

## FINDING POINTS OF LEVERAGE

Levers allow you to apply force at critical points. You can probably think of a hundred ways to “lift” your organization, but how do you find the few places in the system that will make the greatest difference? Here are some common elements.

**Involve the people who will make or break improvement initiatives.** When a school board I work with invited school principals, as well as district staff, to the annual planning retreat, strategic goals could for the first time be aligned with ongoing school improvement projects. Not surprising, external and internal leaders began to move in the same direction, and principals invested in achieving goals across all grades.

**Agree upon a vision.** An incorporated medical practice experienced chronic dissension among board members and between the board and providers. First my partner and I met with key board members and providers to gather a variety of perspectives. Then we met with the whole board and staff separately, asking each to list what they expect of themselves and what they expect of the other group. These expectations and a jointly created list of the organization’s strengths and gaps revealed much common ground. When board and staff together envisioned the future, they readily agreed upon ways to capitalize on strengths and meet challenges, and this vision created new focus for moving forward together.

**Ensure that each division’s objectives cascade from a few organization-wide goals.** Two non-profits with whom I work planned from the bottom up. That is, each department had its own goals, objectives and annual work plan; consequently, some twenty or more goals were ongoing, and work within each business unit was “siloeed” or disconnected from other departments. By occupying leaders with disparate initiatives, these plans distract both business unit leaders and central leadership from steering strategically. Mark Blazey, Baldrige Performance Excellence guru, depicts systems like these as many arrows pointing in different directions. The solution? Strategic goals have to be set for the whole system, with each business unit asking, “what is our part of driving these whole system goals?” Planning cascades from long to short term and from whole system to business units to individual job roles.

**Create consistency across the whole system.** Whether I am coaching an executive, leading group decision-making, or assessing the whole system, my work often involves teaching or solidifying the use of consistent frameworks and skills in finding root cause, planning, decision-making, and leadership development. Consistency builds staff capacity and also, to return to Blazey’s metaphor, turns systems arrows in the same forward-facing direction.

**Document improvements.** Green Mountain Finger Lakes National Forest’s intranet houses purpose statements, roles and responsibilities, and work plan objectives for each team that coordinates work across the system. The visibility of these fundamentals facilitates coordination, keeps teams accountable, and promotes organizational learning by ensuring that knowledge is accessible and not dependent upon individual people’s memories or practice.

*Please copy this article with complete copyright notice.*

*Copyright © 2004 Merryn Rutledge*

## The Tipping Point

Sometimes outside influences that strain the organization also suggest the very points of leverage the organization needs in order to spur improvement. Such outside circumstances include:

- A large competitor moves into your region
- Your customer base shrinks because of client company mergers
- You must comply with stringent Federal requirements.

One client strengthened business partnerships in response to competition. Another client diversified services to respond to a shrinking customer base. In a New Hampshire project, we use Federally required Improvement Plans to help schools and districts learn “root cause analysis” and improve critical systems.

## Small Changes

In *The Tipping Point* Malcolm Gladwell describes how small changes often create “the stickiness factor”—that is, visibility, momentum and lasting change. Though his book centers on marketing, many principles apply to improving organizations.