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Welcome back, everybody to ProductivityCast the weekly show about all things personal productivity. I'm Ray Sidney-Smith.

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And I'm Augusto Pinaud.

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I'm Francis Wade.

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And I'm Art Gelwicks.

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Welcome, gentlemen. And welcome to our listeners. This week, we are starting a new ongoing series on ProductivityCast that we're calling book cast. And so book cast is where we're going to bring a new productivity book Well, a new to, hopefully you productivity book, but it could be an old book as well, that we're reading. And we want to discuss the merits and demerits of the material. I'm hoping that we each come at the material from different backgrounds and experiences, and therefore some of us will love and some of us will potentially not love the material, and that will make for an enlightening discussion for you. For our first book cast, we bring you the four Disciplines of Execution, achieving your wildly important goals by Chris McChesney, Sean Covey, and Jim Huling. I have been recommended this book so many times. And so I wanted to bring this book to productivity cast to dive into the major tenants and discuss them. So a little bit about the book First, the book is described on Amazon and pulling this from the Amazon description page. It says, Do you remember the last major initiative you watch die in your organization? Did it go down with a loud crash? Or was it slowly and quietly suffocated by other competing priorities? By the time it finally disappeared? It's likely no one even noticed what happened. Often the answer is that the quote unquote whirlwind of urgent activity required to keep things running day to day devoured all the time and energy you needed to invest in executing your strategy for tomorrow. And then it goes on to say that the four Disciplines of Execution can change that forever. It says the four Disciplines of Execution are for dx is a simple, repeatable and proven formula for executing your most important strategic priorities in the midst of the world win. And that includes the four disciplines being focused on the wildly important act on lead measures, keep a compelling scoreboard create a cadence of accountability. And so with that, the authors are Chris McChesney, Sean Covey, and Jim Huling. Sean Covey is not only notably the son of the late Dr. Stephen Covey, but he is also the senior vice president of innovations and products at Franklin Covey. And so he has been at the Franklin Covey company for quite a while. And obviously, he's the author of many other books, and obviously helps with his father's company. Chris McChesney is the global practice leader of execution for Franklin Covey. And he's, of course, one of the primary developers of 40x. And then Jim Huling is the managing consultant for Franklin Covey's four dx delivery of that material across the world. So he's he's responsible for the 40x methodology and the quality of the worldwide delivery. So those are the author's that's a little bit about the book. And as I noted in our lead up, the book is divided into four parts. What the methodology is 40x is broken up into four parts. And so I thought we would kind of have our conversation in those four parts. The book itself is designed in, it was designed in three sections, they go into the four Disciplines of Execution, then they talk about installing 40x, with a team, and then installing it on the macro level and installing 40x in your organization. But I think for our purposes, since we're going to talk about this kind of on the personal productivity level, we could talk about this on the four disciplines, each individually. So where do we want to get started with the conversation? Let's start with focusing on the wildly important, let's talk about what they mean by that and what wildly important goals are. And we'll go from there.

Francis Wade 4:23

I actually spent this past weekend working with a fertilizer company to develop their strategic plan. And one of the challenges my clients always grapple with is how do you separate that which is essential from that which is nice to have. And most strategy documents that I've read have done by other consultants with their clients look like mega Long, long laundry lists so they're like everything and the kitchen sink. And as you go through the kitchen sink, after the fact, you have a really hard time. Figuring out just what the strategy is you can see that they're doing 30, they want to do 30 things. But the 30 things don't actually fit together. In any kind of coherent, they don't tell a story. They don't provide a rationale or reason. They don't, they don't reveal what, what what Kaplan and Norton called a strategic hypothesis, which is the idea behind the strategy, they just look like a lot of stuff to do. And to give him what the author say, if you can find the and I'll go a step below, just saying what's wildly important, what's, what's the wireless, most important thing is, what's the hypothesis and the sequence of core activities, and how they fit together, and how you describe them to other people. That blob of information, which gets created come get created, doing a retreat is the most important. And it's got to be separated at all times from everything else that's nice to have, or everything else

Art Gelwicks 5:58

that's kind of emergent, for instance, brings out a really good point of the separation of critical versus desirable. But I think in a lot of cases, especially when we start to look at it at the personal level, those critical items aren't coming from us. They're coming from outside factors. And that becomes a significant weighing on how do you make that decision? Is it really your call in those cases, and that's, that sets the drive on what you need to focus on. A lot of the initial text focuses on development of the strategy, and then the execution of the strategy. Well, from a personal productivity standpoint, I think a lot of us don't have control over that strategy part. That strategy is getting defined for us by external forces. If you have not only just work things, but you have, say, kids that have to go to college, you have bills to pay, things like that become those wildly important goals. Because if you don't do them, nothing else really happens. So I think quantifying it around that around what's, what's the critical, what's the desirable. And then honestly, not excluding all the desirable things, when I work with clients in the corporate space, will go through and define a list of requirements on a project and I go through the same exercise, what do you need to have, what do you want to have, I always tried to include a couple of the once into the overall need listing. Because it makes, it makes the overall execution more effective. Those are the things you can say, look, it's just going off the rails, we just need to pull a couple things out, you can pull the ones out, and not affect the needs, and still have everything meet the requirements. So I think the focus on the wildly important is critical. But I also want to make sure that people don't put blinders on the fact that it must be only those things, you still have to keep a holistic look.

Raymond Sidney-Smith 8:11

And all those heels, I think the author's premise is that the world around us the what they call the World Wind is kind of our daily lives, our daily activities are our day jobs that are in essence kind of forced external forces or pressures on us, to distract us from these things they called wildly important goals. And I'm really curious about how they design the wildly important goals. And from, from my perspective, how do you make the list right and so in pursuit of an important goal, you have to narrow down that which is not important that which is important, but not important enough to be this wildly important. This kind of stage it up a level to this highly important, they're adding a modifier to important to make it more and that that was the part that I couldn't quite grok as well is the defining piece between. If it's important, it's important, if it's wildly important, it's kind of sets itself above other things. And if you think of, say Greg McKellen's essentialism or even the bullet journal method, by writer Carol, there is there is it's vital, and it's to be done, or it is not to be done. And I can see the difference between gradations I'm not I'm not that black and white of a thinker. But the wildly important goal, didn't know necessarily speak to me as being more important than anything else. But I

imagine that if you're in an, in an environment, and as a, as a team, as a leader, this book is really designed for leaders. So if you're a leader, you know what the standard or metric is that you're trying to set for every quarter, half year, annually or otherwise. And so the wildly important goal, I'm presuming should be the project that's going to help you hit those metrics, or go beyond those metrics in some way, shape or form. I don't know I just I don't feel as though the the wildly important goal necessarily spoke to me as much in terms of, of that the methodology as a whole, which is choose a goal and work toward execution on that goal that speaks to me, but the, you know, that whole like, be hag and wildly important goal. It just sounds like acronym soup.

Art Gelwicks 11:03

Yeah, I'm gonna agree with you there. Right. That was, and this is a general thing about the book. As I started going through it, I'm like, I need my management bingo card here. Because it's it. I hate to say it, but I've heard all this stuff before. And anybody who's done anything in the productivity space has heard all of these approaches before and these ideas I, I literally did not find anything new. Going through this. To me, it was a rehash of same concepts, same strategies, and things that that did not necessarily translate outside of very narrow segment of need and desire. You mentioned B hag, and anybody who hasn't heard of that one before his big hairy goal. Or hairy goal. big

Raymond Sidney-Smith 11:53

hairy, audacious goal.

Art Gelwicks 11:55

Yeah, okay. Yeah, audacious works. That's that's the word I was looking for. But it really comes down to that is typically being defined by the higher upper echelons of an organization as something to shoot for. Well, let's translate that to everyday life. I mean, how many of those goals quote goals do we create? When we start talking about wildly important, it immediately gets confused with tasks and actions and things that have to be accomplished? Well, those aren't goals. My my wildly important goal may be to get a law degree from Harvard. Okay, that That, to me sounds like wildly important. It sounds like a wild goal. But why is it so important? What's the definition and I think that's where I'm I struggle, at least in this first segment is, the terminology does not necessarily match. What they're trying to define, at least in my, in my take on it,

Francis Wade 12:57

and throw in a defense on their behalf perhaps, is that you know, they're there, they're trying to write the semi self help book. And to do that, you need to make things super, super simple. And, you know, that are super super simplification doesn't really match to real life, either at the personal level, or the corporate level, the longer the objective, or the further away the objective you define. And, you know, I work with companies to produce 30 year 30 year strategies. And we're looking at a 30 year strategy. That's a long series of interconnected activities that you need to keep your eye on. And it's, it may start with something as simple as hiring the right person for a job in the next six months, in order to execute something that's not going to bear fruit for 10 years. But it's not wildly important in the sense that if you don't hire that person, then the whole place goes to heck. But it is wildly important in the context of causing a digital transformation, for example. So they're trying to simplify something that's really complex. And they're they have, they don't really talk about really long term goals and how to how to follow the chain of activity that produces a real long term effect.

Art Gelwicks 14:21

I'm trying to force myself to stay in the lane of personal productivity, because you're right, it's it's very easy to take this in the corporate space, and apply it corporately because one, that's how it's written, but to translate to the common sense approaches within the corporate space,

but if I try and stay in the personal productivity lane, let's say for example, my wildly important goal is financial independence. That's about as broad as I can make it for an extremely long term. And yes, it is wildly important. It would free up all kinds of things. It gives all All kinds of opportunities. So I'm going to use that as my benchmark. If I'm going to define that, and then look at this first section, this first dimension of this, and the focus on that means, or the question I have is, does that means that I need to focus on that, at the expense of things that don't drive that wildly important goal, because that was one of the the other things that I read out of the text is, you got to knock the rest of this stuff out of the way, you got to focus on this one thing, this, this must be the core driver. And like, that's not totally realistic, you can't always do that, at least not on the personal side. Professionally, you can certainly say, look, nothing else is important. But personally, I don't think you have that option.

Raymond Sidney-Smith 15:52

And so to provide a little bit of, of further clarity here, what they talk about in terms of the wildly important goal is to phrase it as  $x$  to  $y$ . So going from A to B, I don't know why they went X to Y, they could just go A to B or A to Zed, but A to Zed by when So the formula is from location A to location B by when starting point to outcome and a time associated with it. So that makes a lot of sense. I think that you know the the goal is to be able to SMART goal it so to speak or smarter goal at adding evaluate and then reevaluate to the to the SMART goal perspective, I like that part of it. In an organization, this can be very difficult, depending upon the dynamics of the organization, if you are the leader of a small team, and you have the respect of that team, you have the authority to be able to exact and exert control over that team. If you have the ability to persuade that team, if you have the ability to empower that team, then yes, this is potentially useful to you. If the organization, even on the team level, is dysfunctional in any capacity, then it's very difficult to make 40x work, because the strategy is is sound, potentially, but the execution is not going to work in that particular environment. And that's the part that I'm, we were talking before we started recording about doing this in a family environment, and the potential woes of how that could that could go off the rails. And I think about that, because families aren't, are, are dynamic creatures. And they are organized around usually, you know, if you have children raising those children, and they're in different states of development. And I think about that, in terms of so many organizations that I come into contact with on a weekly basis, where they're their startup businesses, they're going concerns, their businesses that are in the, you know, autopilot mode, potentially, their businesses that are are in traction and are responding to outside forces that are that are, you know, potentially hurting the company dramatically. And so they're, they're, they're these organic creatures that are dealing with all of these pieces. And so they're not necessarily equipped to deal with the execution. In such a, I don't know, very confined restrictive way, I'm just curious about how that all works in a, in a real life environment. And obviously, they wrote this book, you know, like, it's, it's good to, like, put this out there. Because in the, in the outline of who these authors are, they wrote this book, to sell their consulting services to large companies that can pay them to help them execute this, you know, execute on this material. So let's not forget that they wrote it with that intent in mind. And I'm sure it also helps all of us who read the book, who want to implement this ourselves, but their primary goal, of course, is to bring notoriety to the methodology, and then to teach it out there in the world. So we have to kind of put it through that lens as well. And to your point earlier, Francis, I know you talked about them, kind of writing it very simply because they want to make it generally available. I actually also look at it from the opposite side, which is that you could write something like getting things done, which is a highly complex methodology, and put that out into the world. And so you have kind of two ways of positioning that in, in that in the space. If you're trying to sell coaching or consulting services, you can, in essence, do everything in the kitchen sink, which overwhelms people and makes them want to hire you for you know, services to be able to help implement it. Or you can do what they've done here, which is try to put kind of this highly simplified version out there, knowing that there are probably some missing pieces, and then you seek them out for filling in the gaps for being able to get the details of how to actually make them thing happened.

Francis Wade 20:02

I agree with your analysis there. Let's apply it to the personal realm. Even even as simple. A simple objective, it would seem simple anyway, of that I've had for for the last couple decades, which is to be fluent in Spanish. So I had the opportunity to interact with a few bilingual folks inside of our company recently. And once again, I was painfully aware that I'm not fluent. And it tooks takes me all the way back to high school, where Spanish was my weakest subject. And it was one that I didn't study and the one that I didn't continue. I didn't do any Spanish at all in college. And it wasn't until I was maybe about 20 years later, that I had a project in Venezuela, in Caracas, Agusta right before, right before Chavez came in, I worked on a couple of projects there. And I realized, Oh, my God, I know, I know Spanish, I really love to learn it. And I tried to spend two weeks to be immersed, and I learned got a lot better. And then they had a change of regime. And I never went back to Venezuela. And plan to do it again, not to do another immersion program about another decade later. And then the recession came just just the right time to knock that out of the park. And I haven't picked up the Spanish since. So learning Spanish, for me, is a personal development project. If I had learned it fluently, I would have transformed my business. Was it a wildly important goal? I don't know, you know, in the context of my career, looking back, if I were able to pick it up earlier, it would have been a wildly transformative capability. But I never there. So I think there are a simplification also makes it difficult to translate something as complex as learning Spanish over a period of decades, into a simple wig, a simple, wildly important goal, because at any particular point in time, it was never wildly important. But over the period of 30 years, I can no say it would have been important if I had had an opportunity to become fluent. So the simplification, I think those drop out a lot of complexity and makes it difficult to apply.

Raymond Sidney-Smith 22:16

You're gonna make me talk about something that I try to avoid. But this actually gives a very specific analogy in my mind to how Professor Cal Newport talks about deep work, and how that term itself is very charged. Because if deep work is the work that is supposedly important. And shallow work is the work that is trivial and mundane. That's not important, you get this perception that one has value and the other doesn't. And a wildly important goal, a wig, supposedly, is going to bring you the greatest amount of impact, except that something like Spanish, which is the mundane hard work, but going back to Dr. Steven Covey, you know, he would say if you had the discipline to practice and learn piano, you have the freedom to play the piano. And it's like, it's that notion, which is that I could make a very shallow action, you know, shallow work, call, Susan takes two minutes, guess what, I now have a million dollar contract. Was that not worth doing? Was that not important to do, versus the deep work, which could have been, you know, writing a chapter in a book or something like that. So we have to always balance out the fact that sometimes the semantics of these things, they sound good in corporate speak. But in practical kind of ways, which think about our own personal productivity, the value of something has to be the outcome that we can define. It doesn't necessarily always stand on its face, that that thing is going to lead to what we want it to lead to.

Francis Wade 24:04

It's just hard to decipher what wildly important means in practical day to day activity, and you can make the wrong choice and make, you know really screwed things up just because you're trying to label something in but in a particular way, and then ignore everything else. left us doesn't present itself that way.

Art Gelwicks 24:25

And I think we can make this more usable by dropping What seems to be the operative part of this or operative problem in this, which is this phrase wildly important. If we look at the personal perspective, if you have a goal that is very important to you. Maybe it's not wildly

important, fine. It's not the terminology that's really the key. It's the fact that they're drawing out a very base level common sense approach to dealing with goals which is don't let Side activities, get in the way of the primary goal, make sure you're focused on it. I used the comment at a gaming that side quests don't advance the main adventure. You can spend days and days running little side quests and a computer game and never actually advanced the main story. Well, whatever your goal is, that's your main story. And you have to focus on what are the things to be able to do that. And I think this steps us into parts of the second, and the third and the fourth, that we can leverage and use to help ourselves do that. But again, I'm not necessarily convinced that any of this is new. This is just kind of a restatement of it, with enough marketing speak, wrapped around it to sell some consulting time, like you said,

Raymond Sidney-Smith 25:49

Yeah, so this does take us to their next kind of perspective on what they call lead and lag measures. And so what they're talking about here is the notion that we should be really focusing on lead measures as opposed to lag measures. And so lag measures are measures that are easily understood after the fact. And so we know that, say, in the business world, if we look at revenues, revenues are something that is very easily defined, and comes at the end of all of the work after strategy after execution, then you get a result. That's a lag measure. The lead measure, of course, are all the pieces that happened before that, that help you to be able to correct course, to be able to modify for the intended goal in leading up toward that outcome, which is, you know, maybe there's some there are some marketing metrics, there are some sales metrics, what what's happening along the funnel toward the sales and revenue, so that you can clean those things up. And they become indicators of whether or not you're on track or off track, and can better navigate you toward the the wildly important goal.

Art Gelwicks 27:07

I struggle a little bit with the concept of lead and lag, specifically because I come from a project management background for a lot of my work. And lead and lag is often conferred around time for execution. But if I look at it purely around measures, most commonly the measures you'll get are just that they're lag measures, they're reactive measures. You did X number of things to get to this end result. I'll use a great example for this habit trackers, habit trackers are a lag measure, because you're only tracking when you either did them or did not do them. They're not things that are helping to move the ball forward, or at least clear the way for for that to happen. So I was trying to come up with an analogy. And if I think about a goal of say, writing a book, a lag measure could cross identify as did I write 1000 pages? Or did I write 500 words today? Great. That's a lag measure. And I can see that. But no way does that indicate how I'm supposed to make sure that I write 500 words tomorrow. A lead measure translated into that would be allocate, did I allocate an hour of time to write 500 words, that's enabling the lag measure to actually occur and happen. And I think a lot of the times people are used to dealing with lag measures, because that's how they're measured in the real world. And unfortunately, it's a it's an unfortunate thing, that that's how people are measured, because it's always reactive. Oh, you didn't meet this objective. But there's nothing, no conversation around. Well, how do you meet this objective? And can we measure that we're actually setting you up for success? But this idea of lead measures is good. But it's alien, I think, to many, many people.

Raymond Sidney-Smith 29:02

in defining wildly important goals, I recognize something for myself, as I was reading the book most recently, and thinking about it, I thought, What is the difference between a wildly important goal and a lag measure? Ooh, there's

Art Gelwicks 29:17

a big difference there. Because a wildly important goal should never move. It should be constant, and it's not reactive. So if I say if I say like, you know, writing a book, that's a singular event, you accomplish the goal. You have a point in time where you you can turn back and say,

I've achieved it. At least this is my estimation of it. Lag measures are a constant movement you're looking to see if I use an example of traveling somewhere. I'm going to drive to Colorado. Great. The goal is to arrive in Colorado. The lag measures are the mile markers as they've gone past and I can see Oh, okay. I've gone 200 miles, I've gone 250 miles and I need to go X number of miles to get to Colorado by this time. So that's, that's an achievement that I have on progress to the goal, the lead measure would be, am I going to stop in time to get gas so that I don't get sidelined? Am I have I made arrangements to? And these are more tasks and they are measures. And this is where I'm struggling with this a little bit. But have I put the right things in place to make that goal achievable? Rather than saying, did I do those things? After the fact? And this, you can see where it's confusing for people?

Raymond Sidney-Smith 30:42

Of course, yeah, that's why I bring up the question, you know, and acting folk confused about it, because

Art Gelwicks 30:50

I'm not acting, I am totally confused. No, no, I,

Raymond Sidney-Smith 30:52

I guess I was acting a little bit poorly acting, I'm not an actor. But the the the goal here, though, is to understand the difference between those and I think it's, it's actually very difficult because you can say something like, I want to make X dollars by December 31, that could be a considered a wildly important goal, except that it's, it's really not, because it's not a transformation. The goal, of course, needs to be some kind of, I think of it, interpreting their material, and then putting that through the lens of a personal productivity, you know, putting that through the lens of personal productivity, you need to then Think, think of any goal as a transformation. And if you're the hero, or the heroine in and along that journey, then what is that? What is that transformation that needs to happen. And that becomes not just a, a, an important goal, it becomes actually one that covers a long span of time. And so I don't, I don't think of this as being Oh, we're just going to do this in a year. And that's a wildly important goal. Like with Francis's notion of learning Spanish, that is a for No offense, Francis, but for a man of your age. And, you know, that is not a part of your brain that is undeveloped, it is a fully developed part of your brain, that is going to be very difficult to learn at your age. And so, you know, a three year old is not going to have a problem learning Spanish in under a year. A, you know, any one of us now, with fully developed brains is going to have a more difficult time, we are challenged already by that reality of our biology. So the goal then, is to think what over the next four or five years, can we do to really get to some level of fluency? And what I think of is, okay, well, what is the international standards for fluency, and then working up through those grades each year, hitting one of those till you're at level five, and say, that is fluency, and then breaking those down into lead and lag measures so that you're able to get yourself to that point. And and this is really where I think about all of the fundamental importance of chunking. And breaking down into the elemental projects have any particular goal. And I think that once we get along to kind of our third and fourth principles here, they make a little bit more sense. But that's, that's really where my mind goes, in terms of lead measures,

Francis Wade 33:34

little bit of art involved in developing lead measures, because you're trying to predict what will what is a with an indicator of progress that will ultimately lead to your goals, I actually had a experience using both. In the last couple years, I lost about 12 pounds of weight. And my lag measures were weight, body fat, and the my waist size measured in inches or millimeters, you know, just with a little measuring tape around the West. And so those were my lag measures, my lead measures, the first ones I use were calorie counts. So by managing and observing and watching my my calorie intake, I use one of these small apps. And that's always worked for me. So it worked again, but by making sure that there was a deficit each day or on most days,

and by keeping my exercise program to around six days a week variables, which kind of what I've always done, but then I upped the ante and increase the intensity of my exercise. So that calorie deficit will be different. So the measurement of the calorie deficit is my lead measure. It's the predictor of what I hope would be captured at some point by my lag measures. The, that's an easy example. But for more difficult examples, like learning Spanish, for example, a lead measure could be the number of hours I spend listening to Spanish learning Spanish, practicing. immersing myself with a Spanish speaker, I could measure all these different ways, though, the reason I say this is an art is because those are perfect predictors of my fluency. They're pretty good, I think they would work some probably would work better than others, some that work for me and not for other people. But there's a bit of an art in there, because the relationship between cause and effect is perfect. However, it's still very powerful to look for a lead measure, because at least you're in the game of measuring your input, so to speak, at least you're in the game of crafting an understanding of what you need to do, or the effort required. And that game is very, there, the authors are right, that game is very powerful. And you rightly said, Ray that most people don't think in those terms, which leads them to a lot of frustration, for example, when it comes to weight loss or learning Spanish because neither of those are short term goals. And you may at all, as an older, you get the worst that gets in this exam, these two examples, you may exercise and study and not see the needle move for a while, because if all you're looking at is lag measures, you won't see any progress at first. So having these lead measures is a way to motivate yourself if you know how to craft them.

Raymond Sidney-Smith 36:37

So that takes us to our third principle in the four Disciplines of Execution, which is to create a compelling scoreboard. And what does that mean, according to me check is Nate covey and healing? Well,

Art Gelwicks 36:54

I'll tackle that because I actually that's one of the things I do all the time is build dashboards for people. That type. The compelling scoreboard is one of those things that can make or break this type of an implementation. Because often what happens is scoreboards are built around the wrong things. They're built around the obvious things. They're built around lag measurements almost all the time. And when you cross that line, and you're looking at old data, you're looking at information that maybe even it's even though only a day or two old, you've lost that time to adjust accordingly, and to make adjustments to stay on course, for your goal. So one of the things that I go through and I build dashboards is I make sure that the information that you're getting is allowing you to be to be active for the next sequence of changes that you need to make. And it has to be not only relevant, but it has to be timely. And but i think is probably the most important piece. The information that you're going to have with your scoreboard has to be simple. I've seen so many times where people will put together these massive convoluted scoreboards and dashboards and I want to look at it this way, in that way, in that way, and that way, I'm like, that's all great. Give me two things that are going to help you stay on course, if you can do that, then the rest of it's all nice. But those two measures should be the ways that you're going to turn left and turn right on the steering wheel to make sure that you stay driving down the center of the road. And their their idea of keeping a compelling scoreboard is very, very important to this. It's something that we often will forget and I'll go back to my habit tracker example. That's a really good example of having a compelling scoreboard because you can look at it right away and no are you slacking off? Are you not slack? It's a critical part of this. Unfortunately, it's often badly built and it's not giving you the opportunity to make the changes that you need when you need to make them

Francis Wade 39:07

I agree. I on a personal level. I've been building scoreboards for as long as I can remember, but I've also been frustrated for as long as I can remember because I could never create the scoreboard I really want or need. The numbers are always either scattered all over the place or



have to enter them manually, which becomes a chore which which eventually becomes an annoyance and sometimes it leads to me stopping or it's it's not a place that's visible. It's buried inside some app or some someplace I'm collecting the numbers sub experience a constant frustration around scoreboards personal scoreboards that I've never rarely do I ever had the one that I want that always making do That's been forever. And I've been dying for someone to come up with a way to put together personal scoreboards that is easy and accessible and attractive. Just practical. Actually, I guess I would settle for that at this point.

Art Gelwicks 40:16

I mean, if you look at tools, like for example, to do list to do is has a scoreboard, a basic scoreboard capability built into it, and they use a thing called karma points to figure out are you staying on track but all of that? Or should I say, none of that goes to actually solving the problems of why you're not staying on track. It's just telling you, oh, you're off track. So it's not much more important than, say, the speedometer on your car, it's going to tell you, you're going too fast. It's not telling you why you're going too fast, is it because you have a lead foot it is because you have a car problem. Those are the types of things that when we think about our dashboards and around personal goals, we have to include that as part of our strategic plan, and strategic plans. So often get defined strategy, and then we figure out how to execute? Well, to me, that's the mistake. a strategic plan needs to include the strategy of execution, what are the measures, you're going to need to be able to meet this strategy, if it's, let's say, for example, the goal is to improve your customer relationship, or your your number of tickets coming in by 20%, you know, reduce that rate, fine. If you haven't defined what those measures are, how you're going to measure them, and how you're going to react, when you're not meeting them, then you haven't created a strategy. You created a wing and a prayer that you're hoping somebody else is going to execute on. So these types of dashboards that we're talking about, these can be the linchpin to this entire thing. And so often, I think they get just kind of like, Oh, we need a dashboard. And then that's what you get.

Augusto Pinaud 42:06

There is a couple of things with the dashboards that you tie, I agree with what you saying, the problem is, from which perspective, you're, you're getting this, you're getting this perspective, from the high person in the organization that may or may not have a real connection, the real impact to just can't look at the numbers, say, oh, okay, our tickets are going up, or you are looking at this dashboard, from the person who is actually tackling these tickets. And the problem is, we tend to look at these dashboards as a unilateral thing. Okay, upper management is looking at the dashboard and, and marking down how we are getting more tickets. But they're not necessarily looking or listening to what is the reason this tickets are on increase, or in decrease on these people who are actually on the front line, may or may not get in most cases don't get a sane on the measurement or saying of why these things are happening or not happening, that make that Dutch word, completely useless in a way because, yes, it allows you to know that there is an issue, but it doesn't allow you to see, in many cases, the real costs of that issue. So you are treating on working to treat artifact, a problem. But you are not, in many cases, treating the real costs of those.

Raymond Sidney-Smith 43:36

One of the things that I think about when you look at the idea of a scoreboard or a scorecard and keeping score are a number of different things. One is that that can be rejected by certain individuals in an organization and on a team in a personal productivity system that can be anti authoritarian sentiment can kick in yourself, right? So I can, I can certainly understand times when I have felt like I've created too much structure. And then therefore I reject the structure. And we have to be cognizant of that fact that you can have this rejection of keeping score, because there's too much scoring that's too complex to keep track of it. And so therefore, you reject it from the, the overwhelming amount of work it is just to keep track. And then the other side is of course, that anti-authoritarianism that I talked about, you know, you can feel like oh

gosh, this is just too much bearing down on me. And it's too much information or it's just it feels like too much structure. And so then it's rejected out of pocket. So that's one thing that I think everybody should just pay attention to. The the other part that comes to mind is that in a group environment, the person who is leading usually has to collect and understand more data. Then the players that are looking at the scoreboard. So the players need to know very simple pieces of information. Am I winning? Or am I not winning? And by how much the, the person who's leading, though needs to take account of a heck of a lot more data? You know, if you if you take this to any sport, right, you know, you have, say baseball, you know, how many, you know, bases are loaded, you know, how many, you know, how many people are on base? How many people have have, you know, out how many people have runs, and you start calculating all of the batting average, and so on and so forth. All that's happening by somebody who's not on the field. And but the people on the field, all they're worried about, are the are the scores up on the board? And playing the game, the components of Okay, can I can I steal a bass? You know, is this is the player Up, up at that going to, you know, bunt, or are they going to, you know, take this one out of the park, we're, we're playing the game, or we're paying attention. I forget what it's that there's kind of a term for that, when you're like, you know, you're paying attention to the details around the game, you know, that color commentators do about a sport. And there's kind of like, there's that business of, of the sport, and then there's the playing of the sport. And there's a difference between those. And when you're thinking about doing this in your own personal productivity system, because that's the flavor of the way in which we're looking at this today. I think that becomes difficult because you have to kind of wear two hats.

Art Gelwicks 46:39

Oh, I definitely agree. I mean, you you need to have systems that give you a proper perspective on the data. I mean, this, here's a pet peeve that I have is I will sit down into a requirements session talking about a dashboard and I will start what I always start with the same question. So what would you like to report? And as soon as I get this answer back, my teeth start to hurt. And the answer is, well, what can you tell me? Yeah, you haven't defined anything, then. And that's the first mistake. There are lots of ways to report data. But if you don't know what you want to pull out, and its inherent value, all you're doing is reporting for the sake of reporting. And honestly, I think that's what a lot of people have a problem with when they look at things like dashboards, especially if they're on the execution side of a strategy is, are we gathering this data? Just because we can week? What are you going to do with it? how's this going to make things better? and reporting it those multiple levels? I think you're absolutely right, that you have to be able to say that, yeah, I can report, I can generate 20 different reports off of this data. But these two, these are the ones that are going to help us drive the goal. The rest are just nice to know and can help us identify ways to be more productive, more efficient, and things like that. But what are the key ones, and communicate that if from a strategy standpoint, if leadership is not communicating, why data is being captured, and what it is going to be used for, and then follow up on that. They're not doing themselves any favors.

Augusto Pinaud 48:25

And I think you're just hit on the proverbial head of that nail with many of these dashboards is that the dashboard is done same as a way to improve from from the people who is doing the execution, but as a way to get them in trouble with measurements that are impossible. I have heard that more into organizations, about the dashboards, that about how the that information that is getting to the upper levels is going to help to improve, fill in the blanks. So if your communication of why you're tracking this, on both on this is the key information that we are going to use for this and this is the information that we are trying to get. So we can make improvements. But also communicate as this is happening as you get the information as you draw the conclusions. When that doesn't happen. What the people start feeling is okay, you're tracking the information just to track the information or just to see how we can work more instead of how we can work

Art Gelwicks 49:31

better, or and I'll add the third criteria, you are only tracking this information to determine how well I can execute your strategy. And that you want to talk about that pushback. That's where I think a lot of people start to run into it. As they say, look, you know, all you're doing is trying to figure out, you're trying to come up with another stick instead of a carrot for me. And that's why I think a lot of people on the execution side look at these types of dashboards. And when we start to think about it for ourselves. We're like, we don't enjoy that part of our actual work. So why the heck would I create something that's going to act as a stick on myself? For me? I mean, why would I do that to myself, and we lose the perspective in the context of if a dashboard is current is constructed correctly, it is a roadmap, it is the GPS saying recalculating, rather than the GPS going, you turn the wrong way. It's a whole different context. And it's a whole different psychology, the

Raymond Sidney-Smith 50:36

notion that you talk about is actually really, really important and is and needs to be considered very thoughtfully. And I want us to go on go along, and continue on in the fourth discipline, while we have time. And so the fourth discipline of execution, then, is to schedule regular weekly, they talk about touchpoints, where everybody is then held accountable for progress toward the lead measures. And this is, again, the the kind of what they call a cadence of accountability, that is a regular schedule where everyone is, in a very limited time, capable of just accounting for what they've accomplished toward the lead measures.

Francis Wade 51:23

In a corporate setting this, it makes complete sense, because corporations run on accountability and accountable relationships. On a personal level, it's usually unless you have a coach, if you're fortunate enough to have that, or I suppose, usually, it's just you and you, otherwise, you're the one holding yourself to account. And that's not easy. For most people, the dashboard helps to create a little bit of separation between you the one who is doing what you're trying to do, and you are one part of you that trying to hold yourself accountable. But it's still it's still a real challenge. And most people may start off in a band, and then sort of Peter wrote, as it gets all the holding a stick to your own self. You know, that's the, this doesn't really work that long, it's a character a lot better, but I'm with your accountable relationship is the best of all,

Augusto Pinaud 52:20

riding on the coattails of the dashboard, this is really important. When data accountability goes both ways. You know, again, when you make this account to build the field, like another stick this fall apart really, really fast. And and that is a problem. The accountability works, no question about it, when it works both ways, when it worked from the top and when it worked from the bottom. And we're both being accountable about the data collected, and what actions were taking and how everybody's trying to improve. That is a challenge. When that accountability feels that it's only one way and usually is from the bottom to the top, okay, the bottom is accountable on the top is just looking at the data and marking down, then the problem is that gets broke, you can execute that way because people simply stop trying to push and instead of getting an effective result what you get it more pushback out of that. So that is part of the challenge. How can you make this accountability really go? Both ways? How can you make this accountability? How can you make those measurements so that you can show that you are being accountable as the leader of the of the thing, how so you don't make another stick, so people really help you to move that initiative forward.

Raymond Sidney-Smith 53:53

So as we come on the close of our time together, I think it's important for us to take heed to the fact that not every goal is a wildly important goal. But almost every goal can have a process associated with it. It can have a an understanding of focus, it can have an

understanding of clarity of what needs to be done. It can have a sense of engagement, and it can have accountability. For those very reasons. I think that you can manifest a system like 40 acts, that really helps you reach more goals more consistently. Agree or disagree.

Augusto Pinaud 54:40

I agree. I completely agree. And I again, I have seen them when you figure it out those goals, but he'd require to, at least for that important goal and for that measurement that the organization gets flat, that the organization at least Those purposes can really provide a flat environment where everybody is, has the same level of accountability in their little square, when that is accomplished, and when the leaders can come and we as accomplished as the last person on that chain of command, then that is possible people he seen now, this as part of the social fabric of the, of the enterprise, and now people is really open to, to participate, and to be part of this and to really bring the best forward. Now, they send this as a group trust, now, they, they are able to really bring as a whole, when that's not possible, sadly, that basically throw everything in pieces and apart.

Raymond Sidney-Smith 55:55

Yeah, and I think that in a work environment where you're working in a team, it's very difficult to do that without an understanding that mistakes need to be made in order for people to learn. And when you don't have a culture where mistakes are relished where mistakes are understood, and then corrected in a way that doesn't make people feel wrong and bad, then you're going to have trouble with this kind of scorecard leaderboard environment. On a personal productivity perspective, I think that this does require most likely some form of accountability, partnership, some kind of way that you can create accountability with others. Now, you know, there are folks who can keep themselves accountable that have that level of self accountability. But if you have any struggle with self accountability, then you're going to need some kind of one to one group or larger level of accountability, to be able to make this kind of thing really stick for you. Because then you're just tracking numbers for the sake of it, you need some level of being able to have someone else look at those numbers. And many times the brain trust associated with that can be helpful. So I just I think that accountability is really one of the core features here that can be very empowering for you. If there's not judgment, if there's just analysis and looking at ways to be able to improve upon the system, and the lead measures, and therefore really get at what Art was talking about, which is why why is this happening? And can we optimize the on the process? Can we optimize on the procedures that are leading toward What's going on? And if there are problems? Why is that happening? So we can uncover the true problem to then come up with a true solution. So I think that that's all good stuff there. All right. We have reached the end of our first book cast for the four Disciplines of Execution, achieving your wildly important goals, by Chris McChesney, Sean Covey, and Jim healing. While we are at the end of our discussion about the book, the conversation doesn't stop there. If you have a question or comment about what we've been discussing about this book, and during this cast, please visit our episode page on ProductivityCast dotnet. They're on the podcast website at the bottom of the page, feel free to leave a comment or question. We read and respond to all of them if you want a response. If you've enjoyed spending time listening and learning with us today, it'd be great if you can help us by adding a rating a review on Apple podcasts or Stitcher or whatever podcast app you have. If it lets you leave a rating review, your compliments motivate us to keep going and they help us grow our personal productivity listening community by signaling to the podcast algorithms that we're putting out quality episodes. So thank you, for those who have already left reviews. We really appreciate that and keep them coming. If you have a topic about personal productivity you'd like us to discuss on a future cast, please visit productivity cast dotnet forward slash contact, you can leave a voice recorded message where you can type us a message and maybe we'll feature it on a future episode. I want to express my thanks to Augusto Pinaud Francis Wade, and Art Gelwicks for joining me here on ProductivityCast. This week, and every week, you can learn more about them by visiting the productivity cast dotnet

page about us. I'm Ray Sidney-Smith and on behalf of all of us here at ProductivityCast here's to your productive life.