



THE BLENDIFICATION® SYSTEM

**Activating Potential by Connecting
Culture, Strategy, and Execution**

CHAPTER 14 EXECUTION CHECKLISTS

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Strategic Leadership Team Preparation & Responsibilities Checklist

✓	Action	Timing from Retreat
	Set-up times for Connection Meetings (approximately every-other-month); send out calendar invites to Strategic Leadership Team and Roots Groups.	One week
	Set-up times for Calibration Meetings (approximately every four months); send out calendar invites to Strategic Leadership Team only.	One week
	Ensure Roots Groups are prepared for the initial Roots Groups Meeting and are using the <i>Roots Group Meeting</i> template. There is at least one Strategic Leadership Team member in each Roots Group. This member is initially responsible for ensuring the Roots Group is prepared and using the materials to ensure success.	One week
	Roots Group Meeting: Using the <i>Roots Group Meeting</i> template, 1) review progress toward Strategic Outcomes – if dashboard has been created, 2) identify optimal Strategic Actions – create new list using template, 3) make sure Strategic Actions connect to Strategic Outcomes, 4) overcome obstacles, and 5) list the support needed from the Strategic Leadership Team.	Two weeks
	Breakdown longer-term Strategic Outcomes into shorter timeframes used to populate the Blendification Dashboard (annual, quarterly, monthly).	Four weeks
	Create one-page Blendification Dashboard with the Strategic Focus Statements and Strategic Outcomes used to track and communicate in all Strategy Execution Meetings. Generally, someone in Finance/Accounting creates this as communication and tracking basis for all meetings.	Six weeks
	Check-in with the Roots Groups to make sure they are progressing toward the Connection Meeting and are following the <i>Connection Meeting Preparation</i> template (focusing on solutions and support needs).	Six weeks
	Connection Meeting: Each Roots Group has 25 minutes to share a short update on progress and request support. Generally, every-other-month.	Ten weeks
	Take the Strategic Focus Statements from the Strategy Whiteboard and make them visible within the organization.	Ten weeks
	Calibration Meeting: Strategic Leadership Team meeting to review Strategy Whiteboard and modify, if necessary. The Roots Groups do not participate; only the Strategic Leadership Team representative participates.	Five months
	Update Strategy Whiteboard, as needed.	Ongoing
	Destination Meeting: Plan for annual Destination Meeting offsite with Strategic Leadership Team.	One year

Roots Group Preparation & Responsibilities Checklist

✓	Action	Timing from Retreat
	Connect with all Roots Groups Members to ensure they are committed to success and will engage in substantive discussions to ensure potential is realized.	One week
	Identify Roots Group meeting time.	One week
	Assign meeting facilitator for next Roots Group meeting. Rotate facilitator for future meetings. It is likely the first Roots Group meeting facilitator will be a member of the Strategic Leadership Team.	One week
	Meeting facilitator completes the <i>Roots Group Meeting</i> template and distributes it to the rest of the group (example in this package).	Day before Roots Group Meeting
	Roots Group Meeting: Using the <i>Roots Group Meeting</i> template, 1) review progress toward Strategic Outcomes – if dashboard has been created, 2) identify optimal Strategic Actions – create new list using template, 3) make sure Strategic Actions connect to Strategic Outcomes, 4) overcome obstacles, and 5) list the support needed from the Strategic Leadership Team to be discussed at Connection Meeting, or sooner.	Two weeks
	Roots Group members coordinate Strategic Actions with Offshoots and other Roots Group members.	Ongoing
	Connection Meeting: Roots Group prepares the <i>Connection Meeting</i> template or similar PowerPoint template. Each Roots Group has 25 minutes to remain focused on Solutions, Outcomes, and Support. Meeting takes place approximately every other month.	Ten weeks

Calibration Meeting Preparation & Responsibilities Checklist

✓	Action	Timing
	<p>Make sure entire Strategic Leadership Team is available to meet. Meeting is approximately three to four hours every four months. Team may consider meeting offsite. Reserve space for meeting.</p>	<p>Ongoing</p>
	<p>Reference and complete the <i>Calibration Meeting</i> template to prepare and conduct the Calibration Meeting.</p> <ul style="list-style-type: none"> • General Information Section: The first page should be completed prior to the meeting. Strategic Leadership Team is responsible for completing this page. • Strategic Focus Area Pages: There is a separate page for each Strategic Focus Area. The respective Roots Group is responsible for pre-populating their page. The Strategic Leadership Team will coordinate this with each Roots Group. • Financial Outcomes Page: Strategic Leadership Team is responsible for populating this page. 	<p>Ten days prior to Calibration Meeting</p>
	<p>Distribute completed <i>Calibration Meeting</i> template to Strategic Leadership Team as pre-read along with Blendification Dashboard.</p>	<p>Seven days prior to Calibration Meeting</p>
	<p>Calibration Meeting: Strategic Leadership Team meets to review information from prior Connection Meetings (with Roots Groups) and review potential impacts and changes to the Strategy Whiteboard.</p> <p>Meeting Structure (highlighted in Calibration Meeting template):</p> <p>Strategic Analysis Review</p> <ul style="list-style-type: none"> • Potential: Discuss (does not change) • External Impacts: Modify where necessary based on changes • Internal Evaluation: Modify where necessary based on changes • Financial Outcomes: Update with current results • Foundation: Discuss (does not change) <p>Strategic Focus Area Working Session</p> <ul style="list-style-type: none"> • Customer & Market • Product • Operations • People • Financial Outcomes <p>Next Steps Follow-up</p>	<p>120 days after completion of Destination Meeting – every 120 days thereafter</p>