SNEAK PREVIEW

"Collaboration is a powerful competitive weapon; this book shows you how to use it to win markets." **—Mark Interrante, VP Content Products, Yahoo!**

create process execution understanding leadership people strategy art decision intelligence win criteria

the New How

Creating Business Solutions through Collaborative Strategy

business clarity change culture speed alignment framework commitment beliefs choice

O'REILLY

Nilofer Merchant

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Dear Reader,

As a publisher I'm almost ashamed to admit that I was a voracious business and strategy book reader but I abandoned the category a year ago. Why? I felt most of the products I came across were either restating the obvious or 10 pages of content puffed up to a 300-page book.

You can probably imagine the mixed emotions I had when I sat down to read the manuscript for Nilofer Merchant's *The New How*. I'm glad I did though. Reading this book gave me a renewed hope that authors who are passionate and thoroughly know their topic still have plenty of valuable wisdom to share.

I found myself immediately relating to the notion of an "air sandwich" and how strategy is often pushed from the top, with no consideration given to organization-wide buy-in. No wonder so many strategies fail.

I also love how Nilofer provides excellent, prescriptive advice on sitting at the collaboration table including the fact that ideas don't have to be fully baked at the earliest stages. And as Nilofer puts it, "organizations collaborate best when rewards are based on organizational success and less on individual accomplishments." Amen!

Here's another one of my favorite quotes from the book: Regarding whether to speak up or not, or to ask a "dumb" question, "It's better to look dumb and learn than to keep quiet and stay uninformed."

This sample chapter on MurderBoarding will show you how to be selective and efficient when brainstorming ideas collaboratively. It's based on Nilofer's experience over the years as a consultant for companies such as Adobe, Symantec, Hewlett-Packard, and many others.

I hope you like the chapter and find it useful. If you would like to review the entire book, let Sara Peyton know at press@oreilly.com. And be sure to mention *The New How* to anyone else who might be interested.

Thanks for your interest,

Joe Wikert
General Manager & Publisher,
O'Reilly Media, Inc.

CHAPTER 6

Phase III: Select

Freedom is not merely the opportunity to do as one pleases; neither is it merely the opportunity to choose between set alternatives. Freedom is, first of all, the chance to formulate the available choices, to argue over them—and then the opportunity to choose.

—C. Wright Mills

Killing Off Bad Ideas So Good Ideas Can Thrive

At a three-year product strategy meeting at Apple during the early 1990s, the McKinsey hired guns presented something I now refer to as the "99-idea slide" as the final summary of a strategy presentation. It was chock-full of information, presented in a visually compelling way. It showed all the viable product strategies we could pursue. With its combined richness and graphical simplicity, the 99-idea slide wowed all of us.

Shortly after the presentation, the meeting broke up. Apparently, we were "done" with our strategy process, and we had an impressive PowerPoint deck to show for it. I was befuddled. I wondered what I was missing. Maybe other people had a larger view or perspective—some special awareness—that helped everything make sense. It didn't seem like we'd actually made any decisions, but perhaps we had and I had missed it. The 99-idea slide was impressive, but I wasn't sure what it meant for the work I was leading.

Was someone going to tell me what the implications were? Or was it assumed that I already knew?

As it turned out, it wasn't just me; we were all unclear. Not one of the participants knew how to put the strategy into practice. So, like many consulting reports before them, the binders moved from the desk to the bookshelf and, finally, out of view. A few years later, Apple lost that particular market to the competition—exactly the outcome we had sought to avoid. It wasn't for lack of trying, or interest, or even willpower.

In this instance, the strategy was considered crucial, so we had taken a very different tack than we had with prior product strategies. In the past, a few execs had gotten together and quickly come up with some options, and the rest of us were told what to do. With help from the consultants, we had done a great job of whiteboarding and research to generate a vetted list of many viable options. These myriad options had opened up a Pandora's box, however. Having such a huge list to choose from was, in some ways, worse than having a shorter, less-considered list of options.[1]

So what was missing from our strategy? Perhaps it is obvious, but it took me some time to figure out that we lacked an underlying process that would have allowed us to winnow the many options down to the right option (Figure 6-1).

What was missing was a way to decide which of the available strategic options made the most sense for *us* to do. We had no organized way to select a strategy from the list. And, at least as important, we needed a way to determine which of the available options we should *not* pursue. In other words, we needed a way to kill off options so we could focus on moving forward.

Selecting "The One"

Perhaps you are thinking that any one of the options on the table in a given situation would have been good enough, and in fact

[1] According to a McKinsey Global Survey (McKinsey Quarterly, April 2008), most companies assess three or fewer options and look forward no more than two years when responding to a competitor's move. A significant number rely on intuition, and the most frequent response is the choice that is most obvious at the moment the decision is made, for example, answering a price cut with a price cut. Perhaps most alarming, if faced with the same situation again, 60% of executives would respond with the same or even less analysis.

***Figure 6-1**. The search for strategy*

that might be true. Sometimes good enough is indeed enough. But more often, choosing the best option matters. In this case, the "best" option is what makes the most sense for this organization, at this particular time, given the market conditions, matched to internal capabilities, considering allocated resources, and so on. By selecting the best option, you have a higher likelihood of achieving the vision behind the strategy.

Imagine your goal is to cross a vast expanse of territory to acquire something of value and return safely. The kind of vehicle you select to achieve this goal will depend on what particular territory you're crossing—its topography, climate, and obstacles—as well as the cargo you need to transport, the amount of risk that's acceptable, and the resources you have available.

If you have mountains to traverse, for example, you might choose a helicopter. If you are facing frozen tundra, you might choose a snowmobile. Each vehicle has particular characteristics and strengths that make it the right vehicle for a particular terrain: its rate of speed, its ability to move past obstacles, the number of people it can carry from here to there.

Strategy development works in much the same way. By the time you arrive at the 99-point slide, what you find in front of you is the equivalent to a fine array of nice-looking transportation vehicles that you've worked very hard to assemble. Each of them will

appear to get you from here to there. But which do you choose? Helicopter? Biplane? Humvee? Hovercraft? How will you decide? Might you need to involve a person who knows the details about the terrain, the cargo, and your resources? In practical terms, obviously, it's essential to make a decision. It wouldn't work to have half the team prepare the hovercraft and the other half jump in the helicopter. Unintentionally pursuing multiple options in parallel will waste resources and put your best people in competition for no good reason. Failing to choose means failing to achieve the goal.

With respect to strategy selection, deciding on one strategy option will typically improve your chances of getting where you want to go.

> For any given situation, one option is superior to all others. The question is, which one?

And is there really just one answer? I think there is. But let me be clear that by *one* strategy I mean an inclusive and complete strategy. So "one" is not about a singular idea. One strategy can contain many different ideas, but they must come together in a unified way. At an operating level, this might look like one channel strategy, or one retail strategy, or one enterprise strategy, or a combination of ideas, as long as they work as a unified whole. Using our prior example of transportation vehicles, we would use the word "helicopter" to describe the capabilities and discrete items that come together to form an entire strategy. The word itself is simply a container that combines many things within it. It's the kind of "one" that poet Walt Whitman evokes in "I contain multitudes." And when I use "one," I am using the word as a kind of logical handle that lets us simplify the way we talk about the array of complex options we ultimately need to prioritize.

Most organizations can align with only a certain number of efforts at a time. Thus, figuring out which vehicles—or which strategies or options—*not* to take is also key. When the issue of "what not to do" is left unanswered, strategies get interpreted many different ways and can fail as a result.

Under the time pressure of everyday business and in the absence of a good selection process, teams tend not to build a rich list of options, since doing so often seems to make the decision process harder. That is, organizations and teams that have a selection process actually do a better job of *generating* options to win.

So what you need is a mental or process framework that allows your group to kill off ideas and get to the right strategy for that time and that situation. You need an agreed-upon way to work with the necessary mix of people to align with what's important so you can shorten the list, dig into the details of the remaining options to figure out what's doable, and finally, fix what's not quite right to get to a limited set of truly interesting options. If the limited set has only one option, you're done. Otherwise, you and your team need to weigh the items against each other and *make a decision* so that you have a single agreed-upon strategy. Not only that, but you have to do it fast, or the next time people will revert to the command-and-control option of deciding and telling others.

The framework that can help organizations make complex yet subjective strategic decisions is one I affectionately call MurderBoarding. You might think it sounds a bit sinister, but successful businesses use this framework strategy for good purposes.

MurderBoarding: What Is It?

MurderBoarding is a kind of counter-weight to whiteboarding as a brainstorming tool. Instead of creating an unbounded set of new ideas, its purpose is to enable teams to evaluate many options effectively, yet still converge on the winning choice in a bounded timeframe. It's a framework to help you make the best decisions that affect large groups or social systems, for the good of an organization. It's also a crucial step in the collaborative strategy process, because it allows a decision to be made around *qualitative* messy choices. Thus it overcomes some key obstacles to effective team collaboration, namely the Kumbaya consensus orientation that often besets teams.

MurderBoarding highlights the focused, methodical, and premeditated mindset required for killing off even worthy ideas. It's not just the weak ideas that get killed; good options or ideas at the wrong time also need to go. Decent, but not great, ideas put forth by very nice people are also a target. MurderBoarding is not about

team spirit in any way. It is about a selection and decision framework that lets you and your organization make tough choices amongst good options.

As a reminder, all of this fits into the QuEST process as Step 3: Selection (Figure 6-2).

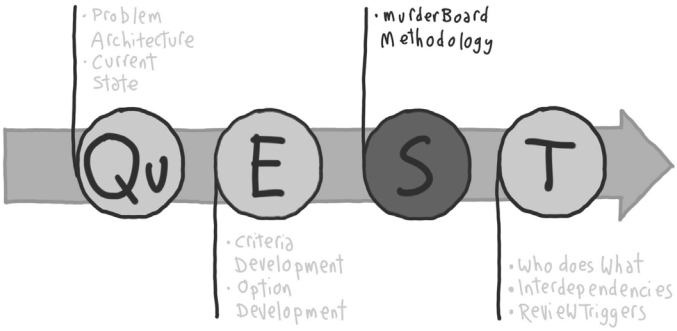

Figure 6-2. *Selection via MurderBoarding is step 3 of QuEST*

Note to Prod/Illus: in Figure 6-2, "MurderBoard Methodology" s/b "MurderBoard Framework".

This will need to go back to Hugh for text edit. —Prod

We need a framework to allow organizations to move past the data gathering and options development phase (embodied by either the 99-point slide or the Envision phase of the QuEST process) to achieve convergence. The framework must take into account the many reasons why people have a tough time making choices. We need to work fast, navigate the complexities of an organization, and ideally enable the organization to make interdependent or downstream decisions in alignment with the core strategy. The MurderBoarding framework addresses these needs by:

- Doing adequate discovery of what makes sense
- Transforming often-tacit beliefs into explicit decision criteria
- Debating and understanding what matters and why

Sometimes it helps to know how this fits into other management tools. MurderBoarding is not like scenario planning or decision-

tree analysis; it's not meticulous quantitative analysis or a predictive modeling tool. Instead, the goal of MurderBoarding is to enable critical conversations between people so that they can explore essential success criteria, evaluate trade-offs, test ideas, understand one another, and work together to pick the best strategy.

MurderBoarding is about optimizing your selection, *not* "maximizing" or "satisficing," which only aims to meet a minimum set of requirements. Using our example of transportation options, that would be the equivalent of choosing the first or easiest option (biplane?) that seemed to work, and being done with it. By contrast, with maximizing, a person wants to make the *absolute ideal* decision. Even if they review several choices and find a great option that seems to meet their requirements, they can't make a decision until after they've *fully* examined *every* option. This sometimes means never making a decision, and always means driving the average forward-thinking business executive crazy. Optimizing a decision is about making the decision based on a preselected set of criteria that you and your team can debate.

MurderBoarding is important because it ensures that collaboration actually makes sense for strategy creation:

- People can define, debate, agree upon, and ultimately communicate the criteria for success for any given strategy. This lets everyone be thinking partners, rather than having one (executive) group that "thinks" and another (lower-level management) that "does." This, of course, lets organizations close the systemic Air Sandwich mentioned earlier.
- People and teams have confidence that they will be able to move quickly from a rich list of viable options to a single strategy, so they are willing to build this list rather than go on gut instinct.
- Strategies are chosen based on their merits, risks, and feasibility.
- Strategies have more legitimacy because teams can see and understand the robust, transparent process. Substrategies can then be created in support of the core strategy.
- Resources are not squandered, since teams understand the activities they *shouldn't* do.

It is worth elaborating on the last point about resources. Our current economic climate has forced many companies to stop doing various things, but they have often lacked a way to intelligently discern what should get cut. MurderBoarding provides a way to do resource alignment intelligently rather than randomly.

When to Use MurderBoarding

MurderBoarding is a valuable tool when you have one of the following:

- Too many ideas at once. You know you're at this point when you find yourself asking, "Which one makes sense?"
- A situation that has changed in a variety of ways since the last business review.
- The organization seems to have lost its focus.
- A high-stakes opportunity (millions of dollars) that justifies the investment of a thorough review.
- A new vision that requires people to stop doing what they've been doing and shift to something new.

When asking, "Which one makes sense?", you need MurderBoarding.

Here are some sample questions that may signal a need for MurderBoarding: If your division could focus on only one thing in the coming year, what would it be? Should you take your product to another country to further develop and invest in it? Do you want to focus on your existing franchise and expand the customer base to mid-markets? Should you make more product improvements to keep up with the low-end competitors entering the space? Which idea makes sense? Has the organization lost its focus?

MurderBoarding will help you understand how each option serves the larger goals of the organization and decide the course of action that will serve your situation best. Being clear about a course of action means knowing both where you will focus your resources and where you will *not* spend time and energy. When you don't rule anything out, your organization or team won't know where

to focus their attention, and can't act in support of the goals of the organization.

People tend to resist change fiercely when they don't see what's in it for them, and MurderBoarding provides a structured way to align people to a new strategy. The story in the sidebar "To Turn Around a Big Ship" on page 142 illustrates a situation in which a new leader used a framework to reach a common understanding of what success looks like.

This situation had a key element that signaled a need to do MurderBoarding. When you have too many ideas to act on and you need to focus, MurderBoarding is like a razor-sharp tool for helping you slice away at fuzzy thinking. When gut feelings no longer provide enough clarity about which direction to take, MurderBoarding helps you make tough choices and can give you the confidence to move forward in a definitive way. When people see things differently and can't agree, MurderBoarding provides a mental elevator that your team can board together to rise above the individual perspectives, so that everyone can align to a common, higher-order vision of success.

There are many situations where teams should engage in the MurderBoarding process framework. But some situations do *not* call for MurderBoarding:

- When a straightforward change is being considered that clearly has no cross-functional impact.
- When the criteria for success are known, shared, and have not changed.
- When the stakes are low and consequences are minor.
- When the decision makers have the full faith of the team, and alignment issues will clearly not be an issue during execution.

Steps to MurderBoarding

There are four basic steps in the MurderBoarding framework (Figure 6-3):

1. Deciding what matters
2. Sorting
3. Testing
4. Choosing

To Turn Around a Big Ship

Rita was a newly hired VP in a Silicon Valley Fortune 500 enterprise software company. The C-Suite brought her in as a "change agent" to lead an existing 700-person team with a new charter to establish the company's platform in the face of such titans as Adobe, Google, and Microsoft. Her mission was to retake command of a market that the company had actually initiated, but long ago lost.

The good news was that the company's competitors were all building their platforms from scratch, and Rita's company already had a platform in place. The bad news was that the company had a legacy platform, and people would need to change what they were working on. Rita was having a hard time implementing this shift, with her people saying they were too overwhelmed with their current work to even have a meeting to explain all the things that were on their plates. They implied that the organization had a responsibility to hire more people, not just ask them to do more.

Rita took me to breakfast in Sunnyvale, and shared the story with irritation. "How do I get them to stop what they're doing so we can focus on this new mission and become a real player in the marketplace again?" Rita believed her next action was to get the team to stop doing what they were doing.

But the team thought they were "doing what mattered." They couldn't imagine stopping "just because." That would mean deciding to do nothing instead of something important. Before she could get the team to make a decision to stop something, she needed to get them to revisit and agree upon what really mattered to them.

I counseled Rita that this was in fact her next move. And she was able to use the MurderBoarding framework to get her team clear on the imperative to change, to agree upon what success actually looked like (beating those titans and reinventing their platform!), and then to choose what they would start and stop doing to refocus. Because the MurderBoarding framework engages the team in identifying what's important, they were able to get aligned without the normal political infighting. Without that alignment around the imperative, they couldn't imagine that there might have been something better to do than what they were already doing.

Rita needed to ask questions about the new strategy and what matters:

- Why are we doing what we're doing now?

- How is this serving us?
- How well do we understand the new objective? Do we agree the new objective is important? What is the gap between today and that new direction?
- What would success look like in the new future?
- Why do we want the new outcome?
- And specifically: What do we need to start and stop doing to go there?

Rita felt that if she didn't get traction quickly, the opportunity would be lost. She needed a lightweight framework for gaining alignment in a short timeframe. I showed her why and how to do MurderBoarding, and within 35 days, she was able to reallocate resources aligned against a clear strategy, with great buy-in from her people. It was the MurderBoarding framework that allowed her to make what was clearly a tough set of subjective decisions.

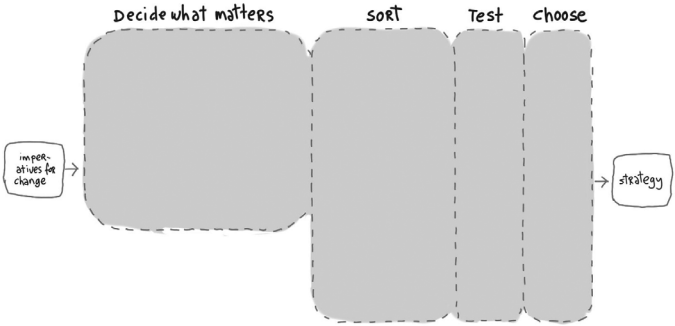

***Figure 6-3**. MurderBoarding framework*

Deciding what matters

This step is about gaining agreement and making explicit the things that all your stakeholders care about. It is figuring out, as a team, what is important to the business and determining the must-have criteria that should shape the strategy selection decision. Deciding what matters means explicitly setting aside the nice-to-have items. Once an organization is aligned on what it wants to do (or be), it can make the tough choices.

Sorting

This is about organizing ideas. It involves making a first-pass comparison of options against the criteria of what matters. Sorting helps to triage possible solutions, and to find out whether additional criteria will be needed to further evaluate the options.

Testing

This is about applying strategies hypothetically in context to see what insights develop. It is about going out in the organization to learn more, gather additional facts, and refine criteria further. Within the testing process, you fix, toss, tune, and merge ideas, molding them into fully vetted, executable strategy options.

Choosing

The last step is about making the decision—sometimes easy, often messy—together. It is about selecting the most appropriate idea given the situation you face today. Choosing is the last and most vital phase of MurderBoarding because the result defines your strategy. If you don't choose and you don't converge, then you don't have a strategy. And you can't win.

If you don't choose, you don't have a strategy; you just have a set of options.

Step 1: Deciding What Matters

When a team can say clearly what matters in the decision, they will be able to see their strategy options with sharper focus and make important distinctions between the options. Deciding what matters is about getting to the heart and soul of an issue, enabling you to see the difference between an adequate strategy idea and an extraordinary one for a specific situation.

Your own experience may have already taught you that successful strategies are those where the whole organization knows the answers to questions such as: Where do we want to be? How will we know when we're winning? What does success look like? The answers to these questions become a cohesive understanding that

drives the team's choices. Chapter 5, *Phase 2: Envision*, already covered the need to track what matters in the context of developing strategy ideas, but deciding what matters (and criteria tracking) is actually applied here as part of the MurderBoarding framework (Figure 6-4).

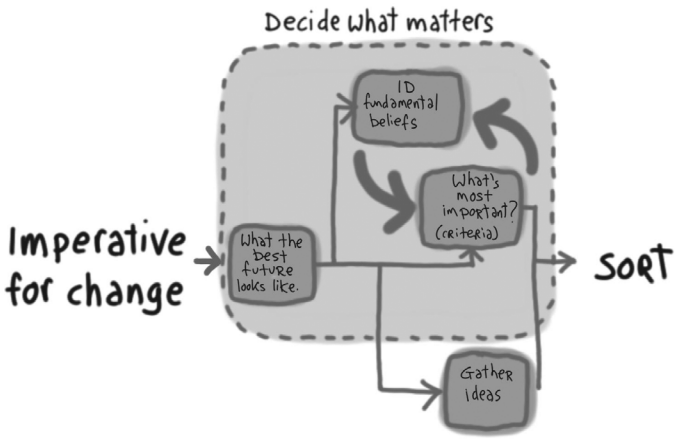

***Figure 6-4**. Step 1 of the MurderBoarding framework: Decide what matters*

Typically there are only two or three things that really matter when distinguishing between strategy options. Getting to "what really matters" requires some detective work to determine what is important in your specific circumstance, with your team, and in your market or company at this particular moment.

Before considering the options, start by figuring out what should shape the decision. Ultimately, this increases the relevance of the final idea or choice. These criteria remind you, as the leader, that you're not seeking some theoretical "best strategy," but rather the most appropriate strategy for your specific situation. It isn't about good or bad, right or wrong—it's about which one fits your goals most closely.

Every organization has a number of belief systems that influence which criteria will be chosen. Some beliefs are explicit and therefore largely shared, but many are unspoken (tacit) and are typically held inconsistently throughout the organization. The tacit beliefs usually tie in to people's underlying sense of identity and of

what the firm/product/business "is." Tacit beliefs can be problematic when they anchor people—and therefore the organization—to the past, thinking about what they've done or have been rather than what they could do or be. The analogy of an anchor is appropriate because it's the anchor that keeps a ship stuck, unable to maneuver away from an oncoming storm or seek out new harbors. Some organizations are so anchored that new strategies are hard to find.

Beliefs profoundly influence the organization's vision of what success looks like. Whereas explicit beliefs are often fairly consistent across the team, tacit beliefs differ across the organization and can lead to "hidden agendas," which are, effectively, different tacit criteria. You'll often see tacit beliefs in teams that have been siloed and stable for a long time. The team's criteria for success will be driven by belief systems both tacit and explicit. A common agenda is essential to implementing a successful strategy, so it is important to ensure that you surface all the tacit beliefs and the resulting hidden agendas so that the teams can align.

When beliefs are tacit, they can influence a group's unconscious decision process.

Tacit beliefs left unidentified can subtly lead the group to choose a strategy that is aligned with the unspoken beliefs but is less optimal for the situation at hand. It is critical, then, to identify existing beliefs, and to surface tacit beliefs and make them explicit. Surfacing tacit beliefs allows them to be reconsidered, checked to see whether they are commonly shared, and evaluated to determine whether they are still applicable or need to be changed. Writing beliefs down and speaking them out loud allows a group to understand the intent behind historical decisions and to evaluate whether those beliefs still hold true or need to be adapted to move forward. Of course, this requires a discussion to take place with the involved parties. Exploring these beliefs will lead to an understanding of what matters to this organization, and why.

Saying things out loud allows you to bring clarity of thought to what you are saying, and gives others the opportunity to challenge the ideas. This explicit dialogue can prevent a whole team

from making decisions based on false assumptions, or coming to the mistaken conclusion that people are aligned in purpose when they are not.

So how can you find those tacit beliefs? What telltale signs give hints about those submerged ideas? And how do you identify the explicit beliefs so that you can make a thorough inventory of them, to help distinguish them from the hidden ones? It turns out that many clues are present in the language people use.

When executives are sharing ideas with their larger organization, they quite often embed their belief systems within their comments. These belief systems are subject to interpretation, and these interpretations can vary, leading to misalignment and causing well-intentioned people to execute poorly.

Expressed organizational beliefs typically use the language of needs:

- "The solution needs to be funded by organic growth."
- "The fix needs to fit with our current channel model."
- "We cannot create new product offers until the second year of the existing product line."
- "Product Team A's requirements need to be paramount because they provide the cash to support the other businesses."

Tacit beliefs are typically notions of identity or unwritten rules for how the organization does things:

- "We make products—things you can touch, feel, and see."
- "We compete on price."
- "We must do things through the retail channel."

These expressed organizational beliefs or tacit beliefs can represent criteria. Being alert to the hints in the language that people use is useful to a degree, but it's passive and therefore somewhat limited. You will also want to engage in active digging. Here are some helpful hints for unearthing important beliefs:

- List out beliefs as a group, and then deputize members of your team to search for any additional beliefs held in the wider organization.
- Ask people open-ended questions. For example:
  - What gets rewarded around here? By whom?

  - What is "sacred," "off-limits," or "untouchable"?
  - Similarly, who is "sacred," "off-limits," or "untouchable"?
  - What is worth staking your reputation on?
- Ask people to talk about their own experiences. It is also interesting to have people express what they believe others think of their views, whether they are shared views, heretical, etc. Often this can illuminate hidden issues that less introspective people tend to miss.
- Ask questions one-on-one or in small groups. Find a neutral, private venue where people can feel comfortable talking. Take a shared walk around the block, or grab lunch at a place not-so-close to the office so you won't be constantly checking over your shoulder for colleagues wandering by.

Bringing these criteria to the forefront at the start of the process enables you to fully consider what would be best for the business before the team gets wrapped up in one or two compelling ideas. By contrast, when criteria are *not* made known and explicit early, people tend to invest in ideas first and then let the ideas drive their criteria selection later in the process ("We must pursue this idea!").

There are two tempting simplifications that commonly arise in dealing with success factors. First, people tend to lump all success factors together and see them as equally important. This is attractive because you don't have to wrestle with ranking the factors. But this approach does not help the selection process, so it's actually a losing model.

The second simplification is establishing a hard-and-fast ranking. For example, suppose revenue is listed above affinity. A simplistic approach would resolve all conflicts between the two in favor of revenue, when in fact there may be cases where revenue is covered and you can afford to address affinity.

When you're done with Step 1 of the MurderBoarding framework, you'll have a clearly identified list of beliefs and criteria. It's often tempting to jump the gun at this point and "make the decision." Don't do it! Making a decision at this stage will usually take you to a second-rate option. Instead, it's important to take a reasonable amount of time to understand and improve your options. Step 2, Sorting, is key to understanding.

Step 2: Sorting

Step 2 of the MurderBoarding framework pushes teams to use the chosen specific, practical criteria to understand the merits of one idea compared to other ideas. This avoids the problem of "shoot-from-the-hip" final strategy decisions based simply on someone's "gut instinct." Once it's clear what success will look like and the team knows what matters to the final strategy selection, they need to test the options against the criteria, represent the results in a coherent way, and sort the options into buckets ("strong," "possible," "weak") based on how they measure up against each other. In this way, the team can identify which subset of ideas they need to stop pursuing (kill) and which ones they need to explore further (Figure 6-5).

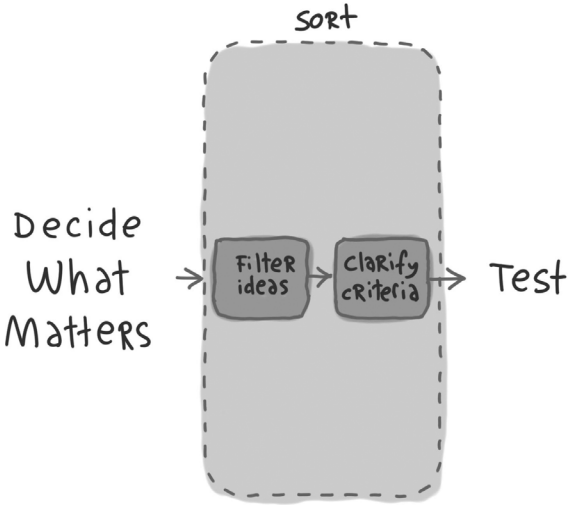

***Figure 6-5**. Step 2 of the MurderBoarding framework: Sort*

Newcomers to the sorting step sometimes have trouble getting a sense of "how much is enough, how much is too much." To clarify, a deeper example is worth pursuing here. In this case, a team looking at geographic market expansion came up with criteria for what success would look like when establishing a presence in another country. The team developed this list based on what they knew about their previous successes in other vertical markets. For them, going global meant having:

- Different types of buying options (enterprise licensing, shrink-wrap, etc.)
- The right channel in place
- Dedicated headcount
- Budget requirements that fit within the parameter of revenue/expense ratio
- A product that worked right in the local language
- An online store where people from that country could buy the product

In the sorting step, the team needed to test options against the criteria. In our example, these options were the different countries under consideration. The team evaluated each country by the criteria just listed and built a thorough description of the current landscape, shown in Figure 6-6.

Sorting will result in everyone knowing why one thing is more important than another.

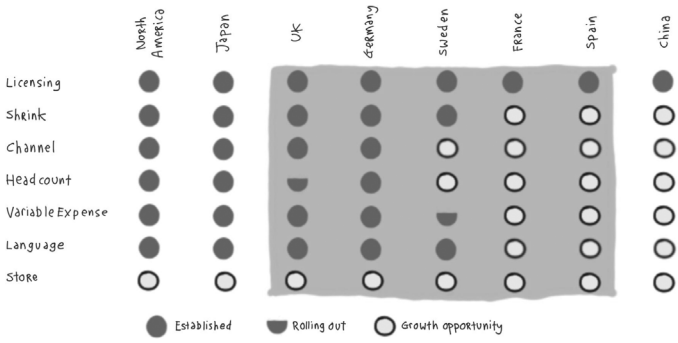

Figure 6-6. *Doing the first sort*

This picture drove the next level of questions and decisions. The team believed that some countries that appeared similar could be distinguished with the addition of one or two well-chosen criteria. After some discussion and data gathering, they added these two criteria:

- Country sales leadership's readiness to commit to increased quota in exchange for investment
- Acceptable expected level of in-country piracy

After the facts were gathered, it was clear which countries would be able to drive growth. Regions such as North America and Japan already had nearly all of the criteria in place. Some countries had little investment in place to support vertical expansion, and conversations with the heads of those regions were marked by enthusiasm and interest. They were willing to commit to growth targets in exchange for incremental dollars. The qualitative discussions with the heads of the regions gave the team a clear understanding of the current state and enabled some early decisions.

Unsurprisingly, surfacing the criteria early in this process helped make sure people were, in fact, making decisions based on identified criteria. The sorting process involved many people bringing different points of view and understanding what mattered to the business. Filtering through these points of view brought up more discussion items, which ultimately led to revisiting and revising the criteria that drove their decision:

- Use the proven model they had already created for North America. Don't customize for each country.
- Drive revenue in relationship to the investment made. Some countries could be more expensive, and there had to be some "fairness" in the way investment dollars were allocated.
- Focus on "easy wins" first so each dollar invested brought maximum gains.
- Go global quickly to prevent competitors from winning chosen verticals first. Speed matters.

The reason you do all this as an open exercise with the team is for *shared understanding*. By explicitly naming criteria, then sorting, then identifying the reasoning, everyone involved knows *why* something is considered important. This is crucial in building an organization of co-thinkers and collaborators.

Sorting often drives more fact-gathering, such as identifying which teams wouldn't sign up to a bigger quota in exchange for additional resources. When different options impact different parts of the organization differently, the sorting process can spark tradeoffs and bartering. Basically, this amounts to negotiating within

the organization for additional criteria and rethinking "facts," such as how much additional investment is appropriate. In our example, the team then summarized the results of the sorting step into a table that reflected their next level of alignment (see Table 6-1).

Table 6-1. Strategy rationales for country prioritization

Strategy	Market area	Proposed action
Profit	North America, Japan	Keep investment as-is.
Invest for revenue growth	France, Germany, Spain, UK, Sweden	Create a quota relationship between dollars invested and expected quota assignment so growth is assigned with investment commitments.
Market development	China	Early conversations suggest that launching programs in China will take too much investment to enable a fast return. Recommend reviewing decision in 1 year when piracy rates will drop and market maturity will rise.

The sorting step gives you a set of options clearly ranked in terms of your criteria. As the situation changes or new information comes to light, you know what options to favor. For example, if the company was interested in profit first, then they would know which countries to focus on. If they had additional resources, they could invest for future revenue growth. And if they had even more dollars, they could do market development. Options were both ranked (top to bottom) and named with an action so the business leaders could see the available choices.

Take a moment to consider that the sorting step does not merely produce a document. It has a profound impact on the team in the form of a deep and shared understanding of what is at stake. The next step, Organizational Testing, will involve discussions by many team members throughout the larger organization. If a dry

document of sorted options had somehow been lobbed in by "experts," how prepared would the team members be to fully vet the feasibility of various options? Make no mistake: the document is important. But an aligned team is equally important, particularly as you move forward to engage others in your organization.

Step 3: Organizational Testing

Step 3, Organizational Testing, is about maturing the ideas that were ranked in Step 2 (Sorting), based on the criteria developed in Step 1 (Deciding What Matters). In Step 3, you will explore how those ideas can be implemented within your particular organization. You do this by floating the ideas by people who can lend perspective on how they will or won't work. Organizational testing is the specific set of activities that explore what conditions exist *in your company* to make one course of action better than another. This step may require you to consider different options for addressing the reality of what exists in your organization. The question for Step 3 is: how do you avoid getting completely bogged down by the challenges you uncover? You may unearth the unexpected, which is why many organizations hesitate to "test" before pulling the trigger. Luckily, we take that obstacle into account in Step 3 of the MurderBoarding framework (Figure 6-7).

Organizational testing is a process of pre-selling ideas to test their ability to work. During organizational testing, you'll uncover operational points of view that didn't arise during the generation of ideas, but will be vitally important for the final step of the four-part Selection phase, Choosing.

The key benefit to organizational testing is that it forces you to think cross-functionally. It helps you avoid the kinds of problems that occur when any business unit or functional area optimizes for their own needs. We've all seen business problems where marketing creates demand at such a high volume that operations can't deliver, and then the company's brand is negatively affected by this poor customer experience. This comes out of siloed behavior. This doesn't mean that all silos are bad. Silos can be efficient when situations are stable, and everyone can focus on their task without being distracted by activities elsewhere. But when it's time

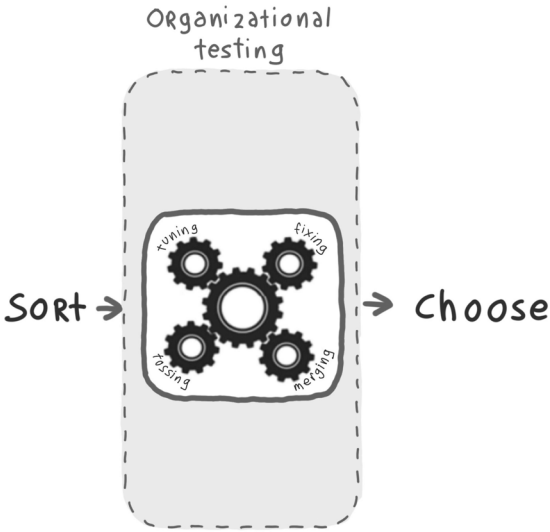

***Figure 6-7**. Step 3 of the MurderBoarding framework: Organizational testing*

for change, silos are one reason why organizations can make poor strategy choices.

Strategy fails when the keys to making a strategy operational cross-functionally are not uncovered soon enough. So by doing organizational testing, you are surveying other parts of the business that could be affected, to see whether a strategy can be implemented or to better understand how the strategy would play out and affect those other business areas.

The kinds of questions you want to ask during organizational testing are typically at the operational level. Does our supply chain support this? Did you think about the implications to our IT team? How will we merge our existing pipeline? Does some piece of this new strategy conflict with existing contractual obligations? Do we have what we need to provide product support in this new region? Each conversation uncovers more data: more details, more criteria for success, and more obstacles. This new information that is uncovered will result in options being improved or dropped from consideration.

> Organizational testing cuts across silos to see what the company can do *when working effectively as a whole.*

Imagine, for example, that a team decides that the right thing to do to enable their next level of growth is to expand into Asia. Before presenting the decision to the senior executives, the operational leader will do an organizational test and bring the idea to the finance leader. The dialog might look something like the following.

Operational leader	We're thinking about going to Asia. We've narrowed it down to Japan or China, but we still need to know more to choose.	*Nice and open-ended. This is where discovery happens.*
Finance leader	Have you thought about currency?	*Bingo!*
Finance leader (cont.)	Because we don't actually know how to support a different currency. We don't do that right now.	
Operational leader	Tell me more about what's involved with a new currency....	*More leading questions.*
Finance leader	Well, I expect we'd have set up a subsidiary to accept local currency; we don't have one yet in China. And how will you take orders? Direct or online?	*Turns out the finance leader has done some thinking already too.*
Operational leader	Both are interesting....	*Short answers, keep them talking!*
Finance leader	Will inventory levels require us to set up an exchange rate hedge?	*Another discovery!*

Organizational testing is essentially intelligence gathering to collect a set of frank, detailed comments—positive and negative—

from the organization. As any tactical commander worth their salt knows, you have to do your recon before heading onto the battlefield. An organizational test generates a new list of requirements that the team must manage to:

- Modify ideas
- Kill them outright
- Come up with new ideas

This is typically the messiest step of the MurderBoarding framework, and it can be frustrating to reach the middle of the process and realize that you need to adjust your criteria *yet again* (Figure 6-8). Try not to get discouraged! Strategy creation is inherently a messy process. It's supposed to be; you're inventing the future of the company. This is exactly the time when you need to trust MurderBoarding. Have faith that this iterative process of tuning ideas and criteria drives convergence and makes the difference between fair strategy decisions and great ones. Having this step be time-bound (say, for one week) is useful because it helps everyone stay engaged.

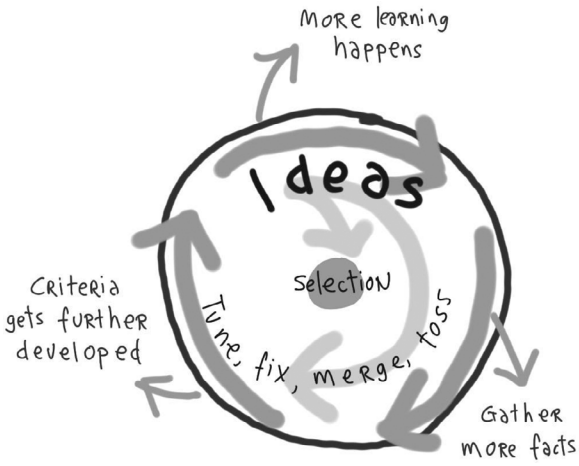

Figure 6-8. *Organizational testing can be highly iterative and messy*

Step 3a: Reshaping ideas

A successful organizational test typically prompts some additional evaluation of your ideas. Based on what you learn, you may need to reshape an idea and then drill down again to confirm its via-

bility, which in turn may uncover more details, which then may require additional configurations.

Reshaping an idea is essentially a process of:

- Pulling components apart
- Understanding what parts are distinct
- Segmenting out things that no longer matter
- Getting rid of redundant options
- Restating the idea as something that more closely fits what you need

Figure 6-9 describes several ways that ideas can be shaped, including splitting a single idea into multiple ideas, adding distinctiveness, segmenting, culling variants, and restating. These help people to develop a shared, clear understanding, which will be incredibly important when they are doing the tasks.

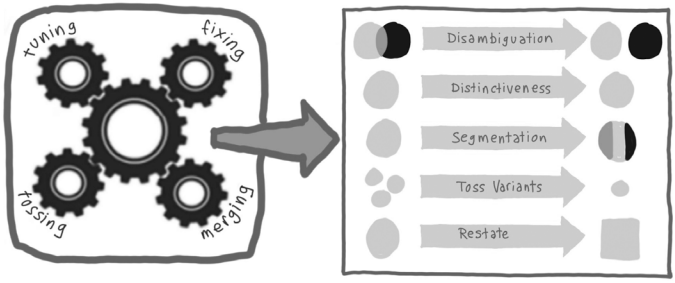

Figure 6-9. *Details of reshaping ideas*

Being able to reshape ideas is critical to selecting your preferred strategy. In fact, reshaping good ideas based on new information is so vital that Google, a company known for allowing many to innovate, includes it as one of 18 principles baked into the company model.

Jonathan Rosenberg, Google's SVP of Product Management and Marketing, recently spoke to his alma mater, Claremont McKenna College (CMC), and had this to say about reshaping ideas:

> *The next big idea is to morph ideas.... I've talked about how different inventions come on, and we don't foresee their real economic impact for some time: the transistor; the laser; the VCR. I also talked about the steam engine, which was origi-*

> *nally developed for pumping water out of flooding mines, and once you connected it to the railroads, basically you tamed the west. There are all of these technologies that are proposed as point solutions to very narrow problems.*
>
> *What we have today is fast change with the underlying technology: the CPU power, the storage requirements. You're constantly revisiting ideas that didn't work before and reapplying them. Blogs were originally about publishing information so that people could reach niche communities. But the whole blog systems that we developed are now the engines behind publishing information in Google docs and spreadsheets, which is the next evolution for those of you who are using Gmail.*[2]

The philosophy and approach that Jonathan describes for product reinvention is exactly what happens during Step 3 of Murder-Boarding. As you learn more, you go back to original ideas to morph them. You blend many ideas together, or you take one part of one idea and merge it with another. The final picture may not look like any one element that entered the process, but that's perfectly all right.

It should be noted that as you refine ideas, you can decide to fix part of an idea or not. By making these refine/fix decisions as a team, you will not only make more informed decisions, but you will also eliminate doubt for many people within the organization when they later make interdependent decisions. For example, a team expanding from consumer software to enterprise selling may uncover that their ordering systems are not set up to handle enterprise-wide order-taking. Instead of killing the idea, they may simply decide not to fix this problem. They may decide that instead of investing in a $50M IT system, they will outsource the order processing for enterprise deals.

By contrast, a team wanting to do business globally may discover through its Finance department that they are legally required to set up a separate entity to process local currency. The team may decide to invest in this separate entity because *not* doing it is a deal-breaker for the idea, and the idea is compelling enough to

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[2] Source: Video of Jonathan Rosenberg at Claremont McKenna College on March 19, 2008.

Decoding

You need to decode what people mean and understand the nuances of options so you can tune, fix, toss, or merge them. There are five common elements of decoding:

- *Disambiguation*. Often a term may mean different things to different groups. Localization means one thing to Software Development and another to Fulfillment. Disambiguation means eliminating fuzziness in speaking or writing so that everyone will understand it in the same way.
- *Distinctiveness*. Shave the fluff off an idea so that its unique, particular information is distinctly called out.
- *Segmentation*. Often ideas are nested within a larger item, but to fully understand the flavors of any idea, it needs to be broken into different parts.
- *Tossing variants*. Narrow what you are talking about to the discrete item that matters. Customization is a big term, and customizing software is different from customizing a physical package. If you care about only one of these, be sure to exclude what you don't mean.
- *Restatement*. As a conversational tool for testing, restatement can help make sure the situation is well defined. Have you ever had a conversation with someone where you thought you both were talking about the same thing, only to later realize you each meant something entirely different? Restating an idea is a way to uncover these potential misunderstandings before they cause problems.

justify the investment. The point here is that trade-offs are an essential part of this tuning, fixing, tossing, and merging process.

Eliminating doubt allows for the speed to move forward.

The beauty of this process of tuning, fixing, tossing, and merging is that once an idea is ready for selection, your whole team will know, *beyond the shadow of a doubt*, that this idea has been made the best it can be with respect to your organization and your circumstance. Your team will have engaged in the rigorous debate of ideas, tearing them apart and reassembling them in new config-

urations, and discussing what works and what doesn't. They will have asked all the critical questions, so that when you do select one final strategy in Step 4, everyone is clear on the reasoning without a shred of doubt.

Because MurderBoarding requires a team to test and refine ideas carefully, a particular idea can become so lightweight that it no longer retains its power. Be sure to ask yourself: Is this idea elegant and powerful in its simplicity? Or is it simply hollow and empty of value? If it feels lightweight, it might have gotten that way because people discarded its challenging aspects in order to avoid debating its complexity.

Remember that it takes strength to be open to new ideas. It takes courage to rethink ideas that you may have already invested in, or to sign on to a truly powerful new idea. Be sure to stay patient as you test ideas in the organization, and try to stay open to altering ideas as you learn more. Also keep in mind that there may never be enough data. Strategic decisions involve incomplete or changing information, so learn to make a choice given what you know, and identify triggers so that you can reevaluate if you learn more down the road. Stay as flexible as you can, and be ready to trim away things that might be good but not great.

The output of the organizational testing step is a set of reshaped strategic options with a reasoned understanding of what it will take to deploy each option (resources, people, costs, time, etc). In addition, Step 3 has the curious extra benefit of creating even more permission for people to highlight or appropriately fix any problems when they come up later. MurderBoarding empowers people to be more responsive later and avoid the dysfunctional, passive, "it's not my job" bystander behavior.

Step 4: Choosing

Step 4, Choosing, is the last and most crucial step of the MurderBoarding framework and how you complete the Select portion of QuEST process. If you have performed MurderBoarding correctly, the right strategy for your situation will be clear to you and your team by the time you reach this step. You will know that you have a strategy that meets your explicit goals, and you will have thoroughly explored the implications of this strategy throughout your organization. Everyone will know the reasoning behind why

this strategy was selected over the others and what makes this strategy best. Choosing is a remarkably straightforward step in the MurderBoarding process because of the work done in the preceding steps. In organizations that lack the MurderBoarding process, choosing is much more painful and tricky.

It is human nature not to want to end something that looks viable or already has momentum. But choosing is about the survival of the fittest, and only the absolute fittest. Remember, by choosing what to do, you are also choosing what *not* to do, allowing the winning options to thrive. Many people wonder what to do with the options that did not get selected. I've found that if you refer to "killing" them, it can cause some backlash in some cultures. OK, so don't kill them. Simply set them aside, for potential future use. Just as it is hard to prune a rose bush when there are flowers blooming, it is hard to make these decisions. This is because the act of cutting can appear to be destructive rather than constructive. But the difference between one strategy option and many options is the difference between winning and simply being in the game. Reframe MurderBoarding as a constructive process, and be willing to convince reluctant people.

Let's look at the MurderBoarding framework as a complete picture (Figure 6-10).

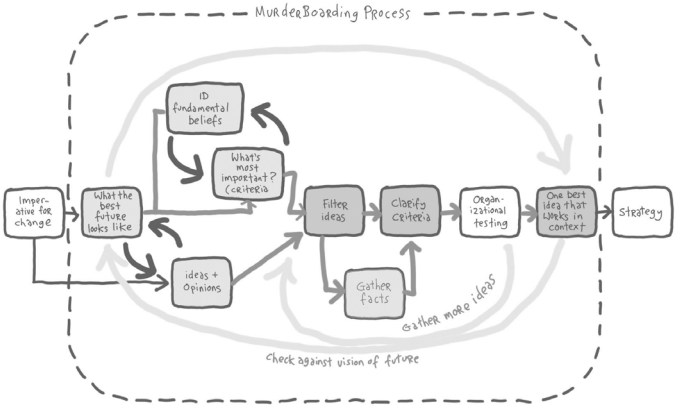

***Figure 6-10**. MurderBoarding overview*

After performing the multiple steps of MurderBoarding, you'll have both organizational alignment and organizational commit-

ment. Everybody on the team will be able and willing to state what the strategy is, and how the key criteria explain why that strategy was chosen. That's incredibly powerful, and it also necessitates that our responsibilities be clear.

Our Respective Roles and Responsibilities

It's important that everybody knows the key parts of their roles. Table 6-2 illustrates your main responsibilities in Selection phase, as well as those of your team.

Table 6-2. Selection phase delineation of responsibilities

Leader's role
• Be the facilitator of the whole process. Manage the framework process for others.
• At first, your job is to get clarity, not agreement. So ask, "What else?" What else would we need to resource here? How do you understand that to work? What else do we need to change in the company to support this idea? What additional conversations do we need to have to be sure this idea will work?
• Make sure necessary debates take place. Take the contra-position on an idea everyone supports. For example, "We all love this particular idea, and we're already looking at ways it can work. If we were to kill this idea, what would it mean?" Or, "We're all in love with this notion, but before we marry this idea, let's spend time figuring out where it would fail."
• Be attentive. Stay present and listen when someone has to let go of an idea he has built, lobbied for, or worked hard to ideate. Often people will hold onto their "baby" until they believe that you hear them and understand them. Pay attention to people's emotional needs around their ideas and offer your compassion, so that they can feel heard and find a way out of their own gridlock.
• Identify what is out, being parked, or killed. Name it so people can internalize the decision.
Collaborator role
• You are a co-thinker, not a champion of one idea or one function.
• Discern what can be added/shaped/eliminated.
• Be willing to let go of your favorite ideas. It might be your baby, but it's not an actual baby.
• Be a collaborator in building up the best idea (for the organization as a whole) together.
• Ask a ton of questions so people's *shared* understanding grows.

To be sure, during the process of developing a new strategy, you will see many possible options for addressing your problem. How-

ever, choosing the right strategy means selecting one that embodies a single, unified, coherent set of choices.

Part of your responsibility is to make sure that everybody is crystal clear about the reasons the final strategy choice is the right one. It will be far easier to get everybody in the organization to commit themselves to actions that align with the strategy when they understand it and feel like they've been part of the process. As we've covered in different parts of the QuEST process, openly documenting key decisions is crucial. Publishing key decisions reinforces the choices made by everyone who was directly involved in the process, and it significantly improves the communication with others who were not actively included.

The leader's final role is to "make the call" when needed. If and when your team finds itself at an impasse as to which strategy to select, it will be your responsibility to make the final decision. Sometimes this means that you need to paint a compelling vision for the team, and sometimes it means that you have to "burn the boat." Burning the boat means being willing to destroy the precious vehicle that kept you safe as you crossed uncharted waters. It's about creating a reason to do something dramatically different. It works because it helps to motivate people to move from the current, comfortable state to the more unknown, unchartered space. (See "Burning the Boat" in Appendix A.)

Most of the time, after traveling through the collaborative strategy process together, you and your team will end up agreeing about which strategy is best. However, sometimes this is not the case. Either way, the decision about which strategy to pursue is ultimately yours to make. Take special care to do this in such a way that everybody on the team understands why the decision is being made.

Sequencing

The newcomer to MurderBoarding may believe that signing on to this framework will mean endless meetings and "design by committee." So it might help to know there are times for 1:1 meetings, time for group deliberations, and certainly a cadence of meetings that works to set the pace.

The MurderBoarding framework can be applied to many different types of strategies—business, channel, product, market, pricing, etc.—but to describe the flow of forums, let's walk through an example using the product strategy type.

In Step 1, Deciding What Matters, the product manager would set up some 1:1 meetings with key experts in the business and influential people who have an insight on what should shape the strategy criteria. These are 1:1 meetings, but this stage can happen quickly if planned well. The idea is to have private conversations to gather information, anonymize contributors so the issues can be discussed openly (if needed), and then share a document of key findings, either as an email or an official report.

In Step 2, Sorting, the product manager would then bring together the involved parties to sort options against criteria and filter them into buckets. This becomes a way of learning which trajectories could be followed. This step typically consists of two meetings, and produces a work document that can be reviewed with the business unit head or general manager as appropriate.

In Step 3, Testing, the product manager or her operational leader would pull together the cross-silo review to do more discovery and shape options. Often this can be done by having the cross-silo staff work 1:1, to understand what can be done and what is needed. Then, they would report on those findings to the decision makers, who shape the strategic options based on what the organization is willing or unwilling to do.

In Step 4, Choosing, the operational leader brings together the necessary functional heads, typically in an already established forum, such as a quarterly business review or an exec team staff meeting, to review strategy recommendations.

The most important part of sequencing is to make sure each person who participated in the earlier steps is updated on what took place. This maintains alignment from concept through decision.

Table 6-3 captures the steps and some key forums, and summarizes the outputs.

Table 6-3. Sequencing steps with roles, forums, and output

Step	Who	Output			
	Initiates	Consults	Decides	Forum	
Decide what matters	Product manager	Experts and multilevel influencers	BU head/GM	1:1 meetings	Discovery document shared broadly
Sort	Product manager	Sales VPs, Director Engineering, Director Marketing, Managers	BU head/GM	1–3 group meetings	Filtered ideas sorted into buckets
Test	Product manager or operational leader	Cross-silo senior staff	Cross-silo VPs/GM	1:1 plus 2–3 group meetings	Identified organizational interdependencies and reshaped strategy options
Choose	Operational leader or GM	Functional heads (CTO, CMO, Engineering VP, senior staff)	CEO/Board	Larger operations meeting for transparency, participants witness how decision gets made	Strategy with transparency on why "best" options

The entire sequence of MurderBoarding can take as little as 2–3 weeks or as long as 1–2 months, depending on the complexities of how many people are involved and the impact of the decision. But, unlike what we sometimes fear, it won't take forever.

Successfully Performing the Selection Step

MurderBoarding is about making the best decision as an organization, for the good of the organization. To manage the inevitable messiness, here are some guidelines that can help make the whole process proceed more smoothly and effectively:

- Keep the end in mind. The goal is to select the one powerful, inclusive, and complete strategy and kill off the others, so that one gets the attention it needs to thrive. Remind people of this end goal as often as you need to.
- Be time-conscious. Allow reasonable time for people to come up with ideas and criteria, but be quick to cut off discussions that rehash closed topics. Discourage deep investigations into issues that won't matter much either way. Notice when the new ideas have slowed or stopped entering the conversation, like when the popcorn is done popping. Maintain the message: we need to do the full process. And remember that you need to do it quickly, or people get into the mindset that collaboration really isn't worth the time investment.
- Set the ground rules. Since this process is about the best idea winning, ask people to agree to let go of personal ownership of ideas, political games, or wishing-it-were-true. Ask them to enter the exercise with an honest intellect and clear vision. Encourage them to ask tough, realistic questions.
- Use anonymous judging when needed. Especially when probing the depths of team beliefs, feel free to let people contribute or vote anonymously if you believe it will help the team be more candid.
- Move the nonviable (recently killed) ideas to a physical list, wiki, or other container (away from the main list) that you can come back to later. Since certain people may be attached to ideas that they worked hard to propose, putting these ideas in a "place" reassures them that their ideas are being shelved for now instead of being left for dead. This often allows people to move on to the next task at hand. This list is also useful to have as a reference, because occasionally you will find that a rejected idea resurfaces as a winner after it is revisited and refined.

- Merge/build new ideas. Use the talent of your group to tune your ideas to your specific situation or come up with new variations (optimized to your outcomes). The idea isn't to kill each other's ideas, but rather to build on each other's ideas.
- Turn over lots of rocks. Test your ideas with other people. To offset your closeness to your own situation, request that outside colleagues be your audience as you frame the options. Ask them to role-play people in your eventual key audience and invite them to test your thinking. Encourage them to ask you "zinger" questions. This is an opportunity to test your thinking once again.
- Make the call. Choose the best alternative and say it out loud. Build your muscle for saying "this matters more than that."
- We'll talk about how to handle conflict in these discussions in Appendix A. It's very important to know how to make use of and manage tension in these discussions.

The beauty of the MurderBoarding process is that once you select a best idea and implement it, you will be able to reach new goals. Over time, selecting and developing new ideas will allow your organization to coalesce around a business focus as strategies cluster and gain momentum (Figure 6-11). Of course, the business will constantly flex, and strategies will need to be updated as the organization responds to market opportunities. You will be able to create the capacity within your organization to reinvent itself collaboratively from the inside out.

- Above all, remember that strategy is not a strategy until you've chosen something. You must choose what to do and what not to do, and you must make your decision knowing that your organization can realistically implement it. A strategy that you can't act on is just a massive anchor holding back your organization's progress.

Moving On

Let's put to rest the notion that the goal of strategy creation is to get one big win. The ultimate goal is not to win once, but rather to build both the capabilities and capacity that power our organizations to win *repeatedly*. In other words, getting strategy right depends on creating the conditions that let us outshine our com-

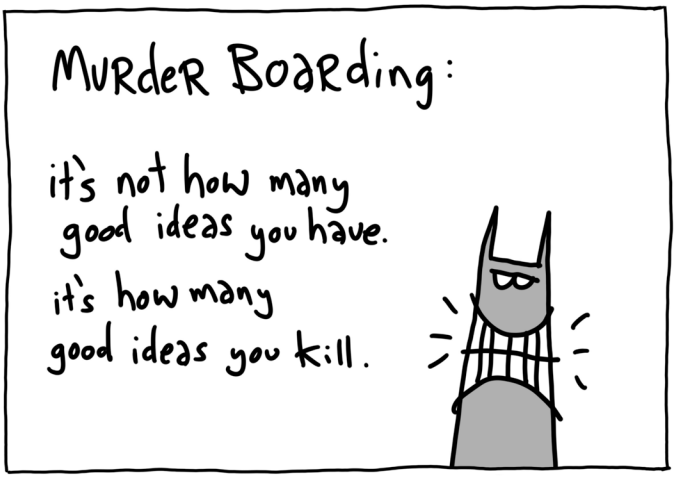

Figure 6-11. *When we choose to kill options, we can keep the best ones*

petitors, and to outshine them on many levels—to out-think them, out-create them, and out-innovate the other players in the market. MurderBoarding plays into that specifically because it allows you to organizationally collaborate, pick from a relevant set of ideas, and then quickly and efficiently make decisions in the open. The framework of MurderBoarding allows a whole organization to *think* and to make tough qualitative decisions, which is the key to winning strategies.

The MurderBoarding framework can be challenging because it is our human nature to resist squashing something that looks viable or is already in progress. Killing an idea or program with momentum can also be very difficult to explain and justify. And although many leaders take the "let's cut equally" approach in order to share the pain, let's remember that even though it might be easier to spread the pruning cuts uniformly across the tree, the result would devastate the tree's ability to bear fruit. It's the same with business. It's hard to do selection because it forces clarity, and you will need to make difficult trade-offs. However, it's better to do that early, with focused effort, so that downstream results are aligned. Otherwise, your strategy is based on the hope that decisions made later by others will get you where you need to be.

You haven't reached the finish line yet, but you've made a lot of progress. Once you've done the hard work of the Select phase of the collaborative strategy QuEST process, there is still one more

phase before execution. The Take phase is about ownership and responsibility.