JEFF SHANNON FACILITATION

STRATEGIC PLANNING SIMPLIFIED

# PUT THE PLAN TO WORK

Ten moves for everyone who was in the room. You run your action. Nothing here waits on anyone else to set up a process around you.

## THIS WEEK *before the final plan lands*

1. **Block an hour to think.**
   Put 60 minutes on your calendar each week, starting this week. Reread the plan, work your action, read something from the list. Not email. Thinking.

2. **Confirm your 90-day action.**
   Find your name on the 90-day poster. Write your action and its due date somewhere you will see it. If you do not drive one, pick the one you will support.

3. **Look at your own work.**
   List what you and your team are working on. Mark each item: supports a Sacred 5 Priority, neutral, or conflicts. Do not stop anything yet. Just see it.

What to say to your team right now: we focused, we are not starting over, the strategy becomes part of how we operate, more in two weeks. Hold the specific choices until the plan is final and the talking points are aligned.

## WHEN THE PLAN LANDS *about two weeks out*

4. **Use the shared talking points with your team.**
   Once the team has aligned them, every leader gives the same five answers in their own voice. Same message, your words.

5. **Drivers: hold your first working session.**
   If you drive a 90-day action or a priority, gather the people who will do the work and build your one-page priority plan together. The driver guide, Lead Your Priority, has the plan and the first session agenda.

6. **Reprioritize your work.**
   Go back to your list from move 3. With your leader, decide every neutral and conflicting item: stop, finish and close, narrow, or defend. The time you free here goes to the priorities.

7. **Print the plan and carry it.**
   Fold it, carry it, pin it where you sit. Before any meaningful decision, open it and ask: does this get us closer to the summit, or further from it?

## EVERY WEEK *for the rest of the quarter*

**8** **Check in with yourself every week.**

Ten minutes, same day each week. Is my action on track, at risk, or stuck? What did I do this week that moved a priority? What decision did I run through the lens? One line each.

**9** **Check in with your support team every two weeks.**

The people who help you deliver your action. Twenty minutes, the agenda below. If your organization adopts a formal rhythm from the host, fold this into it. Until then, you run it.

**10** **Say "I'm stuck" early.**

Tell the person you report to the week it happens, not at the end of the quarter. A stuck action gets an owner and a next step the same day. A hidden one costs the quarter.

## THE TWO-WEEK CHECK-IN *the agenda for move 9: twenty minutes, four parts, same order every time*

**3 MIN**
**Where we are**
Each person, one sentence: on track, at risk, or stuck.

**7 MIN**
**What changed**
One thing each of you noticed that the plan should know about.

**7 MIN**
**What is in the way**
Name the obstacle. One next step, one owner.

**3 MIN**
**Next**
Confirm the next date before anyone leaves.

### KEY DISCUSSION QUESTIONS

- What did we do in the last two weeks that moved our action forward? What did we do that did not?
- What has changed around us, with customers, competitors, or inside the organization, that should change how we work?
- What are we doing that competes with the priority for time? Could we stop it, narrow it, or hand it off?
- What decision are we avoiding because the answer creates work or conflict?
- Who outside this group needs to know what we are doing, and who has heard it from us?
- Does what we did this week get us closer to the summit, or further from it?

### ONCE A MONTH, ADD

- Is our action still the right action, or has the plan taught us something?
- Pick one set from the strategic questions on page 7 and work it for ten minutes.

### MY PART

My 90-day action _____

Due _____

I report to _____

My support team _____

My thinking hour _____

*The workshop created energy. The next 90 days decide whether that energy becomes momentum.*

# YOU BUILT THE PLAN.
# NOW PUT IT TO WORK.


© 2026 JEFF SHANNON FACILITATION

# LEAD THE CLIMB

The ten moves are what you do. These pages are who you become while you do them. A plan reaches the summit when the people in the room think like strategists, repeat the plan until it sticks, and lead the people around them through the change one at a time.

## FOUR SHIFTS *small changes in how you show up*

1. **From reporting to thinking.**
   Your team has enough status. What the plan needs is your judgment. In every check-in and every meeting about the plan, bring one observation and one question, not an update.

2. **From "what is on my plate" to "what moves the plan."**
   Each Friday, look at where your hours went and ask how many of them touched a Sacred 5 Priority.

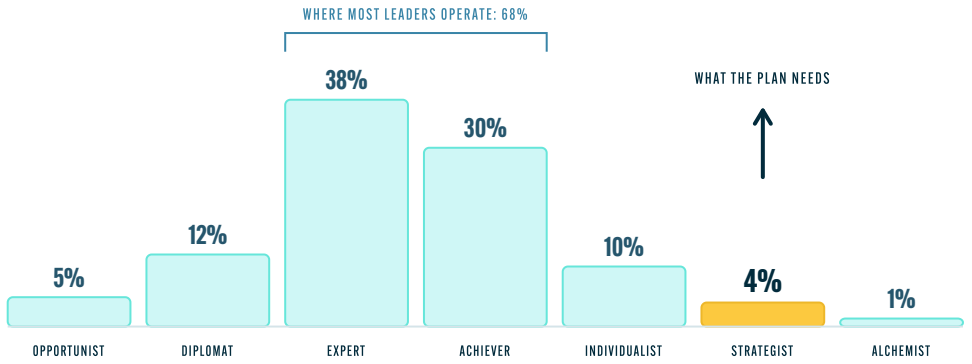
3. **From agreeing in the room to saying it outside the room.**
   The strategy only exists where it is repeated. If your team cannot say what we chose, the choice has not landed yet.

4. **From stopping quietly to stopping out loud.**
   When you drop something because of the plan, say so and name the priority it protects. That is how the Do Not Do list becomes real.

*Does the decision I am about to make get us closer to the summit, or further from it?*

The decision lens. When the final plan arrives, print it and carry it. Before any meaningful decision, a hire, a project, a request, a yes, open it and ask the question. The plan is not a document you finished. It is the guide you climb with.

## THE SEVEN TRANSFORMATIONS *a way to see your own leadership*



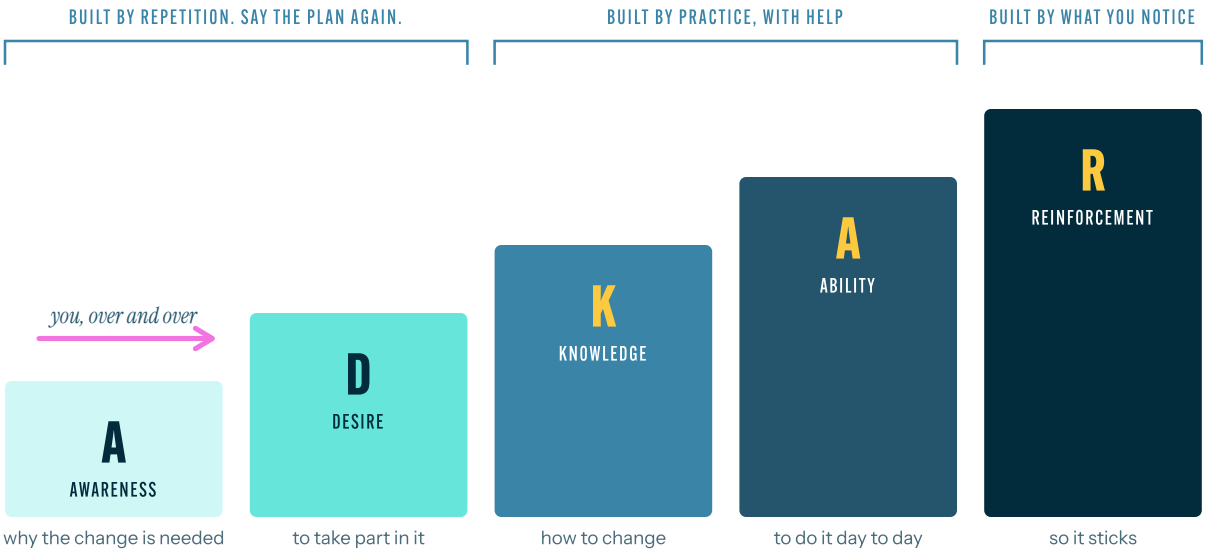

Share of leaders at each action logic, from Rooke and Torbert, "Seven Transformations of Leadership," Harvard Business Review. The figures are theirs; the emphasis is mine.

In the article, David Rooke and William Torbert describe seven ways leaders make sense of the world, which they call action logics. Opportunists win the moment. Diplomats avoid conflict. Experts rule by knowledge. Achievers get results through teams and are good at it. Individualists question the rules. Strategists see the system, hold the long view, and bring others through change. Alchemists reinvent organizations. In their sample, about 7 in 10 leaders operate as Experts or Achievers. Roughly 1 in 25 operates as a Strategist.

The useful part is not the labels. It is that leaders can move from one logic to the next, and the move usually comes from new practices, not new information. Repeating the plan, leading one person at a time through the five steps above, and stopping work out loud are those practices. Read the article in your first thinking hour and ask one question: where am I now, and what would one step toward the Strategist look like this quarter?

# ONE PERSON AT A TIME

A strategic plan is a change. The organization adopts it only when the people in it do, individually, each at their own pace. The most useful map of how one person changes is the ADKAR model, developed by Jeff Hiatt at Prosci. Five things, in order. A person needs all five, and they need them in this sequence.




Leaders skip to Knowledge: the plan, the training, the instructions. Awareness and Desire come first, and they are built by repetition.

## REPEAT THE PLAN. THEN REPEAT IT AGAIN.

The first time you say the strategy, people hear noise. The fifth time, they hear words. Somewhere around the tenth time they understand it, and after that they start to believe you mean it. You will be bored of the talking points long before your team has heard them. Boredom is the signal that you are roughly halfway there. Say it in meetings, in one-on-ones, in the hallway, in your written updates, and when you make a decision, say which part of the plan drove it.

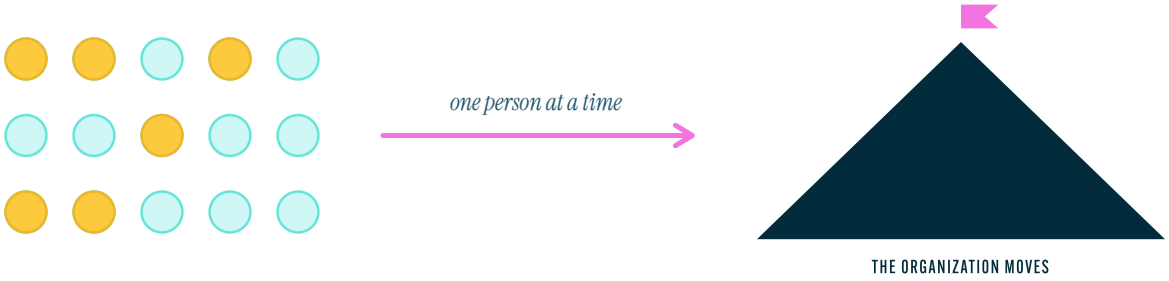
**A** — **Awareness**
Tell people why, not just what. What is changing in our world that makes the old way a risk? Say it in your words, with a reason they can repeat to someone else.

**D** — **Desire**
Desire is personal. For each person, what does the plan make better, and what does it cost them? Ask. Listen. Do not argue someone into wanting a change. Make the reason visible and let them decide.

**K** — **Knowledge**
Now the how. What will this person do differently on Tuesday? Show them, do it with them once, and point them at the one-page priority plan if they are part of a priority.

**A** — **Ability**
Knowing and doing are different. Ability takes practice, time, and permission to be clumsy at first. Clear the old work that competes for their hours. Remove the obstacle they tell you about.

**R** — **Reinforcement**
What you notice is what repeats. Catch people doing the new thing and say so, in front of others. When the old habit comes back, name it the same week, kindly.




Your job as a leader is to know where each person on your team is on the five steps, and to meet them there. The barrier is usually earlier than you think.

### THREE QUESTIONS TO ASK YOURSELF ABOUT EACH PERSON ON YOUR TEAM

- Can they say why we are changing, in their own words? If not, that is Awareness, and the answer is to say it again, to them, directly.
- Do they want to? If not, that is Desire, and the answer is a conversation, not a memo.
- Do they know what to do differently next week, and have they done it once? If not, that is Knowledge and Ability, and the answer is to show them and clear the way.

## BOOKS

### Good Strategy Bad Strategy *Richard Rumelt*

The clearest book on what strategy is and is not. Rumelt's test is simple: a real strategy has a diagnosis of the challenge, a guiding policy for dealing with it, and a set of coherent actions that follow. Everything else is what he calls bad strategy: fluff, goals dressed up as plans, and a refusal to name the real problem. The plan you built in the room passes his test. This book shows you why, and gives you the language to defend it when someone asks for a longer list of priorities.

### The 4 Disciplines of Execution *Chris McChesney, Sean Covey, Jim Huling*

The honest book about why plans die. The authors call daily work the whirlwind, and the whirlwind always wins against a strategy that is not protected. Their answer is four disciplines: focus on a very small number of goals, act on the measures you can influence this week rather than the results you will see next quarter, keep a visible scoreboard, and hold a short, regular accountability rhythm. Your ten moves are a version of this. The book is the long form, with the stories of teams that made it stick.

### Switch *Chip Heath and Dan Heath*

The book to read before you try to bring anyone else along. The Heaths borrow a picture of a rider on an elephant: the rider is reason, the elephant is emotion, and the path is the environment. Change fails when you only talk to the rider. Their advice is to give the rider clear direction, give the elephant a reason to care, and make the path easier than the old one. Their most useful idea for you is to find the bright spots: where is the strategy already working in your team, and how do you do more of that?

### The Advantage *Patrick Lencioni*

Lencioni's argument is that organizational health, meaning a cohesive team at the top and clarity that everyone shares, matters more than being smart, and that most teams underinvest in it because it feels soft. The middle of the book is a set of questions a team should be able to answer the same way (why we exist, what we do, how we behave, what matters most right now), and the discipline that follows is overcommunication: say it seven times, in seven ways, until you are tired of it and they are just starting to hear it. If you are wondering whether you have said the plan enough, you have not.

### Essentialism *Greg McKeown*

Less, but better. McKeown's premise is that almost everything is noise and a few things matter enormously, and that saying yes to the noise is the quiet way plans lose. His rule for deciding is blunt: if it is not a clear yes, it is a no. The book is a sustained argument for trade-offs, and for making them on purpose instead of by default. Read it when the audit in move 3 shows you a long list and you cannot see how to shorten it.

### Atomic Habits *James Clear*

Clear's claim is that you do not rise to the level of your goals, you fall to the level of your systems. His method is to make a habit obvious, attractive, easy, and satisfying, and to attach a new habit to one you already have. That is exactly how the hour you blocked to think survives: same slot, right after something you already do every week, with a visible record of the weeks you kept it. The book also explains why a one-line weekly check-in with yourself works better than a long monthly one.

### Lead Engaging Meetings *Jeff Shannon*

Mine, so take the note with that in mind. The book is about designing a meeting so the people in the room do the work, instead of watching the leader do it. Participation is not a nice-to-have; it is how decisions get owned. If you run the two-week check-in or lead a priority, the ideas on structure, timing, and getting every voice in the room are the ones you will use most.

GO DEEPER

# READ, THEN LISTEN

None of this is required. All of it is useful. Pick the one that matches the move you are stuck on and read it in the hour you blocked to think. One editor's note on each.

## ARTICLES *all three in Harvard Business Review*

**"What Is Strategy?"** *Michael Porter, Harvard Business Review, 1996*

Still the one article to read on the subject. Porter's distinction is between operational effectiveness, which is doing the same things better than rivals, and strategy, which is doing different things or the same things differently. Operational effectiveness is necessary and never enough, because competitors copy it. Strategy means choosing a position, accepting the trade-offs that come with it, and fitting your activities together so the whole is hard to imitate. His most quoted line is that the essence of strategy is choosing what not to do. Your competitive advantage and your Do Not Do list are both answers to Porter.

**"Seven Transformations of Leadership"** *David Rooke and William Torbert, Harvard Business Review, 2005*

Described above. The reason to read the original is the detail on the Strategist: how they handle conflict, how they treat organizational constraints as something to redesign rather than obey, and how they develop the people around them. The article also makes the case that moving from one action logic to the next is possible and usually triggered by a new practice, a new challenge, or a mentor who operates one step ahead. Read it with a pen.

**"Leading Change: Why Transformation Efforts Fail"** *John Kotter, Harvard Business Review, 1995*

Kotter watched a hundred companies try to change and wrote down the eight ways they failed: no sense of urgency, no coalition powerful enough to lead, no vision, undercommunicating the vision by a factor of ten, leaving obstacles in place, no short-term wins, declaring victory too early, and never anchoring the change in how the organization works. Read it as a checklist for the next 90 days. The one about undercommunicating is the one most teams fail first.

## PODCASTS *for the drive, the run, or the dishes*

**HBR IdeaCast** *Harvard Business Review*

About twenty minutes, one guest, usually the author of the article or book you meant to read. It is the most efficient way to get the main idea of a serious piece of management thinking without pretending you will finish the book. Search the archive for Rumelt, the Heaths, and Lencioni and you have three episodes for three thinking hours.

**Coaching for Leaders** *Dave Stachowiak*

Practical, calm, and consistently about the real work of leading people: giving feedback, running a meeting that goes somewhere, delegating without disappearing, handling the colleague who will not get on board. Stachowiak asks good questions and lets his guests answer them. If the strategy part of your job feels clear and the people part does not, start here.

**WorkLife with Adam Grant** *TED*

Grant is an organizational psychologist who is interested in how teams think, argue, and change their minds. The episodes on rethinking, productive disagreement, and the difference between a culture that values candor and one that only says it does are the useful ones for a team that just made hard choices and now has to keep making them. Entertaining enough for the drive, substantive enough to bring to the check-in.

CHEAT SHEET

# THE STRATEGIC QUESTIONS

Ask the same questions every quarter. The questions do not change. The answers do. Work one set a month in your check-in, or bring them to any meeting about the plan.

## THE SUMMIT QUESTION

*Does the decision I am about to make get us closer to the summit, or further from it?*

## THE SEVEN QUESTIONS

*The plan you built answers these. Reread them when you reread the plan.*

1. What situation are we really in?
2. What mountain are we climbing?
3. What is our scope?
4. What is our competitive advantage?
5. What are our Sacred 5 Priorities?
6. What could derail this plan?
7. What must happen in the next 90 days?

## CUSTOMERS

*Work one set a month*

- What has changed in our customer's world that we are underestimating?
- What job are customers really hiring us to do, and where are they still struggling after they hire us?
- Which customer would we fight hardest to keep, and what does that tell us about who we are really built to serve?
- Where are we making the customer work too hard to get value from us?
- What customer problem are we solving today that may not matter three years from now?

## COMPETITION

*Work one set a month*

- Who is winning the customer's next dollar, next hour, or next decision, even if we do not call them a competitor?
- Where would a competitor attack us if they understood our business as well as we do?
- What would have to be true for a customer to choose someone else and feel good about it?
- Where are we competing on terms that make us more like everyone else?
- If we were trying to beat ourselves, what would we do first?

## COMPETITIVE ADVANTAGES

*Work one set a month*

- What do we do that customers value, competitors struggle to copy, and we can keep making stronger?
- Which advantage is real because the market rewards it, not because we are proud of it?
- What advantage are we assuming we still have because it used to be true?
- Where are we merely good, and where are we meaningfully hard to beat?
- If we had to build one advantage stronger than all the others, which one would create the most leverage?

## CAPABILITIES

*Work one set a month*

- What must we become unusually good at to make the strategy work?
- Where does our ambition exceed our operating system?
- What system, standard, skill, or habit would make execution easier every quarter?
- What capability are we trying to compensate for with heroics?
- Where are we depending on a person when we need a repeatable system?


© 2026 JEFF SHANNON FACILITATION