



Implementation Road Map

Stephen Covey suggested that “[t]he key is not to prioritize what’s on your schedule, but to schedule your priorities.” This advice can be difficult to follow when priorities conflict.

By Dan Zahlis

Many years ago, I attended a great training course. The course was called “Consulting for Organizational Effectiveness,” and I’ll never forget a question asked by the instructor. He asked us to identify who our customer was during a typical consulting engagement.

Most of the attendees were private consultants and had very similar answers, such as “the CEO,” “the person who engaged me,” “the person paying my invoice” and other similar sentiments. I never had been a private consultant, but I was sent to the course to improve my effectiveness as an internal service provider. After realizing nobody was providing the response the instructor was seeking, and after overcoming my complete lack of self-confidence, I nervously raised my hand and responded with a weak and shaky voice, “The organization?” The instructor literally screamed, “Exactly!” Confidence restored.

Organizations are distinct entities defined by a specific mission and purpose. Plans should be defined by the needs of the objective organization, and not in favor of any personal or functional agenda. This is why great consultants (internal and external) tend to say the darnedest things and make uncomfortable recommendations to the very people that hire them. Experienced advisers tend to focus improvement ideas on the interests of the organization, even if those ideas conflict with individual or departmental priorities.

The problem with establishing objective priorities, from an “organization’s” perspective, is that individual priorities can, and will, conflict. The challenge is to set and revisit organizational priori-

ties with all stakeholders present and begin to dismantle rote schedules in favor of organizational needs.

When it comes to controlling operational risk and managing regulatory compliance, incumbent tasks often conflict with an organization’s “core” purpose. Risk control and/or regulatory compliance can be transformed from a series of conflicting tasks to a list of scheduled priorities by allowing the objective organization to establish shared purpose.

The Implementation Road Map Active Agenda module specifically was designed for the purpose of determining and scheduling organizational risk priorities. The module (process, really) is useful to organizations whether they are implementing Active Agenda or not.

The process begins with the distribution of card decks to each participant. Each card in the deck represents an operational risk control process and a description of the corresponding module (aka risk control business practice). Each participant is asked to collate their cards into four stacks based on their individual or functional priorities. Each participant’s priorities are recorded and averaged to produce an organizational priority list.

After consensus is reached and a list of operational risk control priorities are established, process owners can be assigned and action plans can be scheduled.

The Road Map process can be used on a regular basis to calibrate schedules to organizational priorities rather than allowing disjointed schedules to define the course for organizational success. In other words, the road mapping process allows an organization to “schedule” its risk control priorities.

What Gets Measured

The Implementation Road Map module enables the measurement of individual or functional priorities and contrasts them with those of the organization. The road mapping process allows organizations to capture risk control priorities and record subordinate priorities to be addressed later. The module also allows organizations to measure personal assignments for risk control priorities at both the program management and execution levels.

The Implementation Road Map module allows companies to quantify the work load associated with risk control, the conflicts created by competing priorities and the opportunities to share work as a way of elevating operational risk control on the organization’s priority list.

What Gets Done

Organizations dramatically can improve their risk control program by using the Implementation Road Map module or some similar process. As peers share their perspectives and business practices in an open environment, they frequently identify redundant tasks and ineffective business practices. “What gets shared gets priority.”

Each one of Active Agenda’s modules is designed with a focus on business process rather than functional difference. With a focus on process (objectivity) rather than function (subjectivity), road map participants often enter the exercise with a busy schedule and leave with a short list of scheduled priorities. A list of priorities that get done.

This Month’s Links

■ **Module List:** <http://activeagenda.net/documentation/index.php?title=Category:Modules>

■ **Demo:** <http://demo.activeagenda.net/list.php?mdl=irm>

■ **Wiki:** http://activeagenda.net/documentation/index.php?title=Implementation_Road_Map_Module

■ **Forum:** <http://activeagenda.net/discussions/viewforum.php?f=128&sid=afd89715109b4326effe47734d54685f>