

The Quarterly Review & Refinery

A reminder from Kirby Martzall

Spring is on the way. The days are getting longer and it is hard to believe we are almost three months into 2003. Now is the time to take the time to prepare and then conduct your **Quarterly Review & Refine Session**.

While the world state is uncertain, markets are fragile and the economy is - well, the economy; it is easy to just keep plugging along or to say lets take a look at things in July and see what's happening. On the other hand you clearly understand your leadership role and know how important it is to everyone in your organization to experience you modeling consistency, continuity and clarity at times when the world and situations appear to be anything but consistent, filled with continuity and clear. People take their lead from you and what you do.

You know the power of communication and the greater power of effective, timely communications and interaction. Take this opportunity to pull your self, your leadership team and your entire team together to have a conversation about achievements, challenges and next steps for the coming quarter. There is no one better positioned to take this leadership action than you.

As I can be a resource to or sounding board for you- please do not hesitate to contact me.

AS QUARTER ONE DRAWS TO A CLOSE

- Don't assume just because everyone has been 'working hard' that everyone knows where you are going, how you are doing and what is coming in the near future.

- This is an excellent opportunity to Celebrate achievements, Recognize contributions, Identify challenges ahead and Agree to next steps and accountability moving forward in Quarter 2.
- This is a great time to refine and reset strategy as needed to remain aligned with external and internal changing conditions and factors.
- The R&R Session allows you to reinforce vision and strategy. To illustrate the integral link between the strategic 'big picture' and the operational, 'daily reality and actions'.
- Focus on implementation with measurement applying 'what gets measured gets done' to your culture and experience.
- Involve each person leading an area, function, process or initiative in updating progress YTD while giving and getting feedback with others that can lead to refinement, improvement and performance gains.
- Taking this step, this and every quarter is part of the process for developing critical capability in and across your organization, for positioning and building leadership skill sets and for living the values and priority that makes up and keeps up your culture.
- Have fun, make this a brief but memorable experience and part of the tradition that makes your organization a great place to be and to be part of. It's not about spending dollars, it is about investing interaction. It's about a common, meaningful experience.

Invest this time to design and implement strategy and action that survives its collision with reality.