



THE BLENDIFICATION® SYSTEM

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

CHAPTER 14 EXECUTION MEETING TEMPLATES

DANIEL M. BRUDER

Date:	Facilitator:	Strategic Focus Statement:
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Movement since last Roots Group Meeting (update on Next Steps from prior meeting)

- 1.
- 2.
- 3.
- 4.
- 5.

Strategic Outcome Review (list Strategic Outcome and Check Box) Off Path On Path

	Off Path	On Path
1.		
2.		
3.		
4.		
5.		

**Strategic Action Review & Modification (discussed during the meeting)
What Actions are effective? What Actions are falling short? What new/modified Actions are needed?**

Actions	Strategic Outcome #1	Strategic Outcome #2	Strategic Outcome #3	Strategic Outcome #4	Strategic Outcome #5
Effective					
Falling Short					
New/ Modified					

Strategic Support | Requests for Strategic Leadership Team at Connection Meeting

- 1.
- 2.
- 3.

Roots Group Next Steps (reviewed at the beginning of the next meeting)

Step	Roots Group Member	Date Due
1.		
2.		
3.		
4.		
5.		

Strategic Action List

List below one Strategic Outcome and then record the Strategic Actions from the Strategy Whiteboard. The first column is prepopulated by the Facilitator; remaining columns completed at Roots Group Meeting. Prioritize and modify/add/subtract Strategic Actions, as needed. The Roots Groups will likely change/reprioritize Strategic Actions throughout the year to achieve the Strategic Outcomes. The Roots Groups are empowered to identify the most optimal Actions to achieve the Outcomes.

Strategic Outcome:

Strategic Action	Roots Group Responsibility	Offshoot	Date Due

Date:

Customer & Market Strategic Focus Statement:

General Review

What is the group's level of commitment to the Strategic Focus, Outcomes and Actions?

What is working within the Roots Group?

What can be improved within the Roots Group?

Customer & Market Strategic Outcome Review (list the Strategic Outcomes)

1.

2.

3.

4.

5.

Key Strategic Actions for Discussion (prioritize key Actions)

1.

2.

3.

4.

5.

Strategic Support (requested support from the Strategic Leadership Team)

1.

2.

3.

4.

5.

Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

5.

Date:

Product Strategic Focus Statement:

General Review

What is the group’s level of commitment to the Strategic Focus, Outcomes and Actions?

What is working within the Roots Group?

What can be improved within the Roots Group?

Product Strategic Outcome Review (list the Strategic Outcomes)

1.

2.

3.

4.

5.

Key Strategic Actions for Discussion (prioritize key Actions)

1.

2.

3.

4.

5.

Strategic Support (requested support from the Strategic Leadership Team)

1.

2.

3.

4.

5.

Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

5.

Date:

Operations Strategic Focus Statement:

General Review

What is the group's level of commitment to the Strategic Focus, Outcomes and Actions?

What is working within the Roots Group?

What can be improved within the Roots Group?

Operations Strategic Outcome Review (list the Strategic Outcomes)

1.

2.

3.

4.

5.

Key Strategic Actions for Discussion (prioritize key Actions)

1.

2.

3.

4.

5.

Strategic Support (requested support from the Strategic Leadership Team)

1.

2.

3.

4.

5.

Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

5.

Date:

People Strategic Focus Statement:

General Review

What is the group’s level of commitment to the Strategic Focus, Outcomes and Actions?

What is working within the Roots Group?

What can be improved within the Roots Group?

People Strategic Outcome Review (list the Strategic Outcomes)

1.

2.

3.

4.

5.

Key Strategic Actions for Discussion (prioritize key Actions)

1.

2.

3.

4.

5.

Strategic Support (requested support from the Strategic Leadership Team)

1.

2.

3.

4.

5.

Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

5.

Date:

Customer & Market Strategic Focus Statement:

Movement since Last Connection Meeting (update on Next Steps from prior meeting)

1.

2.

3.

4.

5.

Strategic Outcome Review

Strategic Outcomes (list the Strategic Outcomes in the appropriate box)

Off Path

(Strategic Outcomes that are behind Plan)

On Path

(Strategic Outcomes that are meeting or exceeding Plan)

Strategic Action Assessment (Solution Focused – What Actions will be taken to enhance Outcomes?)

Actions

Course Correction

(Strategic Actions to ensure 'Off Path' Outcomes move to 'On Path')

Course Maximization

(Strategic Actions to stretch 'On Path' Outcomes beyond Plan)

Strategic Support (requested support from the Strategic Leadership Team)

1.

2.

3.

4.

5.

Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

5.

Date:

Product Strategic Focus Statement:

Movement since Last Connection Meeting (update on Next Steps from prior meeting)

.2

2.

3.

4.

5.

Strategic Outcome Review

Strategic Outcomes (list the Strategic Outcomes in the appropriate box)

Off Path

(Strategic Outcomes that are behind Plan)

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Strategic Support (requested support from the Strategic Leadership Team)

1.

2.

3.

4.

5.

Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

5.

Date:

Operations Strategic Focus Statement:

Movement since Last Connection Meeting (update on Next Steps from prior meeting)

1.

2.

3.

4.

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Strategic Outcome Review

Strategic Outcomes (list the Strategic Outcomes in the appropriate box)

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Strategic Support (requested support from the Strategic Leadership Team)

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Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

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Date:

People Strategic Focus Statement:

Movement since Last Connection Meeting (update on Next Steps from prior meeting)

1.

2.

3.

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Strategic Outcome Review

Strategic Outcomes (list the Strategic Outcomes in the appropriate box)

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Strategic Support (requested support from the Strategic Leadership Team)

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2.

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Roots Group Next Steps (completed during Connection Meeting)

1.

2.

3.

4.

5.

STRATEGIC ANALYSIS REVIEW

Potential – prepopulated

Financial & Metrics – prepopulated and updated with most current results

Foundation – prepopulated

Foundational Strategy	
Business Objective	
Core Competency Statement	

External Impacts Changes – group discussion

What was missed, what has changed, and what are new External Impacts to the organization (future-based)?

Internal Evaluation Changes – group discussion – Strength and Weaknesses

Based on the External Impacts how are you positioned internally from a capabilities and resources perspective?

Strategic Focus Statements – prepopulated

Customer & Market:	
Product:	
Operations:	
People:	

CUSTOMER & MARKET STRATEGIC FOCUS AREA

Strategic Outcomes – prepopulated	Off Path	On Path

How have the changes to the External Impacts and Internal Evaluation (first page) impacted the Strategic Outcomes, if at all? What changes need to be made, if any to the Strategic Outcomes (either from a measurement perspective or different Strategic Outcomes)? – everyone participates

Off Path and/or New Strategic Outcomes | What Strategic Actions should be taken?

On Path Strategic Outcomes | What Strategic Actions should be taken to maximize outcomes?

Are the right people in the Roots Group? Who should be subtracted/added? – Roots Group member leads

What will be done as a result of the discussion and who is the owner?

Action	Next Steps	Member of SLT

PRODUCT STRATEGIC FOCUS AREA

Strategic Outcomes – prepopulated	Off Path	On Path

How have the changes to the External Impacts and Internal Evaluation (first page) impacted the Strategic Outcomes, if at all? What changes need to be made, if any to the Strategic Outcomes (either from a measurement perspective or different Strategic Outcomes)? – everyone participates

Off Path and/or New Strategic Outcomes | What Strategic Actions should be taken?

On Path Strategic Outcomes | What Actions should be taken to maximize outcomes?

Are the right people in the Roots Group? Who should be subtracted/added? – Roots Group member leads

What will be done as a result of the discussion and who is the owner?

Action	Next Steps	Member of SLT

OPERATIONS STRATEGIC FOCUS AREA

Strategic Outcomes – prepopulated	Off Path	On Path

How have the changes to the External Impacts and Internal Evaluation (first page) impacted the Strategic Outcomes, if at all? What changes need to be made, if any to the Strategic Outcomes (either from a measurement perspective or different Strategic Outcomes)? – everyone participates

Off Path and/or New Strategic Outcomes | What Strategic Actions should be taken?

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Are the right people in the Roots Group? Who should be subtracted/added? – Roots Group member leads

What will be done as a result of the discussion and who is the owner?

Action	Next Steps	Member of SLT

PEOPLE STRATEGIC FOCUS AREA

Strategic Outcomes – prepopulated	Off Path	On Path

How have the changes to the External Impacts and Internal Evaluation (first page) impacted the Strategic Outcomes, if at all? What changes need to be made, if any to the Strategic Outcomes (either from a measurement perspective or different Strategic Outcomes)? – everyone participates

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