Customized Logistics & Delivery Association
New Orleans, LA
May 11, 2018

CLDA MISSION STATEMENT

- To promote, advocate, educate & provide networking and business opportunities for the time-critical customized delivery community.

STRATEGIC ROAD MAP

STRATEGY

Strategy is the making of an integrated set of choices that collectively position your company in its industry so as to create sustainable advantage relative to competition and deliver superior financial returns.

PRIME

Flexibility  Control

ASSESSMENT

- What percent of time is spent on strategy, improvement work and daily work?
- What is the appropriate distribution of your time based on your position?
- What would you change? How would you spend your time?

STRATEGY MAP
**STRATEGY MAP INVERSION**

- **Cascade**
  - Driver
  - Strategic Objective
  - KPI
  - Team Goal
  - Individual Goal

- **Results**
  - Driver
  - Strategic Objective
  - KPI
  - Team Goal
  - Individual Goal

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**ALIGNMENT & ACCOUNTABILITY**

- **Company KPI**
- **Distribution Center Team Goals**
- **Vertical A Team Goals**
- **Vertical B Team Goals**

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**TEAM AND INDIVIDUAL GOALS**

- Must measure **RESULTS** not **ACTIVITIES** or **PROCESS**
- Statements of **WHAT** you will achieve (results) not **HOW** you will achieve it (activities)
- Not be a repetition of the Company KPI, but a statement of associate or team goals using SMART Methodology measurements
- Must have importance for achievement – 80% of the benefit comes from 20% of the tasks

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**WHAT IS EFFECTIVE GOAL SETTING?**

- Focuses associates efforts on company’s most important goals
- Good **metrics** involve buy-in at all levels in the organization
- It needs to be a **collaborative** process between associate & supervisor
- Creates an **understanding** of how job tasks affect company performance

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**SMART GOALS**

- **Specific**: State exactly what you want to accomplish (Who, What, Where, Why)
- **Measurable**: How will you demonstrate and evaluate the extent to which the goal has been met?
- **Achievable**: Stretch and challenging goals within ability to achieve outcome. What is the action-oriented verb?
- **Relevant**: How does the goal tie into your key responsibilities? How is it aligned to objectives?
- **Time-bound**: Set 1 or more target dates, the “by when” to guide your goals to successful and timely completion (include deadlines, dates and frequency)

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**TOOLS WITH MOST IMPACT**

- Brainstorming
- Affinity Diagram
- Cause and Effect Diagram
BRAINSTORMING EXERCISE
Identify key activities and their “work products” that impact strategic objectives and KPIs.

A. Brainstorming Issues or Ideas
1. Name one issue or idea – write down highly
2. Name second issue or idea – write down highly
3. Name third issue or idea – write down highly
4. Name fourth issue or idea – write down highly
5. Use a second or third issue or idea – write down lower
6. Use a fourth or fifth issue or idea – write down lower

B. Generating Thrust Stakes
1. Start with one and start again
2. Start with second and start again
3. Start with third and start again
4. Start with fourth and start again
5. Start with fifth and start again

C. Affinity Process
1. Argument for using the Post-it
2. Use Post-it
3. Print with sticky side down – legibly
4. Use black Sharpie pen
5. One idea per Post-it
6. Must be a complete sentence
7. No more than four lines per Post-it
8. Use multi-valued language
9. State Post-it as a fact vs. emotion, judgment, or inference
10. Do not talk while writing Post-its
11. State facts; not solutions

D. Presenting Your Ideas
1. Go around the table and each person brings two Post-its to flip chart
2. Read each Post-it aloud
3. No arguing whether the Post-it is right or wrong – can only seek clarity of intent of author
4. If Post-it needs to be changed – use a red Sharpie
5. If your Post-it has a different meaning to you than others already presented – stick it on wall
6. Repeat process until all Post-its are on flip chart

E. Affinity Analysis – Everyone Participates
1. Organize Post-its putting like ideas together
2. Do not talk – 10 second rule
3. Try to keep your groupings to absolute key ideas

F. Header Cards
1. Talk about the meaning of the Post-its in a group and write a header card following using a red Sharpie
2. On a separate flip chart – abbreviate the essence of the header cards and list them

Resolve Billing Issues
Answer IC’s
Answer IC Questions
Administer IC Non-Compliance
Recruit IC’s
Driver Audits
Manage Technology Issue
Publish Data For Customers
Manage Phone System
Develop Dashboard
Keep Network Up

AFFINITY ANALYSIS
Meet Customer Requirements
Manage Information Technology Systems
Reduce Technology Issues
Manage IC Requirements
Answer IC questions
Answer Customer Questions
Coach IC’s
Keep Network Up
Resolve Technology Issue

SUSTAINING STRATEGIC TRACTION
Weekly Tactical Meeting

1003: Executing Strategy in the Midst of the Whirlwind (Thomas, Surber)
**TOP 10 BEST IN CLASS**

- **Strategic Plan:** Develop, update and communicate a business strategic plan, with continuous measurements of results.
- **Job Descriptions & Coaching:** Up to date job descriptions, performance management/coaching, goals, feedback and evaluations.
- **Leadership Development & Learning:** Implement leadership development plans for key positions and successors.
- **Shareholder Agreements:** Outline policies concerning employment, ownership, compensation, conflict resolution, personal and corporate responsibility.
- **Consultants & Boards:** Establish Board or Board of Advisors.

**TOP 10 BEST IN CLASS**

- **Succession Plan:** Create contingency or estate plans for owners and key officers.
- **Retirement:** Communicate and create retirement plans for owners.
- **Finances:** Experience continuous financial success over time in terms of sales and profit growth.
- **Communication:** Create an active and functioning Family Council that serves the purpose of communicating company and family issues.
- **Mission, Vision, Values & Culture:** Embrace and encourage company and individual community service.

**LEADERSHIP**

- “If your action inspire others to dream more, learn more, do more and become more, you are a LEADER.”  
  
  *John Quincy Adams*

**THANK YOU!**