

## CASE STUDY

# Keeping score: Learning how to clarify objectives, measure outcomes, and increase accountability allows organization to implement strategic plan

## SITUATION

An organization with approximately 45 employees and several different bargaining units was facing pressures in revenue and income from what they described as having unclear priorities. There was a lack of accountability for performance and customers were rather unhappy and dissatisfied with the quality of the organization's work and performance. As a result, the organization asked Pondera to initiate a Strategic Planning Process with them in order to transform their culture into one that would gain clarity about long-range priorities and improve customer service.

## OUR FACILITATION

To begin the process Pondera facilitated some extensive conversations with the organization's customers by way of some written online surveys and conducted several focus groups with approximately 15 people from different customer groups. Pondera then facilitated a two-day off-site strategic planning retreat. The process involved the CEO down to all levels of the organization. During the strategic planning retreat, clear execution plans were created and action teams were formed to help implement the plans. In addition, Pondera conducted monthly accountability meetings to help gauge the progress of the plan and to address unexpected barriers or change that needed to be made in the plan in order to make sure that it went forward. While a collaborative planning process was foreign to almost all of the employees (who were used to a top down leadership style), all of them became highly engaged in the planning process.

## OUTCOME

Through the use of Pondera's collaborative Strategic Planning Process, all employees of the organization participated in the creation of a scorecard to measure goals and outcomes. The metrics, which did not exist beforehand, provided a clear outline to measure the goals they had set for themselves. In addition, the execution plans that were developed required much accountability from all levels of the organization. The leaders of the organization no longer tolerate a lack of accountability among themselves and among others. They have taken pride in the cultural change that took place and it has given them the courage to demand more of themselves and of each other.