

'Whether' check #1

A planned path to success, when done with a broad view, incorporates soft measures of workforce capacity as well as the historical record of financial health. Whether or not a business is on the planned path to success requires a frequent check. It's more complicated than just reviewing the financials.

Guidance items to check include any document that provides long-term direction. These directional statements provide a stable decision-making standard for everyone - from the boardroom to the loading dock. Like any manufacturing process, consistency and accuracy will enable better control of results. If different parts of the organization are using different criteria to make decisions, things get confusing - and confusion causes hesitation.

We usually refer to the directional documents as the **belief set** and they normally include five essential elements: purpose, missions, values, shared vision and a comprehensive understanding of the ideal customer profile. These five elements create a context for business decisions that tend to standardize decisions across the organization. Examining each of these elements provides insight into why they are so important.

The organization's **purpose** clarifies the single reason for existence. The importance of this brief statement sets the organization apart from its competition. There are plenty of organizations that come up with cute jingles or slogans like, "Our purpose is to be number one in customer satisfaction!" This sounds good, but does it separate the firm from its competition? Not likely.

Someone once suggested that organization purpose is what you would still be trying to do if there was just one person left to do any work at all. What would that one person still be trying to do? "Establish the standard by which all other post hole diggers are judged" is a more acceptable purpose because of its clarity and because it establishes a relationship with the competition. That one person continuing to pursue purpose will always know what has to be done.

Missions make it clear how we make and steward our property and revenue. Organizations must exchange revenue for products and services. The extent to which that happens effectively impacts the flow of value - in and out. A car dealer may have two external missions - sell cars and service cars. It had better also have one or more internal missions, like efficient processing. The exter-

nal missions attract revenue, while the internal mission optimizes profit.

Values allow decision-makers to distinguish the best courses of action from the many possibilities. Values in action focus decision-making. A published value of "integrity" means that our promises are kept. This may translate into cautious promises, but it ought to also translate into pulling all stops to assure that a promise made will be kept. If we promise that your order will be ready at noon, we ought to have the authority to be sure that the order is ready for delivery on time. Customers notice.

Shared vision ensures that a sense of discretionary ownership has as many key fingerprints on the future as possible. The leaders' vision is best attained if she encourages those who must help achieve the vision put their fingerprints on it. It is common for the vision statement to be short and crisp, "We're number one!" This may be an effective cheer at a sports context, but is likely not a compelling vision because it lacks systemic implications. The custodial staff may not be as inspired as the manufacturing department.

Finally, the **customer profile** describes the best customers we want to attract and keep. Not all customers are necessarily equally desirable. Organizations that know what characteristics cultivate the highest return-on-investment are more likely to achieve their vision.

As we launch another "Best Places to Work in Hampton Roads" competition, think about whether or not your organization is ready for the distinction. Don't worry as much about preparing the application as preparing the workforce. Watch for additional "whether checks" in the coming weeks as a means of helping determine the extent to which members of your workforce are ready for the "lone employee" challenge.



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