

OGSM Dos and Don'ts

Dos	Don'ts
<ul style="list-style-type: none"> • Introduce the OGSM: If you intend to deploy the OGSM approach to strategy, plan to take time to introduce the tool and it's pros and cons so people are familiar with the methodology. • Involve your team: if you have team members, involve them in the strategic planning process to receive their input and expertise. This also helps to create understanding and clarity in the team early on what strategic priorities are. • Get leadership involved: if you deploy OGSM in your business, make sure your senior leadership is aligned with your objective, goals, and strategies. Involve them early and check in along the way. • Conduct OGSM workshops: in our experience it is most effective to deploy the OGSM method in a strategic planning workshop. Consider going off site where you are uninterrupted and free to think strategically. • Take sufficient time for discussion: when creating the OGSM, allocate enough time to allow for open discussions and reflection. In our experience, strategies that arise from candid strategic discussions are far more effective. • Include an external perspective: when creating your strategic plan, seek an outside-in perspective. Learn what customers, suppliers, partners think about your business. • Set a clear timeframe: be clear about the time frame for your strategy. Are you planning 3, 5, or 10 years ahead? Are you creating an annual operating plan for one year? Make sure that your objective, goals, strategies and measures align with this timeframe. • Be specific: use language that applies solely to your business and your situation and leaves no ambiguity or room for interpretation. 	<ul style="list-style-type: none"> • Don't use OGSM for the sake of using OGSM: be meaningful about selecting the strategic planning approach that works best for your business. • Refrain from generalizations: Avoid platitudes that could apply to any business or any time. Make the OGSM specific to your business and your situation. • Don't create a laundry list of actions: avoid spreading your resources too thinly across too many initiatives. • Don't create the OGSM in isolation: top-down strategies often lack commitment and buy-in. OGSM works best when created and executed in the team and with clear strategic context. Anchor the OGSM in your business processes. • Don't skip a step: OGSM is most effective when O-G-S-M are all addressed in order from left to right. Don't just go through the motions but sufficiently address each step. • Don't keep the OGSM a mystery: be open about the OGSM methodology and what the OGSM for your business looks like. Transparency wins! • Don't delegate responsibility for the OGSM: the OGSM should be the strategic plan for the entire business and should be owned by the business leader. It may help to have a facilitator who reminds people of their commitments. But the overall responsibility must be with the business leader and the leadership team. • Avoid perfectionism: Don't get lost in details about the looks or the wording of your OGSM. Make sure that the statements are clear and unambiguous but then move on. It's more important to execute than to reiterate the wording. • Don't forget to execute! The OGSM or any strategic plan is only that: a plan. Use the approach to drive execution in your business. • Don't cascade too far: Avoid creating individual OGSMs for every organizational

- **Use the “what-by-how” format:** When writing your objective, strategies, and measures, use the “what-by-how” format to incorporate in one statement “what” you intend to do and “how” you intend to do it. This makes the statement much more clear and makes it easier to take action.
 - **Create SMART goals:** make sure your OGSM goals are specific, measurable, ambitious, realistic, and time-bound. Do include financial goals.
 - **Create goals for the “what” and “how”:** define SMART goals for the “what”-part of the objective and the “how”-part. This defines both the success of the destination and keeps track of your progress in the right direction.
 - **Limit yourself to 3-5 strategies:** Seek to deploy no more than 3-5 high impact strategies to reach your objective and goals.
 - **Limit yourself to 2-3 initiatives per strategy:** Similarly, limit yourself to only 2-3 high impact actions or initiatives per strategy to allow sufficient focus without putting all your eggs in one basket.
 - **Split measures into metrics and initiatives:** we have found it very helpful to distinguish each measure into SMART metrics and an action plan.
 - **Test your strategies and measures:** check for clarity, sufficiency, alignment and resource sufficiency.
 - **Assign owners:** assign an “owner” for each strategy. This person is accountable that the strategy is being implemented but may not necessarily be responsible for all actions.
 - **Keep the OGSM simple:** OGSM is a straight-forward approach to strategic planning. Keep it neat and tidy and restrict yourself to one clear objective statement, few meaningful goals, 3-5 strategies and 2-3 measures per strategy.
 - **Conduct a SWOT:** use the SWOT analysis to inform your strategic process and identify high impact strategies during OGSM creation.
- hierarchy or every individual employee. OGSM is most powerful when it captures the overall priorities of a business or a function.
- **Don’t debate methodology:** refrain from discussing the strategic process itself and rather focus on content and what the realities of your business are. Agree on the approach and then execute it.
 - **Don’t forget to celebrate successes!** Celebrate every initiative, every action, and every progress towards achieving your overall objective and goals.
 - **Don’t compromise:** when making strategic choices, avoid compromising if you are in disagreement. Make hard choices. Strategies need to be sharp and clear. No one wins when resources are spread too thinly to be effective.
 - **Don’t create individual plans:** avoid creating disconnected strategies in your business. Connect and align the strategies towards your overall objective and goals.
 - **Don’t be afraid to hire external help:** OGSM is simple but having an experienced facilitator or consultant can help move the business along the learning curve faster.
 - **Don’t rush strategic planning:** ensure you have sufficient time to prepare for a strategic review. Collect data, seek input from key stakeholders, and create a setting that allows strategic thinking.
 - **Don’t confuse strategy with operations:** avoid mixing day-to-day operations with the strategic initiatives that drive change and move your business towards its overall objective. Avoid including in the OGSM the activities that belong in a job description.
 - **Don’t forget the action plan:** each initiative under measures must have a caretaker, timeline and clear milestones. Ensure accountability and deliverables are clear.
 - **Don’t include ‘nice-to-have’ initiatives:** focus your OGSM on the ‘must-have’ strategies and initiatives to achieve our objective. Avoid including ‘nice-to-haves’ and running the risk of losing focus.
 - **Don’t forget to monitor implementation:** don’t skip the review meetings or let people off the hook. Have a regular cadence for follow up

- **Ask tough questions:** be candid and realistic about your business, its situation, its strengths and weaknesses. Have the courage to be critical.
- **Resource your OGSM:** make sure you have the resources available or can build them in time to successfully execute your OGSM. Resources means funds, knowledge, and skills.
- **Agree on a governance process:** Confirm at time of OGSM creation how you will follow up on execution. Set a cadence of e.g. quarterly reviews for 3-5 year strategies and e.g. monthly reviews for annual operating plans.
- **Schedule all reviews in advance:** fill the calendar with all review meetings ahead of time for the duration of the year. Make the meetings mandatory for the business team responsible for execution.
- **Check in regularly:** during OGSM implementation, check in regularly with your team on progress of each initiative - during formal reviews and “offline” in between. Make sure they have the information and resources they need to succeed.
- **Use OGSM for communication:** the OGSM format lends itself well for communicating your strategy. The OGSM shows where you are heading and how you are going to get there. All priorities on a single page!
- **Make the OGSM transparent:** allow everyone in your business to see the OGSM to understand what the priorities are and how everyone can contribute to achieving the business’ objective and goals.
- **Practice!** Practice makes progress. We have learned the OGSM approach over many reiterations. We realized how the plans and their execution got better and better over time.
- **Follow through:** the success of your OGSM and your strategic plan depends entirely on how it is executed and followed up on.

and ensure people live up to their commitments.

- **Don’t give up on your plan too easily.** Things might change in the external environment or inside the business. Don’t fold your OGSM too quickly but regularly review its implementation. Pivot where needed, but stick to your guns.