

BEYOND BITS AND BULLETS: TURNING STRATEGY INTO ACTION THROUGH STORIES

CRAIG WORTMANN
WISDOMTOOLS, INC.



Learning is like Velcro. An unfiltered fact is not a complete fastener. Only one side of learning is made up of facts; the other consists of stories — that is, ideas and images.

— Richard Saul Wurman,
author of *Information Anxiety 2*

All leaders feel the crush of time and the pressure for results. They are pulled in many different directions and asked to make important decisions, often without good information or preparation. One of the things leaders need most is to have their employees reliably execute the strategy of the company and reinforce the brand. The problem, however, is that the leaders at the top of the organization are the ones who create the strategy and the people who need to execute it *are not part of those conversations*. The challenge for leaders then, is getting employees connected to the strategy such that they know how to execute it, and *why it matters to them specifically*, and to the company. Without that, the business does not get results.

So how is this done? The strategy first has to be communicated to employees and then continually reinforced. There are only a handful of tools at the leader's disposal to get the message out and keep employees focused, including email and voicemail, mobile phones and pagers, conferences, training sessions, meetings and enterprise-wide software like portals, CRM and ERP systems.

Think for a moment about what your company spends on all of these tools and systems: the figure is certain to be solidly in the millions of dollars, even for the small to medium-size company. The unstated purpose of all of these tools is to help the company perform

better by communicating the strategy, the work to be performed and how and when that work should get done. And, of course, these tools can be successful in doing what they are meant to do. But most often, especially in larger organizations, they help to create an environment where information and facts comes in bits and bullets, devoid of any context that helps people learn and apply it to their immediate challenges.

In contrast, *story* is a tool that is highly leverage-able, since it “costs” nothing but has a powerful impact. Stories told by leaders can be used in conjunction with each of the communications methods listed above, making those tools much more valuable. In terms of helping people turn “strategy” into “action,” stories add the right context back into work challenges, helping employees “see” the right and wrong way to execute and helping them understand the consequences of bad decisions. Stories implicitly and explicitly communicate what success looks like, while leaving room for employees to “fit” the lessons to their specific situation.

Unfortunately, by the time the company’s strategy is translated into goals and objectives for the divisions, team and individuals, it has been thoroughly “laundered” and it becomes very difficult for the employee to trace it back to where it came from in order to make sense of it.

Often, leaders talk about the importance of gaining “buy-in” to the strategy. Imagine two different approaches to a simple example.

Facts are neutral until human beings add their own meaning to those facts. The meaning they add to facts depends on their current story. People stick with their story even when presented with facts that don't fit. They simply interpret or discount the facts to fit their story. This is why facts are not terribly useful in influencing others. People don't need new facts – they need a new story.

– Annette Simmons,
author of *The Story Factor*

Approach One: A leader says, “Janet, here are the three things I need you to do to become a high-performing salesperson. I need you to add value every time you see a client, communicate our message, and I need you to follow through. Got it?”

Approach Two: A leader says, “Janet, here are the three things I need you to do to become a high-performing salesperson. I need you to add value every time you see a client, communicate our message, and I need you to follow through. In fact, I remember a client I had several years ago who was always extremely busy. She never had time for

me and when she did, we would be constantly interrupted. So I always made sure that when I did get an appointment, I asked her to just walk around the building with me. As soon as we got out of the building, you could just see the stress melt away. She would relax and then we could start a real conversation. I always made sure that I had an interesting new concept to tell her about, another client story that shed light on one of her challenges or just an ear to listen to her issues. Then, after I left, I'd send her a thank you note with a couple of ideas..."

These two approaches are not very different. In the first, the leader used bits and bullets. In the second, the leader reinforced the bits and bullets with a story. Our heroine, Janet, will remember the story and almost certainly forget the bullets. But that's okay. All she needs to do is remember the story and make it her own. Imagine if the leader had stopped after the bullets. Janet would have thought to herself, "Okay, that's fine, but *how* do I do that?"

The biggest failure in turning strategy into action is stopping at the "what." But people need the "how" and the "why" or they easily stall. Or worse, they actively sabotage the effort.

So, what can leaders do to infuse more stories (and the right stories) into the limited array of communications methods? There are two highly practical and complementary tools that leaders can use to bring the right stories into the fold and to get people executing more reliably: the win book and the story matrix.

The Win Book

Fifteen years ago, I became aware of the concept of a "win" book while selling for IBM. The concept is a very simple one that combines much of what we know about how adults learn into a powerful tool for leaders.

When I first learned of the win book, it was simply a central file in which a person would keep all positive feedback they had received. The idea was that if someone wrote an email describing the great job you had done providing service to a large client, you printed the email and put it in your win book file. Or, if you got a strong performance review, you copied it and put it in the file. That way, whenever you needed some motivation or inspiration, the file was there. And it was not generic...it was about *you*. You could revisit the successes you had and be reminded of how you had gotten those results.

I was so taken by this concept that I spent the next fifteen years adding to and refining the idea of a win book, and it has been a powerful resource in my evolution as a leader. As a tool for leadership, the win book combines number of elements. It can include:

- A central archive of daily conversations and meetings, in chronological order
- Ideas and thoughts about strategy and best practices
- Stories that impact the business, either positively or negatively
- To-do lists
- Notes about employees, their successes and failures, and needs for development
- Articles, clips or pictures that need to be remembered or put to immediate use
- Illustrations and models that apply to your business
- A simple index of what is contained in the book

All of these elements are written down, or simply printed and pasted into the book. Once a book is filled up, a new one is started. The tool is a very flexible one, and everyone has different ideas about what their book will contain based on what's important for them.

But, in order to become a tool for leaders, the win book must become a central place where great ideas are stored, where things like employee recognition and stories that have impacted the business get captured. When the win book contains these elements, it truly becomes a resource. A win book that is used consistently and deliberately quickly

becomes indispensable. Remember when you first started using a “day-planner” and you put everything in it, from your meeting schedule and address book to your favorite quotes and baseball schedule? And if you lost it, even temporarily, you wanted to crawl into a hole? This same usefulness accompanies a well-constructed win book, because it contains everything you deem important about your business. If your day planner or PDA are the “liner notes” and “score” of your business life, then the win book is the “music.”

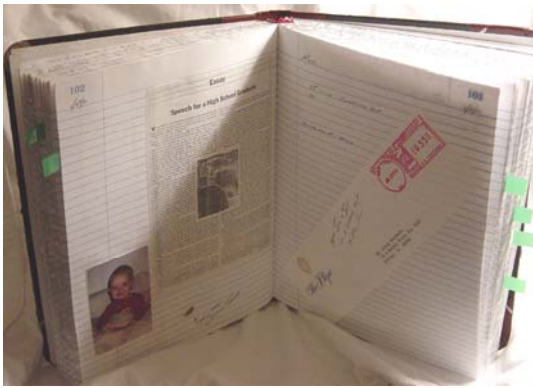
To be an impact player in business, you simply have to know more than most other people know. That means taking the power of ideas seriously, reading books voraciously, and developing a system of organizing what you've learned.

— Tim Sanders,
author of *Love is the Killer App*

The win book encompasses three critical elements of adult learning: reflection, context and, as Tim Sanders says, a place to organize things. Because you have captured thoughts, ideas, feedback and conversations as they have taken place, the book holds much more context than a simple file cabinet or folder. The win book shows you conversations you've had with employees and clients *over time*, and what got your attention in between. This adds context that is usually lost, because each artifact is parsed, filed and forgotten.

Sitting on a flight or waiting for a meeting becomes an opportunity to reflect on the prior month and pour over ideas that you haven't had time to consider. Or a leader may come across a bit of positive feedback that wouldn't hurt to give again. Artifacts that are meaningful to your life and business have continued relevance, long after they would have been distant memories in the back of a file cabinet. Some leaders read business books, thereby “reflecting” on what's important for their business. But a win book quickly becomes the book that is written *for* your business *about* your business. In this way, there is much less distance between the ideas and the ability to implement them.

As for having a place to organize your ideas, this is not as trivial as it sounds. Looking six months back into your win book and recalling client and employee conversations is a very powerful way to understand exactly how things have gone well, what tactics have worked and not worked and how client situations have progressed. I have surprised many clients with knowledge of their situations as they have changed over time. With simple file folders that live at the office, we rarely go back and access interesting



Example of a win book. The envelope, article and photograph all represent stories and learning, and their simple presence in the win book is all that's needed to call up that story.

conversations where value may have been hidden. Have you ever moved your office and wondered, “where did I get all of these files?” and “where’s the dumpster?”

The win book can take shape as a file, a journal (as I use it), a day-planner, or any form that is most useful to you. What’s most important is that the win book provides a central archive of successes, failures, thoughts on strategy as they occur, and concepts that need to be acted upon. *In a very real way, the book becomes a filter for what’s important and what’s not important.* In reviewing a series of conversations in my win book several years ago, I quickly realized that I had spent an inordinate amount of time with a large company partner that had not gotten any results for us. In a sense, my win book was showing me that I had wasted a lot of time, and by reviewing other conversations during that same period I realized where this time would have been better spent.

The Story Matrix

If the win book is the filter of your business life, then the story matrix is the gold that falls through the bottom of the screen. The purpose of the story matrix is to give leaders ready access to *their own* stories, such that they can more be deliberate about weaving those stories into their communications.

The story matrix is a simple spreadsheet (*see one example below*) that places a leader’s stories into different categories. The stories themselves come from the win book and are simply written or typed on to the story matrix (some people paste their story matrix into the back of their win book and record the best, most relevant stories as they come up).

The categories along the vertical axis represent stories about successes, failures, fun and legends (timeless business artifacts, such as stories about Henry Ford, Jack Welch or Herb Kelleher). The categories are meant to allow leaders to choose the most appropriate story, based on whether they are motivating a team or an individual, providing corrective feedback or just having some fun.

The categories on the horizontal axis may change depending on the type of leader. The example shows a story matrix for a senior executive of a large organization, so is more general for that purpose containing stories about leadership, teamwork, service, etc. But, the leader of a call center operation, for instance, may want to get much more specific and include stories about successes and failures with systems, metrics and relationships to the performance of the overall company.



Example of a story matrix. As stories are captured from the win book, they are placed in "cells" depending on the type of leader using the matrix.

The story matrix should always contain the category called “me.” The purpose of stories of *personal* success, failure and fun is to encourage leaders to let employees get to know who they are and the values they hold.

When the story matrix begins to be filled out, it becomes another tool that leaders can use to have a greater impact with their communications. The story told to the salesperson, Janet, might have been pulled from the Sales/Success portion of the matrix. Or a leader who is preparing for an important meeting may use the story matrix to choose the two or three best stories he can use to illustrate his key points, whether those key points reside on PowerPoint slides, in memos or are delivered in person.

Conclusion

The win book and the story matrix represent two powerful and practical tools leaders can use to improve performance and turn strategy into action. The first captures what is most important and what needs to be acted upon. The second uses stories to make those actions easier to understand and adopt. Leaders have the opportunity to go beyond the bits and bullets that make up so much of our business life and use these tools to get better results. ☞

A good story cannot be devised, it has to be distilled.

— Raymond Chandler

For more information about the power of stories in business, contact:

Craig Wortmann
craig.wortmann@wisdomtools.com