li> <li>◦ <i>Healthy</i> = Minimal Politics &amp; Confusion, High Morale, High Productivity, Low Turnover</li> </ul> </li> <li>• Leaders focus more on "smart" because it is objective and an area where they are comfortable</li> <li>• Being smart is a commodity (permission to play), and offers little sustainable advantage</li> <li>• Healthy organizations will naturally get smarter over time; smart organizations will not get healthy</li> </ul> |
| Why is organizational health overlooked by leaders?                       | <ul style="list-style-type: none"> <li>• <i>The Sophistication Bias</i> – organizational health seems too simple to be an opportunity</li> <li>• <i>The Adrenaline Bias</i> – organizational health is not exciting enough to focus on</li> <li>• <i>The Quantification Bias</i> – organizational health is difficult to quantify and measure results</li> </ul>  |
| Why is organizational health overlooked in literature? (media & academia) | <ul style="list-style-type: none"> <li>• Not sexy</li> <li>• Can't be measured</li> <li>• Too basic – leadership, teamwork, culture, strategy, meetings are looked at as too basic and evaluated individually vs. integrating them into the whole</li> </ul>  |
| Chapter 2: The Four Disciplines Model                                     |   |
| The Four Discipline Model   | <ul style="list-style-type: none"> <li>• Discipline 1: Build a Cohesive Team</li> <li>• Discipline 2: Create Clarity</li> <li>• Discipline 3: Overcommunicate Clarity</li> <li>• Discipline 4: Reinforce Clarity</li> </ul>   |
| Discipline 1: Build a Cohesive Team                                       | <ul style="list-style-type: none"> <li>• Behavior 1: Build Trust</li> <li>• Behavior 2: Mastering Conflict</li> <li>• Behavior 3: Achieving Commitment</li> <li>• Behavior 4: Embracing Accountability</li> <li>• Behavior 5: Focusing on Results</li> </ul>    |
| Discipline 2: Create Clarity  | <ul style="list-style-type: none"> <li>• Question 1: Why do we exist?</li> <li>• Question 2: How do we behave?</li> <li>• Question 3: What do we do?</li> <li>• Question 4: How will we succeed?</li> <li>• Question 5: What is most important right now?</li> <li>• Question 6: Who must do what?</li> </ul>   |
| Discipline 3: Overcommunicate Clarity                                     | <ul style="list-style-type: none"> <li>• Cascading Communication</li> <li>• Top Down Communication</li> <li>• Upward &amp; Lateral Communication</li> </ul>   |
| Discipline 4: Reinforce Clarity   | <ul style="list-style-type: none"> <li>• Recruiting &amp; Hiring</li> <li>• Orientation</li> <li>• Performance Management</li> <li>• Compensation &amp; Rewards</li> <li>• Recognition</li> <li>• Firing</li> </ul>   |
| Chapter 3: Discipline 1 – Build a Cohesive Leadership Team                |   |
| Defining a Leadership Team  | <ul style="list-style-type: none"> <li>• "A leadership team is a <i>small group of people</i> who are <i>collectively responsible</i> for achieving a <i>common objective</i> for their organization"</li> <li>• Becoming a team requires an intentional decision on the part of each team member               <ul style="list-style-type: none"> <li>◦ A working group is like a golf team, where individual players add their scores to the team total</li> <li>◦ A team is like a basketball team that plays simultaneously, interactively &amp; dependently</li> </ul> </li> </ul>   |
| "Small group of People"   | <ul style="list-style-type: none"> <li>• 3 - 10 people</li> <li>• Teams need to be small enough to communicate via both advocacy and inquiry               <ul style="list-style-type: none"> <li>◦ <i>Advocacy</i>: Stating your case &amp; making your point</li> <li>◦ <i>Inquiry</i>: Asking questions to seek clarity about another person's advocacy</li> </ul> </li> <li>• When teams are too large, team members focus only on advocacy since they get less "air time"</li> <li>• Leadership teams can get too large trying to be inclusive of all leaders (Noah's Ark Leadership)</li> </ul>   |
| "Collectively Responsible"  | <ul style="list-style-type: none"> <li>• Collective responsibility requires selflessness and shared sacrifices from team members</li> <li>• Requires tangible (e.g. budget, head count, etc.) and non-tangible sacrifice (e.g. time, emotion)               <ul style="list-style-type: none"> <li>◦ Cohesive teams work together on topics outside of their direct responsibility</li> </ul> </li> </ul>   |

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| <p>“Common Objective”</p>  | <ul style="list-style-type: none"> <li>• Team members must see their goals as collective and shared when it comes to managing the top priorities of the greater organization</li> </ul>   |
| <p>Behavior 1: Building Trust</p>                                      | <ul style="list-style-type: none"> <li>• Building trust is the foundation of an effective leadership team</li> <li>• <i>Vulnerability Based Trust</i> – Team members must be comfortable being transparent &amp; honest             <ul style="list-style-type: none"> <li>◦ Must abandon pride, ego for the collective good of the team</li> <li>◦ Can state things like “I need help”, “I screwed up”, and “your idea is better than mine”</li> </ul> </li> <li>• A team cannot become too vulnerable (but use appropriate judgment &amp; common sense)</li> <li>• <i>Fundamental Attribution Error</i> - attributing the negative aspects of a colleague’s behavior to intentions &amp; personality, while attributing negative aspects of behavior to environmental factors</li> <li>• <i>Tools to Build Trust:</i> <ul style="list-style-type: none"> <li>◦ One exercise to build trust is to have team members share a few things about their lives</li> <li>◦ Another method is behavioral profiling, for example: Myers Briggs</li> <li>◦ Leaders must lead by example and go first in these exercises</li> </ul> </li> </ul>   |
| <p>Behavior 2: Mastering Conflict</p>                                  | <ul style="list-style-type: none"> <li>• Trust allows teams to engage in healthy conflict (fear of conflict is a sign of problems)             <ul style="list-style-type: none"> <li>◦ With Trust, conflict becomes nothing but the pursuit of truth in order to find the best answer</li> <li>◦ Without Trust, conflict becomes politics and manipulating others to win an argument</li> </ul> </li> <li>• Conflict can be uncomfortable, but “no pain, no gain” – must be willing to push the limit a bit</li> <li>• Leaders who avoid conflict transfer problems to others, who must ultimately resolve the issue</li> <li>• <i>Conflict Continuum</i> – the ideal point of conflict is just to the left of the boundary below</li> </ul> <div style="text-align: center; margin: 10px 0;"> <p style="font-size: small; margin: 0;">             Artificial Harmony      Constructive Conflict      <span style="border: 1px dashed yellow; border-radius: 50%; padding: 2px;">★</span>      Destructive Conflict      Mean Spirited Attacks           </p> <p style="font-size: x-small; margin: 0;">             At times, variation around the ideal point allows conflict to go a bit too far           </p> </div> <ul style="list-style-type: none"> <li>• <i>Tools to Master Conflict</i> <ul style="list-style-type: none"> <li>◦ Mining for conflict during meetings</li> <li>◦ Real-time Permission = real-time positive re-enforcement to applaud constructive conflict</li> </ul> </li> </ul> |
| <p>Behavior 3: Achieving Commitment</p>                                | <ul style="list-style-type: none"> <li>• Conflict allows a team to achieve commitment             <ul style="list-style-type: none"> <li>◦ “If people don’t weigh in, they can’t buy in” - “Disagree &amp; commit”</li> </ul> </li> <li>• Only when colleagues speak up and put their opinions on the table can a leader confidently fulfill one of their most important responsibilities – breaking ties that occur in different opinions</li> <li>• At the end of a meeting, cohesive teams must take the time to ensure everyone has the same understanding of what the team just committed to do (and what to communicate to others)</li> </ul>   |
| <p>Behavior 4: Embracing Accountability</p>                            | <ul style="list-style-type: none"> <li>• Achieving commitment allows teams to hold each other accountable</li> <li>• Peer-to-peer accountability is the most effective – always going to the leader creates politics</li> <li>• Leaders can only develop peer-to-peer accountability by setting the example and holding employees accountable for behavior issues (short of simply firing them)             <ul style="list-style-type: none"> <li>◦ Confronting someone about behavior is difficult because it is more subjective</li> <li>◦ On cohesive teams, minor behavioral issues are addressed in public so everyone: 1) gets the same message, 2) sees the example, and 3) has the accountability culture re-enforced</li> </ul> </li> <li>• Team Effectiveness Exercise             <ul style="list-style-type: none"> <li>◦ Each team member writes one item others do to make the team better and one item that sometimes hurts the team.</li> <li>◦ Starting with the leader as the recipient, each team member provides the positive feedback (the leader is then allowed a one sentence response to acknowledge the feedback).</li> <li>◦ Each team provides then provides constructive feedback (and a one sentence response)</li> </ul> </li> </ul>  |
| <p>Behavior 5: Focusing on Results</p>                                 | <ul style="list-style-type: none"> <li>• Trust, Conflict, Commitment and Accountability allow teams to focus on results</li> <li>• If an organization rarely achieves results, by definition it does not have a good leadership team</li> <li>• <i>Collective Goals</i> – goals shared across the entire leadership team</li> <li>• <i>Team Number One</i> – the larger organizational goals must take priority over departmental goals</li> </ul>  |
| <p>Checklist for Discipline 1: Building a Cohesive Leadership Team</p> | <p>A leadership team can be confident that they’ve mastered this discipline when they:</p> <ul style="list-style-type: none"> <li>• Have a team that is small enough to be effective (3-10 people)</li> <li>• Trust and can be truly vulnerable with each other</li> <li>• Regularly engage in productive, unfiltered conflict around important issues</li> <li>• Leave meetings with clear-cut, active and specific agreements around decisions</li> <li>• Hold one another accountable to commitments and behaviors</li> <li>• Focus on “team number one”, meaning that collective priorities trump department objectives</li> </ul>  |



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| Chapter 4: Discipline 2 – Build a Cohesive Leadership Team |   |
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| Creating Clarity   | <ul style="list-style-type: none"> <li>• Clarity is achieving alignment and ensuring clear consistent messages to subordinates so that there is little room for confusion, disorder, and infighting</li> <li>• Leaders at the top often underestimate the impact of even subtle misalignment on subordinates</li> <li>• Creating clarity requires: 1) Cohesion at the top, 2) Avoiding jargon, 3) Time (days not months)               <ul style="list-style-type: none"> <li>◦ Do not wait for perfection – take time to create good answers to the 6 questions and execute</li> </ul> </li> <li>• <i>Playbook</i> – an effective way to keep decisions alive is to document the answers to the six questions (below) in a 1-2 page playbook that team members carry with them at all times</li> </ul>   |
| Question 1: Why do we exist?                               | <ul style="list-style-type: none"> <li>• The underlying reason for being an organization – its purpose – must be <u>completely idealistic</u></li> <li>• Two problems arise if the underlying purpose of the organization is not identified:               <ul style="list-style-type: none"> <li>◦ Teams do not achieve a real sense of commitment</li> <li>◦ Decisions are not made with an understanding of the implications on the organization</li> </ul> </li> <li>• Critical factors in finding an organizations reason for existence               <ul style="list-style-type: none"> <li>◦ Answering this question is the simply start of the clarity process (not the end)</li> <li>◦ The reason for existence must be true (not fabricated)</li> <li>◦ The purpose for identifying the reason is internal – it is not for marketing – not a differentiator</li> </ul> </li> <li>• The process starts by asking, “How do we contribute to a better world”               <ul style="list-style-type: none"> <li>◦ The answer is the refined by continually asking “why” until the most idealistic reason is found</li> <li>◦ The final answer is idealistic - just shy of “to make the world a better place”</li> </ul> </li> <li>• Why do we exist categories:               <ul style="list-style-type: none"> <li>◦ <i>Customers</i>: To serve the needs of customers (e.g. Nordstrom)</li> <li>◦ <i>Industry</i>: Existing for the love of the industry (e.g. hotels, ranching)</li> <li>◦ <i>Greater Cause</i>: Something connected to what it does (e.g. Southwest = allowing all to fly)</li> <li>◦ <i>Community</i>: Making a specific geographic place better (e.g. a youth club, civic organization)</li> <li>◦ <i>Employees</i>: Providing better opportunities for the employees</li> <li>◦ <i>Wealth</i>: To provide wealth for the owners</li> </ul> </li> </ul> |
| Question 2: How do we behave?                              | <ul style="list-style-type: none"> <li>• How an organization behaves is embodied in core values – what is done and what is not tolerated               <ul style="list-style-type: none"> <li>◦ Companies that adhere to core values will attract the right people and repel the wrong</li> <li>◦ Do not try to be all things to all people – creating too many core values causes confusion</li> </ul> </li> <li>• Different kinds of values               <ul style="list-style-type: none"> <li>◦ <i>Core</i> – two to three traits that are inherent in an organization and do not change over time</li> <li>◦ <i>Aspirational</i> – traits that an organization wishes it had and believes it must develop</li> <li>◦ <i>Permission to Play</i> – traits that are the minimum behavioral standards required in an org</li> <li>◦ <i>Accidental</i> – traits that came about unintentionally and aren’t necessarily good</li> </ul> </li> <li>• Determining core values               <ul style="list-style-type: none"> <li>◦ Core values are traits that are natural and apparent in the organization for a long time</li> <li>◦ Identify employees who embody what is best about the company</li> <li>◦ Identify employees who were talented, but not a good fit for the company</li> <li>◦ Name the core value – try to find a simple, unique, descriptive name (“floor sweeper”)</li> <li>◦ Be honest about whether the current leadership team embodies the core value</li> </ul> </li> </ul>   |
| Question 3: What do we do?                                 | <ul style="list-style-type: none"> <li>• A simple, non-idealistic description of what the organization actually does               <ul style="list-style-type: none"> <li>◦ This question should take the least amount of time to answer</li> <li>◦ The answer should not be crafted for marketing material – keep it basic</li> <li>◦ The answer can change over time, but only when there is a significant need to shift</li> </ul> </li> <li>• Examples:               <ul style="list-style-type: none"> <li>◦ <i>Utility</i>: “Generate and deliver electrical and natural gas products and services for the state”</li> <li>◦ <i>Credit Card</i>: “Provide payment products and extend credit to consumers”</li> <li>◦ <i>Medical</i>: “Discover, develop, make &amp; commercialize better medicines thru integrated science”</li> <li>◦ <i>Church</i>: “Provide sacraments, outreach services, counseling &amp; religious education for parish”</li> </ul> </li> </ul>   |
| Question 4: How will we succeed?                           | <ul style="list-style-type: none"> <li>• Answering the question, “How we will succeed” essentially determines the organizational strategy               <ul style="list-style-type: none"> <li>◦ <i>Organizational Strategy</i>: Intentional decisions that differentiate the company from competitors</li> <li>◦ <i>Strategic Anchors</i>: To make the strategy practical, identify 3 strategic anchors that inform all decisions and answer the question, “how will we succeed”</li> </ul> </li> <li>• Identifying Strategic Anchors – use a reverse engineering approach               <ul style="list-style-type: none"> <li>◦ Identify an exhaustive list of everything that is true about the organization’s current situation</li> <li>◦ Look for patterns in the list and identify the organization’s strategic direction</li> </ul> </li> <li>• Unlike the core values, the strategy will change when the competitive landscape shifts</li> </ul>  |
| Question 5: What is most important right now?              | <ul style="list-style-type: none"> <li>• To create clarity, every organization must have a single top priority               <ul style="list-style-type: none"> <li>◦ Most organizations have too many top priorities; if everything is important, nothing is</li> <li>◦ Emergency responders avoid politics because they have a single, urgent objective</li> <li>◦ “If we accomplish only one thing during the next X months, it would be...”</li> </ul> </li> <li>• <u><i>Thematic Goal</i></u> – a single unifying rallying cry that answers “what is most important right now”               <ul style="list-style-type: none"> <li>◦ <i>Singular</i>: One thing must be the most important, even if there are other worthy goals</li> <li>◦ <i>Qualitative</i>: Quantifying a goal too early can narrow it and limit the ability to rally around it</li> <li>◦ <i>Temporary</i>: Must be achievable within 3-12 months</li> <li>◦ <i>Shared Across the Leadership Team</i>: Leaders must take collective responsibility for the goal</li> </ul> </li> </ul>   |

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| Question 5: (continued)                                  | <ul style="list-style-type: none"> <li>• <u>Defining Objectives</u> – general categories that further clarify the thematic goal and allow it to be accomplished (must be qualitative, temporary, and shared by the entire team)</li> <li>• <u>Standard Operating Objectives</u> – ongoing and relatively straight forward areas of responsibility that are needed to keep the company afloat (e.g. revenue, expense, on time delivery, etc.)</li> </ul>   |
| Question 6: Who must do what?                            | <ul style="list-style-type: none"> <li>• Although many organizations use conventional department titles (e.g. sales, marketing, finance, engineering), it is often informative to have each team member document their responsibilities             <ul style="list-style-type: none"> <li>◦ Clarifies where there are gaps and duplication</li> <li>◦ The CEO often presents a problem by being too involved in functional activities or past jobs</li> </ul> </li> </ul>  |
| Checklist for Discipline 2: Creating Clarity             | <p>A leadership team can be confident that they've mastered this discipline when they:</p> <ul style="list-style-type: none"> <li>• Know, agree on, and are passionate about the reason the organization exists</li> <li>• Have clarified and embraced a small, specific set of behavioral values</li> <li>• Align on a strategy that defines success and differentiates them from competitors</li> <li>• Have common ownership for one clear, near term goal (3-12 months)</li> <li>• Understand one another's roles and responsibilities</li> <li>• Concisely summarize the elements of organizational clarity and regularly referenced them</li> </ul>   |
| <b>Chapter 5: Discipline 3 – Overcommunicate Clarity</b> |   |
| Overcommunicate Clarity                                  | <ul style="list-style-type: none"> <li>• Employees, as a rule, won't believe what is being communicated until they hear it seven (7) times             <ul style="list-style-type: none"> <li>◦ Leaders sometimes confuse the simple act of communicating information with the ability of others to understand, internalize, and embrace it – repetition is necessary</li> <li>◦ Leaders must become a Chief Reminding Officer – set direction and remind other regularly (even though it may seem overly repetitive, wasteful, and sometimes boring)</li> <li>◦ At the end of a meeting, leaders must review results and decide what to communicate</li> </ul> </li> <li>• <u>Cascading Communications</u> – from senior leadership to each function to each sub-organization             <ul style="list-style-type: none"> <li>◦ Three keys: 1) Consistent message, 2) Timely delivery, 3) Real-time (vs. e-mail)</li> </ul> </li> <li>• <u>Top Down Communication</u> – the most common direction; be consistent, authentic, relevant</li> <li>• <u>Upward and Lateral Communication</u> – upward communication is important, but also not a panacea             <ul style="list-style-type: none"> <li>◦ Leadership is not always a democracy; a cohesive message goes a long way</li> </ul> </li> </ul> |
| Checklist for Discipline 3: Overcommunicate Clarity      | <p>A leadership team can be confident that they've mastered this discipline when they:</p> <ul style="list-style-type: none"> <li>• Clearly communicate the six aspects of clarity (above)</li> <li>• Regularly remind employees about the aspects of clarity</li> <li>• Leave meetings with clear agreement about what to communicate &amp; do it quickly</li> <li>• Know that employees are able to accurately articulate the six aspects of clarity</li> </ul>   |
| <b>Chapter 6: Discipline 4 – Reinforce Clarity</b>       |   |
| Reinforce Clarity  | <ul style="list-style-type: none"> <li>• Leaders must do everything they can to structurally reinforce answers to the six questions             <ul style="list-style-type: none"> <li>◦ Human systems are the tools for reinforcing clarity – the best are simple &amp; least sophisticated</li> <li>◦ Ensure there is not too much structure – “Institutionalize the culture without bureaucratizing it”</li> </ul> </li> </ul>   |
| Recruiting & Hiring                                      | <ul style="list-style-type: none"> <li>• Good hiring helps organizations bring in the right people and keep the wrong ones out,             <ul style="list-style-type: none"> <li>◦ The organization must define right &amp; wrong (see the six questions above)</li> <li>◦ Focus beyond simply technical skills in the interview process</li> <li>◦ There must be some structure to the interview process, but without too much (less is more)</li> <li>◦ The process must be consistent across departments</li> </ul> </li> <li>• The Interview process should be natural and unconventional in order to observe behaviors             <ul style="list-style-type: none"> <li>◦ Classical process = 1) sit behind desk and ask questions about resume, 2) no planning with other interviewers, 3) all interviewers ask the same questions</li> <li>◦ Unconventional process = taking a walk, going shopping, getting a sense of behavioral fit</li> </ul> </li> </ul>  |
| Orientation  | <ul style="list-style-type: none"> <li>• The first days/weeks on the job have a big impact on employees – they shouldn't just be about filling out forms, but should also reinforce the core values and focus on organizational goals</li> </ul>  |
| Performance Management                                   | <ul style="list-style-type: none"> <li>• Performance Management provides employees clarity about what it expected of them, and regular feedback about whether they are adequately meeting expectations             <ul style="list-style-type: none"> <li>◦ The best processes are simple and stimulate the right conversations around the right topics</li> <li>◦ Often the process is too focused on legal protection via detailed documentation</li> <li>◦ When employees focus more on official 'grades' and managers focus on documentation more than coaching, trust is diminished and communications suffer</li> </ul> </li> </ul>   |
| Compensation & Rewards                                   | <ul style="list-style-type: none"> <li>• Compensation &amp; Rewards should provide incentive for doing what is best for the organization             <ul style="list-style-type: none"> <li>◦ Especially true for executives, because incentives impact how they motivate subordinates</li> <li>◦ An employee who receive a raise should understand they are being rewarded for behaving consistent with core values and organizational objectives</li> </ul> </li> </ul>   |
| Recognition  | <ul style="list-style-type: none"> <li>• Leaders need to tell employees they are doing a good job             <ul style="list-style-type: none"> <li>◦ Leaders often think people are only motivated by money &amp; see praise as a cheap replacement</li> <li>◦ Employees, however, see financial rewards as a satisfier, not a driver</li> </ul> </li> </ul>  |



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| Firing   | <ul style="list-style-type: none"> <li>The decision to let someone go should be driven by organizational values             <ul style="list-style-type: none"> <li>If employee behavior is consistent with core/permission-to-play values, look at how the employee is managed and find a way to give a second chance to succeed</li> </ul> </li> </ul>  |
| Checklist for Discipline 4: Reinforce Clarity      | <p>A leadership team can be confident that they've mastered this discipline when the organization:</p> <ul style="list-style-type: none"> <li>Has a simple way to carefully select new employees based on company values</li> <li>Brings in new people by teaching them about the six elements of clarity</li> <li>Sets goals &amp; reviews employee progress consistent with the elements of clarity</li> <li>Fires employees who don't fit with core values, and helps those that do succeed</li> <li>Has compensation and rewards systems built around company values &amp; goals</li> </ul>  |
| <b>Chapter 7: The Centrality of Great Meetings</b> |  |
| Great Meetings                                     | <ul style="list-style-type: none"> <li>Meetings are a good indicator of organizational health</li> <li><i>Meeting Stew</i> – too many types of topics in one meeting (e.g. mixing tactical &amp; strategic)</li> </ul>   |
| The Four Meetings                                  | <ul style="list-style-type: none"> <li><i>Daily Check-In</i> (Administrative: 5-10 min daily) – least important meeting, but can be valuable             <ul style="list-style-type: none"> <li>No agendas, no issue resolution, just a quick exchange of helpful to know admin information</li> <li>These meetings can save time in the long run by preventing e-mails</li> </ul> </li> <li><i>Weekly Staff</i> (Tactical: 45-90 min weekly or bi-weekly) – most important meeting             <ul style="list-style-type: none"> <li><i>Real-Time Agenda</i>: 1) leaders identify 1-2 individual weekly objectives (30 sec each), 2) the team assesses the scorecard status: <b>R-Y-G</b> (5-10 min), 3) the team agrees on an agenda</li> <li>The team should avoid getting sucked into compelling issues that: 1) derail the focus on tactical issues, and 2) are strategic issue that can't be resolved during the meeting</li> </ul> </li> <li><i>Ad-hoc Topical</i> (Strategic: 2-4 hours monthly) – most interesting and compelling             <ul style="list-style-type: none"> <li>Dig into critical issues that have long-term impact and require time to resolve</li> <li>The most important piece of advice is to separate strategic from tactical conversations</li> </ul> </li> <li><i>Quarterly Off-Site</i> (Developmental: 1-2 days quarterly)             <ul style="list-style-type: none"> <li>The purpose is to step back and getting a fresh perspective on key issues</li> </ul> </li> </ul> <p>• Do leaders spend too much time in meetings? What else should they be doing - e-mail, analysis?</p> |
| Checklist for Meetings                             | <p>A leadership team can be confident that they've mastered meetings when they can affirm:</p> <ul style="list-style-type: none"> <li>Tactical and strategic discussions are addressed in separate meetings</li> <li>Tactical meeting agendas are set only after the team has reviewed progress vs. goals</li> <li>Strategic meetings have enough time for clarification, debate, and resolution</li> <li>Quarterly meetings are done off-site to review the industry, the organization, and the team</li> </ul>   |
| <b>Chapter 8: Seizing the Advantage</b>            |  |
| Seizing the Advantage                              | <ul style="list-style-type: none"> <li>The power of organizational health is undeniable, but it is largely untapped in most companies</li> <li>Early adopters will seize the advantage and achieve greater differentiation from competitors</li> </ul>   |
| Leader's Sacrifice                                 | <ul style="list-style-type: none"> <li>The leader of the team is crucial to the success of building organizational health</li> <li>Organizational health depends upon the genuine commitment &amp; active involvement of the leader</li> </ul>   |
| First Critical Steps                               | <ul style="list-style-type: none"> <li><i>Hold an Initial Off-site</i> – to build a cohesive team and create clarity</li> <li><i>Build a Playbook</i> – to outline the information above</li> <li><i>Conduct an Initial Communication</i> – to inform the organization and continuously remind it</li> <li><i>Design Systems to Reinforce</i> – to embed the playbook into every process that involves people</li> </ul> <p>• The initial steps will take 1-6 months depending upon how much focus is allocated</p>  |