

LISA H. HARRINGTON



ABIDING STRATEGIES

**BUILD YOUR
BEST
BUSINESS FOUNDATION**

COMPANION WORKBOOK

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For:

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d/b/a Abiding Strategy®

ABIDING STRATEGIES — BUILD YOUR BEST BUSINESS FOUNDATION
[COMPANION WORKBOOK]

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ACKNOWLEDGMENTS

For me, this is the most difficult part of the book.

How can I acknowledge the hundreds who have helped, influenced, supported and pushed me to do this work? There are simply too many.

A few stand out for various reasons. Some have been in my life for so long now that their influence was inevitably valuable. Certainly this includes all my family, my Dad & my Paul, Kim & Mark and Kelly & Howard.

Some more recent — like Ken, Sara, Artemis, Dee and Nora have shown me that there is always more to do. This book wouldn't even have happened without Diane and Wendy.

The support of my *Abiding Grace Lutheran Church* family has been priceless, and probably impossible to measure. My prayer group is a treasure. These people have my heart, especially the Billardello family.

My clients, now and in the past, have trusted me, inspired me and set me straight on occasion.

The friends from various group memberships in Southlake, a city with no equal, have shared their stories of hope and struggle and moved me to be better.

Because both of my books (so far!) have been a culmination of all my life experiences, it's virtually impossible to name everyone.

In whatever way YOU have helped me, even if simply buying my book, I am eternally grateful. Thank you!



My system is designed for business executives who need to deliver better results in leadership. I will guide you through your own illusions & realities and help you work within your own innate talent to be a better leader.

You can and should be YOU! We'll bring out your best so you can bring out the best in your business, crew and others.

LET'S BUILD BETTER BOSSES.

— Lisa

**For best results, please read the full book text from
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To Order please visit: AbidingStrategies.com

If you have questions, please ask!
Email me: Lisa@AbidingStrategy.com

Why I Wrote The Book

Some have asked me why would I share this proprietary, original process that I developed? Why share the Abiding Strategy® process in a book?

I have always believed that if you do the right thing, the money will follow. Thirty years ago, standing in a bookstore I saw a book by that title. I don't remember if I bought it. But the words stuck, and here we are.

Lots of books have been written about the idea. The concept of giving to “get” isn't new.

Of course, I make my living now, in part, by facilitating the Abiding Strategy® process for clients. I can run a few dozen sessions a year personally and have repeat clients, too, who come back because they are actually able to implement and finish the plans. This is rare.

But I am only one person, and I want to help more businesses to live their values and leave lasting legacies.

Small businesses in America are the key to our ongoing success. The drive and determination of our citizens to do more, be better and help others makes us the greatest nation.

So, I wrote the book.

Entrepreneurs who are just starting out can use the book and workbook to run their plan, grow their organizations and help our economy, their employees and customers in a new way. Businesses that need to get to the next level can apply the principles of the book and build a plan that will endure.

After 2022, I will be licensing the process so that others can facilitate sessions for folks who find that using the book isn't quite enough.

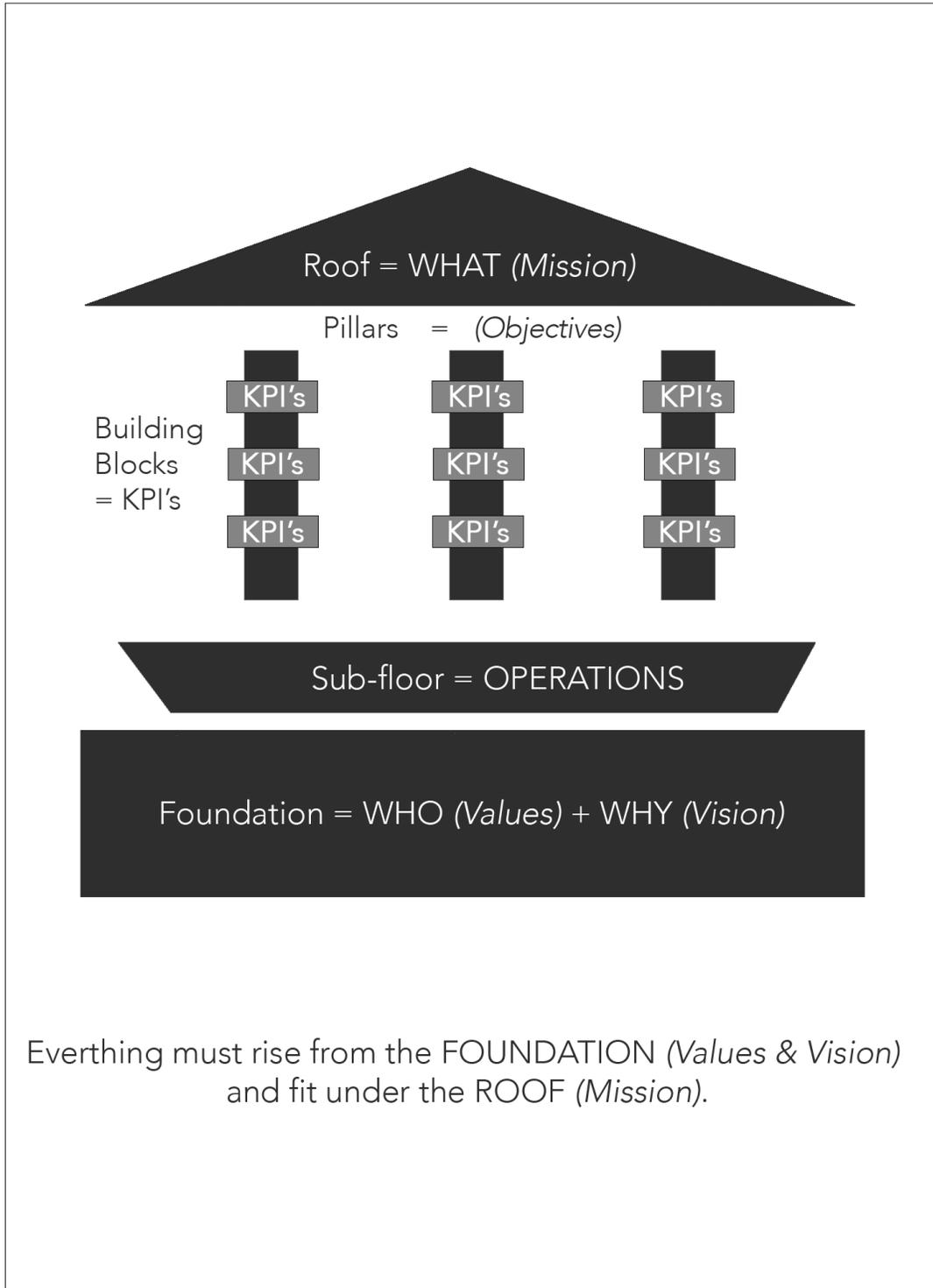
This process works for any business, and it's as timeless as our individual spirit as humans.

I, too, want to leave a legacy.

Won't you join me?



The STRATEGY Includes



THE BUSINESS

Your Blueprint for STRATEGY PLANNING

Why don't more American businesses have a plan?

Strategy Planning is hard.

One reason it's hard is that the decisions you make in your strategy session will be with you a long time. The idea is to set a direction for the organization for the next 1-10 years, depending on your situation. The 12-18-month plan has more detail, including points of execution key performance indicators, and personnel assignments, to mention a few. The longer-term strategies, 2-10 years or so, are much more general, laying out concepts without the details. You want to know the overall mission, but the specifics will be adjusted each year to accommodate current situations, technology, staffing, and so on.

Another challenge is that it takes time to work through the plan, and you don't always see quick, tangible results after the many meetings you attend to work with the group to write the plan. So, it can get discouraging. Humans like instant gratification, which is one reason why my planning sessions include the design of a visual aid. More on that later.

The thing is, having a strategy is a critical component to building best practices and getting your organization to the next level. This is a fact easily demonstrated by a number of analogies and real-life examples. I've read that only 20% of American businesses have a strategy in place. Of those, in my personal experience, only about half actually use it and follow the plan.

According to OnStrategy:

- 95% of a typical workforce doesn't understand its organization's strategy
- 90% of organizations fail to execute their strategies successfully
- 86% of executive teams spend less than one hour per month discussing strategy
- 60% of organizations don't link strategy to budgeting

Besides the fact that I love the process, it's the main reason I wanted to write this book. Business in the U.S. is critical to our capitalist society. If more businesses would plan properly, we'd be more prosperous. That prosperity is then useful in so many ways, for the employees, stakeholders, beneficiaries of philanthropy, and more.

And like most things, it helps to prepare before you start the process. They say painting is 95% prep and clean up and only 5% actual painting. In our case, we'll spend about 15 hours prepping, five to ten hours in the actual planning session with the group, and four to six hours cleaning up and sharing the documentation including the visual aid. Implementation is a whole different story, and some helpful information is included in section three of the book.

Who is at risk if there is no plan? Oh, where do I even begin? How about: everyone?

Third generation owners need a plan so all of the family can agree on what has to happen when Grandad really retires. This is the time in family businesses where most fail. So be sure that the grandkids are interested, involved and engaged in the planning so they will be successful later.

Partnerships need a plan to be sure they all agree on the overall direction for the long game. One of the most important things about creating a plan, or any business documentation like job descriptions, values statements and policies, is the communication that happens around the process of writing these important documents. At the very least, it forces us to talk to each other.

Giant corporations need a plan so that they can get all the employees rowing in the same direction. We'll talk about CREW and implementation in section three of the main book, but they can't get you where you want to go if you don't give them a map.

Solopreneurs need a plan to (1) Stay small and solo, if that's the desire or (2) Grow carefully so they don't out grow their own time and fail because of too much demand. Don't spend so much time on the thing you do that you forget to work on the business itself. Work ON the business, not just IN it.

Non-profits need a plan to be sure they are serving their clients in the most effective way, and handling everything so that they can live up to the inevitable scrutiny. I work a lot with non-profits, having been in that world for 15 years and even certified as a non-profit manager.

It's a significant responsibility for everyone to run a business. *Having a plan helps us all to share the burden and the fun!*

If you have come across this workbook without benefit of the full text of the BOOK, please see how to purchase at:

AbidingStrategy.com

THE CONVERSATION

Why WORDS Matter

Most of the problems in business come to us via issues with communication. By having a Strategy Plan, and holding a workshop, the messages that are so important about the business will be clearly communicated to those who must implement the ideas daily. Building the language of your culture is critical, and consistency in use will help guide and clarify the plan to all involved.

Two by Two ice breaker: 2 people, 2 words, 2 minutes: have your crew pair up with someone they don't work with daily, and share two things with their partner that isn't widely known about them. We're building trust in these sessions too, so that they have someone to connect with later, while working through the plan. After they visit, have them share with the room.

Most people are familiar with the process of sorting through an issue by asking who, what, when, where, how & why.

STRATEGIC Elements	
WHO	VALUES (Foundation)
WHY	VISION (Foundation)
WHAT	MISSION (Roof)
HOW	Objectives (Pillars) Key Performance Indicators (Building Blocks)
TACTICAL Elements	
WHEN	Timelines
WHERE	Market
HOW	Tactical steps to accomplish each objective and KPI

Power of THREE

- 3 Pillars/Objectives
- 3 KPIs/Building blocks per pillar
- 3-Year Plan (Max)
- 3 Months/Quarterly Reporting
- 3 People minimum per committee/task force

Room Layout

- ~ An open U is best
- ~ Comfortable location

Supplies

- ~ Whiteboards
- ~ Markers
- ~ Pen
- ~ Paper
- ~ Snacks

Values WORDS & Eliminating Duplications

Eliminate the duplicates or words that are very similar in context, and select which words work best for your company and write them below. You will probably be down to 15-20 words at this point.

Now the hard part for values: You have to bring this down to four to six words maximum.

You can try to make a phrase, or alliteration, or acronym. The words can be put in order of importance, or alphabetically, but do something that helps with memorizing the words if you can.

The FINAL Value WORDS: (Foundation)

Make a LIST

You may just select four to six words that you have in a list, and leave it at that.

Make an ALLITERATION

Or, you can find a way to make them an alliteration, such as:

*Servants, Stewards, Spiritual, Steadfast, Sharing.
Timely, Trusting, Technical, Team, Thankful, Tolerant.*

Make an ACRONYM

Or you can make an acronym, etc., essentially using the letters to make a seventh word that fits. One client had a list that spelled “GIPSIS” which was a take on a word used often in his industry. Another was able to spell out HELPER. This doesn’t always work, but when it does it’s useful.

You can be creative! Remember, the idea is that it’s so short and easy to remember that you can count on your crew to be able to rattle off the vales any time. If it’s too long, they won’t remember, and neither will your clients.

Make a SENTENCE

You could create a short sentence with the six words, as long as it doesn’t dilute the memorable nature of the phrase.

Make a RHYME

Sometimes, we can find a way to make a rhyme or rhythm to the phrase, to increase the memory.



Objectives (Pillars)

Decide on three pillars/objectives that categorize the areas of work that need to be done in the next 3 years. Generally, these are going to include at least one pillar for financial objectives, and one for human elements (*staff, customers, etc.*) The third is usually unique to the organization.

Take nominations and discuss.

NOMINATIONS for Objectives (*Pillar labels & categories*)

The FINAL Three Objectives (*Pillars*)

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KEY PERFORMANCE Indicators (KPIs)

For each pillar/objective, you'll need to decide the three most important performance indicators to let you know you're succeeding toward the objective and staying on track for the plan.

Breakouts by Pillar for prioritization can be done if needed at any point. If you have more than 12 in the room, you'll certainly need to do this. Send groups away to decide on KPIs for a certain pillar, and what they think the priorities should be.

NOMINATIONS for KPIs for Pillar Objective ONE

Combine, eliminate duplication, categorize and create the final three KPIs for Objective ONE: Be sure they are phrased with SMAARRRRT in mind (*see pg 25 of workbook*).

The FINAL KPIs Pillar ONE

NOMINATIONS for KPIs for Pillar Objective THREE

Combine, eliminate duplication, categorize and create the final three KPIs for Objective THREE: Be sure they are phrased with SMAARRRT in mind (*see pg 25 of workbook*).

The FINAL KPIs Pillar THREE

Remember, “left-over” KPI’s are not discarded! They are just a bit lower as priorities. As you finish up KPI’s — go back to the longer list of nominations and add the top three.



Prioritization

A couple notes for larger groups, or if you have too many items on your list from the brainstorming sessions.

In front of the room, put a flip chart page up to gather all objectives from the entire room.

Then count everybody off in threes and send them to a spot with another flip chart and have them prioritize the list. Then everyone can discuss what the real top three are and explain why they have prioritized the way they did; hopefully some of the small groups will already agree on the first couple.

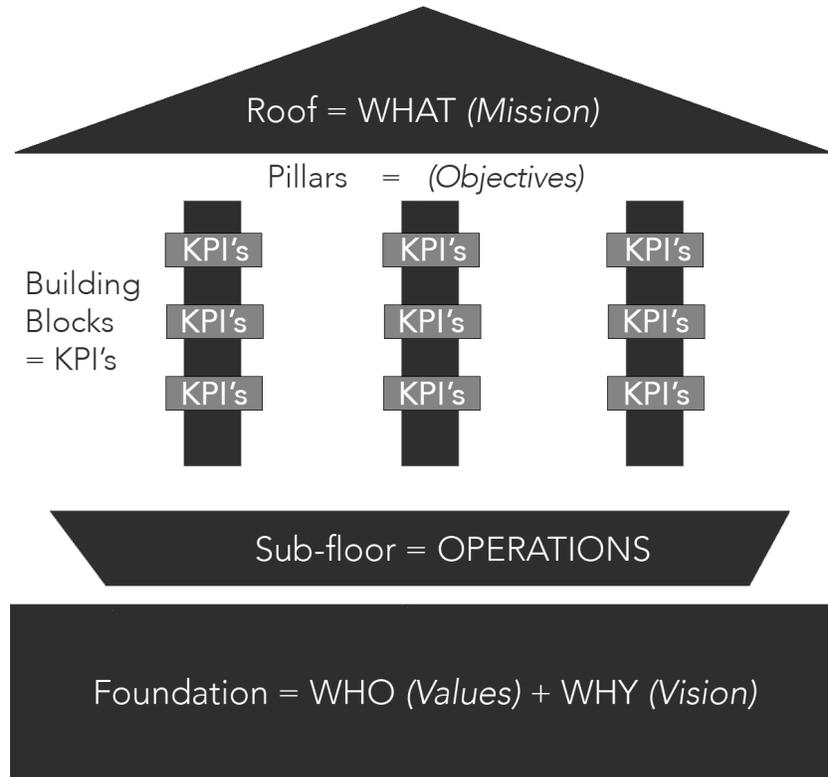
Another way to reduce the list if it's too long: break in groups of three to decide which items within those belong in Operations or Admin instead of on strategic pillars. Are there items that we know we want to do, but they are not technically "strategic?"

Once that's done: finalize the 3 KPIs per pillar now.



Discuss the Visual Aid

What will best represent the organization and intent?



Everything must rise from the FOUNDATION (*Values & Vision*) and fit under the ROOF (*Mission*).

[NOTE: We use a house as a visual aid at Abiding Strategy®, but you may prefer a mountain or a truck or other image. Use what fits best!]



Implementation

- Set Timeline by objective
- Assign committee/department responsibilities
- Determine reporting structure and timing

SUMMARY CONCEPTS	
WHO	VALUES
WHY	VISION
WHAT	MISSION
WHERE	LOCATION/MARKET
WHEN	TIMELINES
HOW	OBJECTIVES, KPIs, TACTICS



How To Use SMAaRrrrT Goals

Each KPI (*Building Block*) and most Tactical Action Steps should be measured based on a modified SMART Goals concept. You can run a couple of exercises using the information below to teach the group how it works.

SMAaRrrrT GOALS/Objectives

- Specific
- Measurable
- Attainable
- Aligned with our strategy
- wRitten
- Resources needed
- Responsibility (*of ...whom*)
- Reward if completed
- Time based (*set a deadline*)

Name the Overall Objective (Pillar):

Name one key performance indicator (*building block*) that gets you to that objective/pillar:

How is it S?

How is it M?

How is it A (x2)?

How is it R (x4)?

How is it I?



Tactical Plan for [] Strategy Years []

YOU'LL HAVE AT LEAST NINE OF THESE PAGES, if you have 3 Objective Pillars
and 3 building block KPIs per Pillar

Objective [Insert Pillar Name]: _____

KPI [Insert Building Block Name]: _____

	Tactical Step	Assigned to	Due Date	Done Date
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Tactical Plan for [] Strategy Years []

Objective [Insert Pillar Name]: _____

KPI [Insert Building Block Name]: _____

	Tactical Step	Assigned to	Due Date	Done Date
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Tactical Plan for [] Strategy Years []

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The Abiding Strategy® IMPLEMENTATION QUESTIONS

The important part is to plan out some time each week to keep the process going. It's really easy for these things to get set aside in the busy-ness of day-to-day work. It can be an agenda item on each staff and board meeting, or you can plan one hour a week for each dept to discuss strategy, or require an all-hands meeting once a month to report out... whatever works best — but keep it out front.

In the meantime, here are some things to consider:

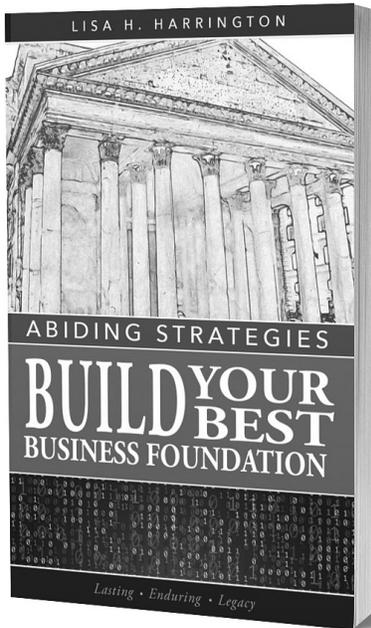
1. How do you want to do the visual aid?
 - a. Where will you post it around the facility and website?
 - b. You could have someone do a more artistic version; probably whomever did your Values poster would be great.
 - c. You can use any visual — house, bus, mountain, etc., that fits your company.
2. How will you share with the rest of the staff; how much detail will you want to share about the logic behind the Pillars?
3. Do you want to re-engineer any of your current committees to use the wording we developed for each Pillar?
4. Will you want to re-align any internal departments around the new pillar concepts?
5. Will the entire board/management/leadership be responsible for finalizing the timing of all the building blocks?

Or will you assign the pillars to corresponding committees and let them finalize the flow (*this is recommended, but with ratification by the entire board or executive committee*).
6. Be sure to save the pics of your flip chart sheets to “show your work” in the future, if there are questions about why you did something.
7. Who will be responsible internally for building out a timeline for the objectives?
8. How, if at all, would you like my involvement in continuing development of the plan? I'm happy to help further, if needed.

These questions will keep you moving! Call if you need help!



The Original BOOK — *Available NOW!*



ABIDING STRATEGIES: BUILD YOUR BEST BUSINESS FOUNDATION

*Available through:
Amazon and Barnes & Noble*

AbidingStrategy.com

LISA H. HARRINGTON
ABOUT THE AUTHOR

Lisa has over 35 years' experience in leadership, including many years in the C-suite as CEO, COO, CMO & EVP and more. Specific areas of experience include strategy planning, vision mapping, corporate alignment to strategy, culture change, executive coaching, management and operations. She has earned eight certifications: CPCU, CAM, CRIS, CAE, AAM, AAI, AIAM and AIP. Her B.A. degree in Management and Spanish was earned at the Miller College of Business at Ball State University.

She values Truth, Friendship, Service & Grace and is a regular contributor to several magazines, a leader on her church council, and an animal welfare advocate.

She resides near Ft. Worth, TX with her husband and many four-legged loved ones.

Additional Publications & Where to Follow Lisa



**TAKING IN STRAYS:
Leadership Lessons From
Unexpected Places**

*(Softback & Kindle available
through Amazon.com)*

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