



The 4 Disciplines of Execution

Achieving Your Wildly Important Goals

by Sean Covey, Chris McChesney and Jim Huling

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Take-Aways

- Implementing strategy amid the “whirlwind” of daily work is difficult.
- Identify your firm’s goals by detecting which changes would exert the greatest impact.
- The “4 Disciplines of Execution” (4DX) is a strategic process for achieving “wildly important goals” (WIGs).
- Discipline 1 teaches you to set a target. To achieve a WIG, define a measurable, specific time frame based on getting from one place to another by a set deadline.
- Discipline 2 identifies activities that provide the greatest leverage for achieving the WIG.
- “Lead measures” are actions that affect the outcome, while “lag measures” report the success of past activities.
- Discipline 3 calls for visible scoreboards that show how team members are performing.
- Discipline 4 instills accountability through weekly meetings called “WIG sessions.”
- The roll-out process includes extensive training for leaders and employee coaching.
- The 4DX principles also work well in helping you achieve personal goals.

Rating (10 is best)

Overall

8

Applicability

8

Innovation

8

Style

7

Relevance

What You Will Learn

In this summary, you will learn: 1) Why many companies experience a gap between strategy and execution, and 2) How to bridge that gap by using the “4 Disciplines of Execution” framework.

Recommendation

Strategy without an effective method of execution is worthless, no matter how good it looks on PowerPoint. Chris McChesney, Sean Covey and Jim Huling – all FranklinCovey consultants – provide managers with a process for realizing “wildly important goals.” They offer a simple yet effective four-step formula for execution, from goal setting to application and accountability. Although the concepts are basic, the clear instructions for implementation make this book a standout. Unfortunately, some of the content verges on being too promotional of FranklinCovey’s training, services and products. Setting this foible aside and focusing on the good stuff, *getAbstract* recommends this clear strategy manual to all business leaders.

Summary

Strategy Blockers

Executives implement some strategies easily with a single order. They initiate such changes as designating investments, revising compensation or hiring additional staff simply by asking the appropriate managers to make it happen. However, more ambitious strategies require people to change their behavior, which is seldom easy. For example, if you ask your sales team to use new software when they already like what they’re using, you’ll hit resistance even if the new program is compatible. As Jim Stuart, an originator of the “4 Disciplines of Execution” (4DX), stated, “To achieve a goal you have never achieved before, you must start doing things you have never done before.” Resistance to change is a major hurdle in implementing a new strategy.

What else causes poor execution? Employees fail to implement strategy, first, because they often do not understand their organization’s goals. In one survey, most frontline people could not reiterate what their firm’s executives identified as its top three goals. In addition, employees said they rarely felt committed to a goal even when they knew what it was. Or, if they knew about the goal, they didn’t know how to contribute toward its fruition. And in most cases, managers didn’t hold workers accountable for making progress toward company objectives.

Another obstacle to implementing strategy is the “whirlwind” – that is, “the massive amount of energy that’s necessary just to keep your operation going on a day-to-day basis.” Simply keeping up with daily demands takes most people’s time and energy. Achieving big goals in addition to staying on top of business is difficult. The four disciplines of execution will enable you and the teams in your company to execute important goals even as the work world swirls around you.

Discipline 1: “Focus on the Wildly Important”

Select one or two exceptionally crucial goals. Examine the abundance of good ideas. Then take on the challenge of saying no to some so you can concentrate your company’s

“When you execute a strategy that requires a lasting change in the behavior of other people, you are facing one of the greatest leadership challenges you will ever meet.”

“The greatest challenge is not in developing the plan: It’s in changing the behavior of the frontline teams that must execute it while managing the never-ceasing demands of the whirlwind.”

“When a team moves from having a dozen we-really-hope goals to one or two no-matter-what goals, the effect on morale is dramatic.”

“The principle of focusing on the vital few goals is common sense; it’s just not common practice.”

“Like a compass, the WIG provides clear, consistent direction toward a result that’s wildly important.”

“Once you’ve decided what to do, your biggest challenge is in getting people to execute it at the level of excellence you need.”

time and energy on one or two “Wildly Important Goals” (WIGs) that really matter. This enables your staff to focus on the firm’s top priorities without the whirlwind blowing them off course.

To identify your WIG, ask: “If every other area of our operation remained at its current level of performance, what is the one area where change would have the greatest impact?” Some corporate WIGs emerge from the whirlwind, such as an existing activity that is underperforming or broken, like poor customer service or escalating costs. WIGs that derive from outside the whirlwind are strategic matters, like new product launches, competitive threats or fresh opportunities. Many WIGs originate from “finance, operations or customer satisfaction.” Once you’ve chosen your firm’s WIG, the challenge is to implement it throughout your organization so that each team pursues one or two WIGs that support the company’s WIG. Follow four rules:

1. **“No team focuses on more than two WIGs at the same time”** – Achieving a WIG requires a keen, undivided focus. Do not let other demands dilute your attention.
2. **“The battles you choose must win the war”** – All activities must work toward accomplishing the WIG.
3. **“Senior leaders can veto, but not dictate”** – Middle managers must determine how their teams will support the WIG. If they set up a top-down process, their teams won’t feel high levels of commitment to the WIG.
4. **“All WIGs must have a finish line”** – State the finish line by using the WIG formula “from X to Y by when.” This declares that the organization will progress from this point to that point by a set time. WIGs must have a clearly defined, measurable and targeted achievement completed in a specific time frame. For example, “Increase...annual revenue from new products from 15% to 21% by December 31st.”

To implement Discipline 1, determine the best WIG for your business. Seek input at every level of your organization. Encourage ideas from each team by asking which facet of its work needs most to be improved and what the team’s “greatest strengths” are in terms of putting them to use in attaining the WIG. Rank the resulting suggestions by importance. Test the top-ranking concepts by asking if each proposed goal is measurable, achievable and specific to its team. Make sure it supports the companywide WIG. Choose ideas that test well and meet every condition. Then put them into the WIG formula (from X to Y by when) in the simplest terms beginning with a verb, such as, “Raise annual inventory turn rate from eight to ten by fiscal year end.”

Discipline 2: “Act on the Lead Measures”

This discipline identifies the actions that will give your firm the most leverage toward achieving its WIG. In this step, each team delineates specific activities with measurable targets that will move it forward in reaching its WIG as part of reaching the firm’s WIG.

Apply two kinds of measures to gauge your progress: “Lag measures” report whether you’ve completed a goal by computing your success after you act. Consumer satisfaction reports and revenue calculations are examples of lag measures. Unfortunately, by the time you receive the results of lag measurements, you have already completed the activities they cover. “Lead measures” are more within your control. While a lag measure might report your car’s repair record, a lead measure might note how much routine maintenance you’ve done to prevent repairs. Thus, lead measures can be predictive and can influence lag measures.

"If you're leading people, right now you are probably trying to get them to do something different."

"Without involvement, you cannot create the high levels of commitment that execution requires."

"What you ultimately want is for each member of your team to take personal ownership of the commitments they make."

"People will work hard to avoid disappointing their boss, but they will do almost anything to avoid disappointing their teammates."

Younger Brothers Construction identified reducing accidents and injuries as its WIG. Management ascertained that enforcing strict compliance to safety standards in six areas would provide the best lead measures for reducing accidents. Managers required shift supervisors to check their crews' adherence to specific standards daily, in spite of constant whirlwind distractions like shipping delays, vendor issues or foul weather. Within months of focusing on lead measures, the firm's safety record, according to its lag measurements, improved radically.

To implement Discipline 2, determine which lead measures have the highest impact on the WIG. Consider what new actions you can take, how to leverage your team's strengths and where you can improve its weaknesses. Rank ideas by importance and ask these questions about each one:

- **"Is it predictive" and "influenceable?"** – Both these traits are essential.
- **"Is it an ongoing process" or a one-time event?** – Work toward a continuing effort with a goal.
- **"Is it a leader's game or a team game?"** – Give the game to the team.
- **Is it measurable and "worth measuring?"** – Measurements create motivation.

Once you determine the top activities, commit the list to paper in specific, measurable terms. Make each person accountable for taking a planned action by a set time.

Discipline 3: "Keep a Compelling Scoreboard"

Telling staffers exactly how they are performing creates engagement and dedication. Scoreboards drive action, promote problem solving, and boost energy and intensity. When you show progress visually, people feel excited. Seeing that they are winning is very motivational. An effective scoreboard meets these criteria:

- **"It has to be simple"** – The scoreboard must indicate clearly where the team is and where it needs to be.
- **"It has to be visible to the team"** – Computer data may help managers but lots of information alone won't motivate the team. Put the scoreboard where everyone sees it.
- **"It has to show lead and lag measures"** – Viewers must be able to see quickly the result they want to reach (lag measure) and what they can do to attain it (lead measure).
- **"It has to tell you immediately if you are winning or losing"** – The scoreboard must communicate at a glance how participants are performing.

To put Discipline 3 into action, work with your team members to design a large, visible players' scoreboard. Participants will be more invested if they participate in creating the scoreboard. First, choose what type of graph you want to display, whether it's a bar chart, a pie chart or an X/Y axis diagram. Keep it simple, clear and easy to read, so you can display lead and lag measures. Update the scoreboard weekly. You will see that "people play differently when they are keeping score."

Discipline 4: "Create a Cadence of Accountability"

The discipline of accountability keeps WIGs from blowing away in the whirlwind. Create a sense of personal responsibility through weekly WIG meetings that follow a set agenda and that concentrate only on the status of the execution of the big goal.

WIG meetings have three components: First, participants report on the status of their commitments. Next, they "review the scoreboard" and discuss what is working and what they should adjust. Then they define what they need to achieve by the next session.

"The whirlwind is urgent, and it acts on you and everyone working for you every minute of every day."

"Basically, the more you try to do, the less you actually accomplish."

"The challenge is executing your most important goals in the midst of the urgent!"

"The real enemy of execution is your day job!"

These meetings are great motivators because, in addition to being accountable to their boss, employees are accountable to each other, which is more inspiring. "WIG sessions" promote creativity and innovation because teams collaborate to overcome obstacles. As they work on advancing the lead measure, they share experiences and ideas and bring out the best in each other. In action, "the WIG session is like an ongoing science experiment."

For the purposes of implementation, these sessions should not cover anything but the status of your WIG. The meetings work best when you hold them at the same time and place, on the same day of each week. Keep them to a half hour. Leaders should set an example by reporting on their WIG commitments each time. Together, teams commemorate successes, share what they've learned and help each other overcome obstacles. Keep the whirlwind out of your WIG sessions.

4DX Installation

To ensure that 4DX is successful in your organization, put it into operation as an ongoing process, not a one-time occurrence. Involve all your firm's leaders and their teams, rather than working with just a few leaders at a time. Train your managers to head this effort. To roll out 4DX in your company, follow this tested, results-oriented six-step process:

1. **"Clarify the overall WIG"** – Follow the 4DX procedure for identifying your company's wildly important goal.
2. **"Design the team WIGs and lead measures"** – Commit two days to training leaders in the concepts of 4DX. Once leaders have absorbed these ideas, they can work with their teams to identify WIGs that support the organization's WIG. These managers should define the lead measurements they'll need to put in place.
3. **Run a "leader certification" workshop** – Teach leaders how to create a scoreboard, manage a WIG session and prepare for launching 4DX within their teams.
4. **Conduct a "team launch"** – Kick-off 4DX in two-hour team meetings. The agenda is to teach the 4DX principles, review the organization's WIG and describe the lead measures. Conclude the meeting with a practice WIG session.
5. **Execute "with coaching"** – Once you've launched 4DX, stay on track and work through problems with the help of a coach who has expertise in the four disciplines.
6. **Organize "quarterly summits"** – Leaders report to upper management in quarterly meetings. This gives them the opportunity to practice accountability and receive recognition for their successes.

4DX in Your Life

The four disciplines are not only an effective tool for accomplishing goals in the workplace. You can apply the same principles in your personal life. One man used 4DX to lose weight. His WIG was to lose 80 pounds by his son's high school graduation six months away. He identified his lead measures as walking several miles daily, limiting calories and not eating in the evenings. He kept a tracking chart on the kitchen wall, and he reached his goal in time for his son's graduation.

About the Authors

Chris McChesney, a developer of the 4DX program, and **Jim Huling**, who has more than 30 years of experience in corporate leadership, are both consultants with FranklinCovey, where **Sean Covey** is an executive vice president and runs global operations.