**SMARTtools for Leaders™**

**Priorities** (discussion notes)

**Participant Names:** John Beardsley, Frances Houghton, Tina Roberts, Jon Kweku, Gloria Cerno, Ellie Johnson, Ron Hatu, and Claire Benson.

**Date:** 11/13/2016

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| 1. ***Let’s all circle the number that describes our priorities.*** |

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| **1** | “We have not thought about our priorities at all.” “We are just doing stuff, without a sense of what is expected or why.” |
| **2** | “We have thought just a little bit about our priorities, but we are not sure they are the right ones.” “There is no consensus about what our priorities should be.” |
| **3** | “We have a vague sense of what we want to achieve, but it’s not specific.” |
| **4** | “We have spent some time clarifying our priorities, but we are not in agreement that we have the right ones or that other people in our organization know what they are.” |
| **5** | “We have a general sense of what we are trying to accomplish, but we have not discussed or debated to know if they are the right priorities.” |
| **6** | “We have priorities, but there are too many of them,” or “Too few of them,” or “We are not focused on the right things.” |
| **7** | “Some people might know what the priorities are, but not everybody.” |
| **8** | “We have healthy discussion and debate about what our priorities are, and we are almost in full agreement that we are on the right track but we have not yet connected the priorities to everyone’s job.” |
| **9** | “We have clarified our priorities, they are the right ones, and we are in the process of linking them to everyone’s roles and goals.” |
| **10** | “Our priorities have been widely discussed, debated, agreed upon, and communicated. They connect to our mission and are the correct ones to achieve our broader goals, and we are all crystal clear about them.” |

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| 1. ***Let’s discuss our ratings.*** |

The low score was a 2. High score was a 6. The average score was a 4/10.

Huge disagreements about what our priorities should be. Frances and Jon think that international expansion is where we should be headed next year. Gloria, Ellie, Ron, and Claire say “no way” and think we should invest more in product development before we expand geographically.

What a mess. We need to get on the same page.

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| 1. ***Let’s discuss ways to improve our rating of our priorities.***   ***What should our priorities be, and why?***  ***Which priorities are worth doing, and why?***  ***Which priorities are the most do-able, and why?***  ***Which priorities should we delete, and why?*** |

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After a 30-minute discussion and debate, we came out with this list of priorities, ranked from best to worst.

1. Improve implementation speed from 6 weeks to 2 weeks, specifically for the mid-size corporate market (500-2,000 employees). People scored this one a 9 for “worth doing” and a 9 for “do-able.” This is on Gloria the CTO/Head of Implementation’s team to figure out a plan. Pitch a plan at Executive Committee within 2 weeks.
2. Expanding to California. We realized we had so many profitable companies there, but no feet on the street. 9 for worth doing and 8 for do-able. Boots on soil within 6 months. This is Claire’s outcome to own, but she’ll need all hands on deck to make that expansion successful.
3. Changing the sales compensation system within 3 months, to reward the profitability of the accounts, not just new account gross revenue, to motivate pricing discipline and improve customer service and customer satisfaction scores from 71% to 90% by end of next year. This got an 8 for “worth doing” and a 7 for “do-able” because of the fight that is likely to ensue when we change their compensation. I’ll take that one to own, and I’ll need CFO and HR help before we approach the sales team.

Other priorities we nixed were: expanding to Europe or Asia next year, M&A, coming out with a lower-price-point product line, ramping up our digital marketing budget, and overhauling our internal onboarding and training & development (but we agreed we’ll likely focus on that one in the following year).

We agreed that if we focus on those 3 priorities, our “P” score will go from a 4 to an 8. Then to get it to a 9 or 10, we need to link everybody’s scorecards in some way to those priorities. Great meeting! We now know what we want to do, who’s doing it, and by when.