



The Pivot **Orchestrating Extraordinary Business Momentum**

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Author's Bio: Lori Michele Leavitt is founder and President of Abridge Corp. Her leadership services are delivered through business and performance coaching, leading peer groups, and consulting for M&A due diligence and turnarounds. Abridge software, branded as Aligned Momentum, has catalyzed momentum for organizations with thousands of employees. Her remote monitoring company was the first to enable cashless water vending in Africa. Lori speaks globally, to groups from 10 to 2000 on performance momentum and culture change. She has an MBA and certifications in speaking, coaching, facilitation, management accounting and financial management. Her favorite role is as Emily's Mom. She's proud to be a Rotarian and is currently a member of the Rotary e-Club for World Peace. Lori loves adventure, strategy, creating, connection and deep conversations.

Authors' big thought: It is possible for any business to be vibrant and nimble; highly valued, ahead of the competition, and a great place to work. Being vibrant and nimble is also possible for any person including you, the leader. Most of us need a few concrete steps to get us moving forward. This book provides guidance and best next steps for you and your business to take from whatever position you are in today. This book is your catalyst for gaining momentum.

Recommendation: This summary is meant to whet your appetite – I cannot possibly do this book justice. *The Pivot* is an amazing and practical book with many vibrant stories, diagrams and recommendations for how to pivot **from** where you are now **to** where you want to go to be a nimble focused and extraordinary company,

Notes:

Introduction:

- **The Pivot** describes a method for readying many people to initiate changes that in alignment with the organization's strategy. And that, over time and when well-orchestrated, generate extraordinary business momentum – even performance breakthroughs.

- When you see Pivot (capitalized) in the following pages you will know that it refers to a method to carefully plan strategic change. When you see pivot (lower case) you will know that this refers to an attempted turn –on-a-dime change.
- A pivot may be *heroic, egotistic* and/or *desperate*. It is always reactive,
- The Pivot is not a turn on a dime pivot, which may be perceived as heroic, but is rarely successful. E.g. Ernest Shackleton best known for his Imperial trans-Arctic expedition on the ship *Endurance*. (Leavitt tells the story exceptionally well).
- *Are you the hero who allows risk to become unbearable so that you can save the day? Or are you ready to take up the gauntlet of true leadership, and the orchestration of extraordinary business momentum?*
- A great leader feels no need to be the hero. A great leader builds a team and supports them being a hero in their role.
- The better way to succeed with change is to Pivot, with the leader orchestrating many small shifts made by well-prepared people who have been empowered by knowledge and resources.
- Alignment is realized through small shifts that keep bringing business performance back on track with strategy.
- To enable a healthy culture requires leaders who care about bringing others across the finish line with them. This is a culture with Aligned Momentum. Aligned momentum allows you to build leadership at all levels in the organization: It reengages people who are not performing at their best; it opens lines of communication; it allows strategy to inspire change organization-wide; and, it results in the company being committed, collaborative, innovative and quick. When Aligned Momentum thrives in your organization, you will experience extraordinary momentum.
- As a leader, you want to gain and sustain momentum in your business. You know that you need alignment so that momentum leads to a shared vision. To execute brilliantly and make breakthroughs possible as you move forward together, you will orchestrate The Pivot.
- In the following chapters, Leavitt will share the six Aligned Momentum Key Indicators that indicate that your business is positioned to gain or sustain momentum:

Indicating brilliant execution:

1. **Clarity** – getting clear, being clear (about strategy, including vision, purpose, values and direction).
2. **Mastery Mindset** – open growing mind
3. **Nimble Decision-making** – best next step.

Indicating readiness for a better future:

4. **Strategic Thinking** – play the movie (think through to the likely end before a judgement call).
5. **Talent Adaptability** – roles fit strategy
6. **Coaching** – manager as coach.

Part1: Set the Stage

Chapter 1. Aligned Momentum

- A culture with Aligned Momentum indicates the business is nimble, and able to Pivot.
- With a well-orchestrated Pivot, extraordinary momentum and performance breakthroughs become possible; otherwise your business faces incremental improvement only, and is at risk for a stall.
- To maintain alignment, change is often required. Aligned Momentum is not about fixing those who are not meeting your expectations. Aligned Momentum is possible only with your true leadership, full commitment and participation.

- Taking best next steps, and change, toward a desired future will involve taking some steps that don't work out.
 - You have alignment when every employee is clear about how their performance impacts the organization's performance.
 - You have momentum when every employee is taking their best next step toward fulfilling strategic objectives.
 - Aligned Momentum describes a workplace where people and the company are aligned, and gaining momentum in meeting strategic objectives.
 - To realize your strategy, and even before attempting a Pivot, you must ensure that each person you are relying on to execute brilliantly knows they are valued and trusted in their role. They know that a person who can influence their success (typically their manager) cares that they are successful. They also are empowered to initiate change. Then, create a bold strategy that fits the purpose, that "why do we exist," for your company, and get very clear about how you will communicate it, what success looks like, and what progress looks like.
 - These Key Indicators will help you track progress toward Aligned Momentum:
 - Clarity, Mastery Mindset, Nimble Decision-making, Strategic Thinking, Talent Adaptability and Coaching.
 - Aligned Momentum exists when:
 - people know they are valued and trusted;
 - the strategic plan (strategy) is bold and purposeful;
 - people are clear about strategy and their part in it;
 - excelling in one's role also meets personal goals;
 - the Aligned Momentum Key Indicators are strong and consistent across the company.
 - In a culture with Aligned Momentum, changes initiated by many, aligned with strategy and well-orchestrated in a Pivot can lead to breakthrough performance.
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- **Chapter 2. Mastering the Pivot**
 - The Pivot is a well-orchestrated change over time, comprised of smaller changes or shifts initiated by many people. Mastering The Pivot is critical to extraordinary business momentum and makes performance breakthroughs possible.
 - A successful Pivot is planned and well-orchestrated. The leader orchestrates the many changes that empowered and strategically clear employees initiate.
 - For the purposes of achieving Aligned Momentum, you want to think of a Pivot as small shifts made by many people that only appear to be a single shift because they are so well orchestrated.
 - The Pivot does not involve: - turning on a dime; - a show of heroism or of desperation; - top-down commanding, or even telling or selling.
 - Once your company grows beyond the small startup phase, turning on a dime is truly an act of desperation and rarely works.
 - Aligned Momentum is about aligning people to do the right things in support of strategy. The least painful and most effective way to achieve this is to enable The Pivot in your company. This takes preparation. The term "weaving" is used to create a visual of effective Pivot preparation and the ongoing attention to sustain it.
 - If you want to master The Pivot, you must pay attention to the foundation before you start. Masters do the work. They are prepared and they practice. Being culturally ready is critical to mastering The Pivot.
 - The Aligned Momentum Key Indicators keep you on track. Before you start, you will enable three cultural truths:

- i. It is safe to step up and speak out. A safe culture is one where every person knows their manager has their back and wants them to be successful.
- Every employee, even an executive, needs a manager and/or a coach discovering what they want and holding them accountable in a way that shows they care about that employee's success.
- ii. Employees are empowered to initiate change. Empowerment requires letting people be, and giving them the tools, direction and support to do their best. Any person can be trained to think strategically. Mastering The Pivot includes creating an organization-wide process by which employees can initiate change.
- iii. Strategy is clearly communicated. Communicate for understanding. Observe. Listen. Communicate again, a different way. And again...
- As a leader, you orchestrate performance. Orchestrating involves: - creating a focal point rather than telling people what to do; - ensuring clarity for each individual, and - inspiring through vision rather than work intervention.
- Pivot as a leader from complacency to mastery. Master leadership and The Pivot.

Chapter 3. Change the Context

- You can't change a person, but you can change their context.
- In an organization, each employee's context is often defined by that organization's structure, their role in it and the social norms of that workplace. How an organization is structured influences those who work there.
- A common impediment to Aligned Momentum is having an organizational structure that no longer serves you or your people. To be nimble in your business be prepared to Pivot and adapt structure to best fit people, work, and strategy.
- Envision the structure that will best fit your strategy.
- These organizational structures are common and may help you envision the structure that will be your best fit: - Hierarchy - Matrix - Flat - Open.

Hierarchical Structure

- A hierarchical organizational structure has been in use in business for decades. This structure lends itself well to efficient one-way top-down communication and supports predictability and repeatability of daily work. Bottom-up communication is possible but typically very slow.
- The hierarchical structure is meant to yield consistency, predictability and minimize risk. Decisions are made at the top and communicated downward through levels of management to all employees. Some benefits of hierarchical structure are that reporting lines are clear and career ladders are clear.
- Aligned Momentum can live in a hierarchically structured organization if managers cultivate a safe workplace culture.

Matrix Structure

- A matrix organizational structure weaves project or product teams into the hierarchy. Employees still have their respective functional divisions and a manager of that division to report to and turn to for career advice. But for many employees, their day involves significant time on one or more project or product teams, along with employees from different functional divisions. There is a reporting hierarchy and also cross-functional teams.
- Collaboration happens more naturally in a matrix structure, compared to one that is only hierarchical, due to the necessary communication across divisions for product or project work.
- Setting and communicating priorities to employees can be more complex in a matrix than in a hierarchical structure.

Flat Structure

- A flat or horizontal organizational structure has fewer managers compared to a hierarchical or a matrix structure, and a higher degree of autonomy for all. In the purest translations of a flat structure, all employees are empowered to make important decisions for the company—that is, they follow the model of individual self-management.

Open (or Network) Structure

- An open structure pulls the informal networks that form even in a traditional hierarchy, infuses organizational authority into those networks, and drops the hierarchical structure. Most often there are a few managers or team leads in an open or network structure.
- The aims of adopting this organizational structure include: • the strengthening of shared values; • free-flowing information and feedback; • Nimble Decision-making; and • rewarding people based on their merits and use of a Mastery Mindset, rather than on position.
- An open structure is comprised of teams grouped into multiple and often overlapping circles. An employee may be on several teams, and teams can form and disband based on the work to be done. Often a key component of a successful open structure, one that best avoids employee confusion, is self-direction.
- Aligned Momentum exists when: • the strategic plan is bold and purposeful; • people are clear about the direction and their part in it; • people know they are valued and trusted in their role; • excelling in one’s business role results in fulfilling one’s intrinsic, personal needs and goals.
- There are Pivots you can orchestrate to bring more nimble practices into your organization, without any change in its current structure.
- Pivots when structured as a hierarchy:
 - Pivot **from** top-down communication **to** a more lateral communication style.
 - Pivot **from** commander **to** coach.
 - Pivot **from** traditional performance management with only infrequent reviews **to** frequent performance conversations.
- Pivots when structured as a matrix:
 - Pivot **from** conflicting management styles and direction **to** team leads who are expert resources yet will leave management of people to each employee’s functional manager.
 - Pivot **from** know-it-all fixed mindsets **to** Mastery Mindsets.
 - Pivot **from** managing work and roles **to** managing people with managers who are trained to coach.
- Pivots for both flat and open organizations:
 - Pivot **from** no traditional management roles **to** managers-as-coaches.
 - Pivot **from** disparate team goals **to** teams aligned toward shared strategic objectives.
 - Pivot **from** lack of Clarity in direction when self-managed **to** some structure of peers-as-partners or managers-as-coaches that supports Clarity and accountability.
- Once you have a clear vision of the organizational structure that will best suit your business to execute its strategy, you are ready to gain momentum.

Chapter 4. Gaining Momentum

- When momentum builds, breakthroughs can happen.
- A breakthrough is a dramatic achievement. It may seem like magic—an instantaneous success—yet, in fact, a breakthrough usually comes after intentional focus and consistent effort have been applied over several years.

- Business breakthroughs most often happen through people. Only when the right people are committed to achieving the best results possible in line with a shared vision can business breakthroughs happen.
- Business breakthroughs most often happen through people when they are committed to a shared vision.
- Commitment to a shared vision is strongest when the work to be done is aligned with an individual's purpose (personal and professional).
- Feeling engaged and alive shows up as commitment.
- Breakthroughs aren't magic, yet they defy logic. They:
 - happen when the focus is on the future with a clear vision, without knowing exactly how to get there, and without telling everyone how you (the leader) expect them to get there.
 - don't happen when applying a traditional, logical, history-based approach to moving forward.
- Personal Brand Alignment is too often overlooked in business strategy and organizational structure. However, to get every individual aligned and part of your business momentum, they must be personally involved and invested.
- When the questions related to accountability, commitment, trust can be answered with ease, your workplace culture is primed for success with Aligned Momentum and The Pivot.
- What is required to "Set the Stage" for The Pivot and Aligned Momentum is commitment to Clarity around what professional and personal success looks like.
- Committing to a change requires choosing to change.
- When people have a Mastery Mindset, are Adaptable, and have the skills to make Nimble Decisions, they'll commit to your bold new strategy more readily, and change will come more naturally.
- Today, a top-down structure can become a stranglehold if not adapted to the realities of the global marketplace.
- To strengthen the internal and external networks powering your business, knowledge must be shared and the individuals stepping up to lead throughout the company need to be able to communicate change quickly and clearly.
- To experience Aligned Momentum the leader and leadership team must Pivot from wielding power based on authority to having influence based on positive modeling.
- Simplify what it takes to orchestrate change by stepping back and letting your aligned and engaged employees reach performance breakthroughs naturally.
- If your company is not keeping up with the market or the times, the first Pivot may have to come from you.
 - Align your personal vision, values and strengths with your brand
 - Align your brand with a definition of success
 - Align with your role
- Rigidity can lead to a lack of employee engagement or even to disengagement; it drains energy and leaves no room for individuality. Not feeling committed to one's work drains a company of its momentum.
- Weaving Personal Brand Alignment Into Your Culture:
 - Keep job descriptions current: including yours
 - Stay calm during change
 - Aim personal ambition toward mastery, not perfection
 - Understand belief systems

- The leader must model the way. You (the leader) create “the tone at the top.” Knowing that you can generate extraordinary momentum and create performance breakthroughs in your business should be more than compelling to orchestrate Pivots.

Part2: Share the Vision

Chapter 5. Clarity

- Clarity, as defined for Aligned Momentum, is the quality of being clear, as in the quality of being coherent and intelligible, of being easy to see, and of being certain. In business, you must get clear about where the company is headed, and the strategy, and then you must be clear when communicating this to others so that they might execute brilliantly.
- Clarity is the most critical Aligned Momentum Key Indicator (and merits a full chapter).
- If well-meaning people are not clear, they will first do their best at whatever they think they are supposed to do and then they may get frustrated, create conflict, etc.
- To take the best next steps, you need to have a clear vision and direction, and you need to get clear about where you are right now. **Gap Assessment** can help. Assess, then close the gap between what is and what’s desired.
- If a decision considers a change or state, from ____ to ____, then the Define and Discover phases of Gap Assessment will serve you.
 - Don’t skip a step in the gap assessment process described in this book.
 - Don’t tell or sell what is or what is desired.
 - Don’t assume you know what is.
- Gap Assessment is a tool for The Pivot. It helps you discover a current state and ensures you receive feedback in an iterative process.
- Leaders need to clearly communicate strategy (including the vision). Articulate your vision in a straightforward statement that all employees can understand and identify with. A vision statement describes your organization in its future successful state. It creates a mental image of what the organization wishes to achieve over time; something to become rather than something you already are.
- To create a shared vision, the vision created by the leader or leadership team must engage all employees. It is the shared view of the future that will then be brought back into the present to form part of the business’s strategic objectives and quarterly priorities. When the vision is truly shared, employees will execute the company’s strategic priorities well.
- Assess your vision statement with three criteria:
 1. Is it simple enough to be clear to anyone?
 2. Is it purposeful in a way that strengthens alignment between strategy and what people are excited to do?
 3. Is it likely to inspire a step-up, even a breakthrough, in performance?
- Themes help simplify communication of the best next step closer to your vision.
- A true leader doesn’t leverage power of authority when sharing a vision, but rather seeks to positively influence others into action.
- A clearly communicated strategy—vision, direction and execution plan—enables the right things to be done right and in the right amount of time. How you communicate will have a significant impact on

how well the strategy is executed. Consider your communication style and the completeness and frequency of your communication. You will be modeling the way for others. Then, you orchestrate The Pivot throughout your organization by first empowering more leaders, so you will have greater confidence in their ability to communicate. You've shown them, and will continue to be a model of, how to be an inspiring communicator.

- Managers and their teams must get clear on how to best execute the strategy. A 2015 Gallup survey of American workers found that clarity of expectations is the most important asset of a good manager and that employees who meet regularly with their boss are three times more likely to be engaged on the job.
- You can orchestrate Pivots starting today to gain Clarity. One of the following may lead to a step up in performance for your business.
- *Pivot to a Culture of Trust* as a cultural core value or norm. Clarity is not effective without trust. To build trust, shift from only telling managers (directly or indirectly via their budgets) what needs to get done, to including managers and coaching them to identify their fit and their team's fit.
- *Pivot to more Effective Management Meetings*. An effective management meeting brings peers together to work through challenges and opportunities with a clear agenda, facilitated (even if by a selected peer), consistently scheduled (preferably once a month) and held within an environment of trust. One Pivot is from managers battling for their share of budgets, visibility and merit pool dollars, to collaboration of peers who seek success for each other within and for the organization.
- *Pivot to targeted Training for Aligned Momentum* Aligned Momentum training develops Clarity, Mastery Mindset, Nimble Decision-Making, Strategic Thinking, Talent Adaptability, and Coaching.
- Training for these "soft" skills requires a different type of training than is typically offered to employees; this training requires powerfully facilitated interaction, preferably in a small group of non-competing peers. Pivot from focusing on skills and knowledge, to embracing and developing the whole person.
- *Pivot to a Coaching Culture*. Aligned Momentum needs to be supported by great managers. The best training to grow performance-coaching skills is to be coached! Provide your managers with coaching so that they might Pivot from managing work and processes to managing people (and delegating the work and processes to the team). Train your managers so that they can coach their team. Remember that coaching for managers and by managers for employees is a first step in creating a culture where everyone knows their manager cares about their success. Such a culture is one where Aligned Momentum thrives.
- *Pivot to a complete, accurate and streamlined Information & Communication Flow*. Pivot from random reporting of what was done (regardless of priority or alignment with strategy) to more effective meetings, performance measurement, and communication that better captures alignment and engagement, information technology that better enables collaboration, organizational structure and design that can move you more nimbly toward your vision, and reporting to close the gap between the wisdom of senior leaders and the talent all the way out at the very edges of your organization.
- *Pivot to a more Nimble Organizational Structure*. Your Pivot may require you to institute a more optimal structure for your organization that is based on current needs and the foreseeable future rather than the past. Pivoting toward Aligned Momentum is a form of organizational redesign: a step-by-step methodology which identifies dysfunctional aspects of work flow, procedures, structures and systems, and realigns them to fit current business realities and goals, and then develops plans to implement the new changes.

Chapter 6. Focused and Simple

- Brilliant execution of strategy requires more than measuring productivity. Being better at what was done last year rarely leads to meeting strategic objectives. In addition to being focused, you need to be nimble.
- Those who are sure they know what to do can focus. But they may not be in alignment with your company or helping your company gain momentum. They are focused, yet they are not nimble.
- A capability that best ensures your business is both focused and nimble is “strategic focus.”
- To be both focused and nimble, empower employees with a clear understanding of strategy and their role in it. Give them authority to adapt work to strategy.
- The attitudes of a manager toward employees are of primary importance. Employees should be able to trust the motives and integrity of their supervisors. It is the responsibility of management to create a productive environment where the company’s values flourish.
- Business momentum is extraordinary when it is gained swiftly. Business momentum is also extraordinary when it is maintained over the long term.

- Growth strategies and focusing on what is core must co-exist. A Pivot to aligning (and re-aligning) measurement with strategy If you find you are focused, but on the wrong things, you may then find that what is being done is not meeting strategic objectives. Focus is missing or it is applied to the wrong targets. The most common Pivot for better focus and execution is to move toward re-defining measurement and tracking to align with current strategic objectives.
- Growth strategies typically require a high degree of thoughtful and broad discernment, especially with respect to any potential impact on culture.
- Thinking you know it all is not the same as being nimble.
- If you’ve lost focus consider a Pivot to:
 - measurement that is always aligned with strategy;
 - more effective, collaborative meetings;
 - growth-for-growth’s-sake to aligned growth (to ensure that growth by acquisition never harms what is core to your purpose and performance);
 - frequent performance conversations for Clarity and accountability;
 - more ways to gain Clarity about strategic focus;
 - the discipline required to lead a great company.
- If what the bulk of your employees do this year is what they have traditionally done year after year, it is time to weave nimble practices into your business.
- When leaders set the right tone and path, work with managers to set priorities, and then communicate and follow through with managers who are skilled in execution... the right things are done right.

Chapter 7. Change the Social Context

- The reality is: Some people will resist.
- You can’t change a person (they must choose to change), but you can change their context at work.
- To position your employees for success they need to not only be clear about what they are expected to do, they must also be clear about how they are expected to behave while at work.
- **Belief:** Belief is the state of mind in which one accepts something to be the case, with or without empirical evidence to prove that something is the case with factual certainty. What you believe drives how you view the world and your place in it.

- Mindset: What you believe to be true about yourself and how life is, and will be, for you. It is about you and you alone.
- People have either a fixed or growth mindset and this usually stems from what they were told and what they experienced while growing up. In general, a person with a growth mindset believes they can develop their abilities through dedication, hard work, and learning from others and their mistakes. In the language of Aligned Momentum, we call this a Mastery Mindset. A person with a fixed mindset views talent as innate or they view themselves today as the best they are going to get; they aren't willing to change or grow.
- Consider what you intend to experience over the rest of your life, and the legacy you wish to live (not just leave).
- **Intention:** An intention mindfully drives action—what you do, create, and generate. Compare this to hope: hope is a starting point, but does not shape your actions. Intention can generate action in how it guides you to pay attention to something or someone, and sometimes indirectly, almost as if by luck. Intentions can also be blocked by beliefs that drive behaviors that run counter to your intentions.
- **Habit:** A habit is a mindlessly repeated action. You want good habits. You also want to be aware of all your habits, so you can decide if they are still serving you. Repetition causes a shortcut in the brain. If what you say you intend to do is not getting done, perhaps you have a habit formed from a belief that is no longer serving you.
- **Value:** A value is formed based on what you believe reflects the “right” behavior. Your values guide you in your personal and professional life. A company has values as well, and these are often outlined as a set of core values or as a basis for how the company, its leadership and employees will behave at work. A true leader I've
- Understanding that each person has entered your workplace with their own belief system, values, mindset and habits will help you be clear about what you expect of them in your organization.
 - Your beliefs become your thoughts,
 - Your thoughts become your words, • Your words become your actions,
 - Your actions become your habits,
 - Your habits become your values,
 - Your values become your destiny.
- You may have habits created from beliefs that no longer serve you. Self-discovery will help you become aware of these beliefs and habits. Then there are steps to take to replace those habits with ones that better serve you. You may need to shed a long-held belief.
- Leaders can leverage a trusted advisor and/or peer group to help them become aware of, and adjust, beliefs that are showing up as habits that do not serve them.
- Leaders can benefit from good habits that run in the background, almost mindlessly.
- **Legacy:** The impact or influence you have on others will determine how you make them feel and how they remember you. This is what legacy means in the language of Aligned Momentum (it is so much more than the traditional definition as the amount of money or property that you leave for someone in your will). Consider how you will show up, both intentionally and habitually, today and in the future. This will define how others remember you after you are no longer here.
- Aligned Momentum will thrive in your organization when each role is aligned with strategy and with each person's purpose (or mission) and legacy.
- Awareness is the key to changing bad habits. Changing habits, even those that no longer serve you, requires awareness that a change is needed, motivation to change, and feedback about progress. A long-held belief may need to be replaced by a better-serving belief, or adjusted to serve your

intentions for the future and best next steps. Awareness is the first step to changing a habit and the belief(s) that led to it.

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- **How to Stop Doing What No Longer Serves You**
- Willpower alone is typically not sustainable.
- Our brains CAN be rewired. Rewiring our brains requires:
 - 1) Awareness of our beliefs that created the existing wiring that has led us to learn behaviors and develop habits. Seek to be aware of, and to understand, what triggers you to act in a way that no longer serves you. Only you can change you.
 - 2) Understanding of what triggers our behaviors
 - 3) Motivation to change. Motivation is a willingness to do something. You want to do it.
 - 4) A concerted effort to change underlying beliefs and to form new behaviors and habits
 - 5) A supportive environment, including social context and workplace culture.
 - Clearly define values and be serious about keeping them alive in your culture.
 - Learn to inspire people to solve problems.
 - Remove barriers to communication and smart work.
- Each of these five components that support change are potential Pivots. You can affect these five components for everyone you lead. And for you, personally, you can change by putting all five components into place.
- You behave according to your beliefs, but your beliefs are not you. You can change.
- It's never too late to reinvent either your business or yourself. You have the ultimate power to take your business to the next level. The choice is yours, no matter what stage your company is at or how you have chosen to lead it towards greatness.

Chapter 8. The Bottom Line

- The traditional measure of business success is “the bottom line,” expressed in terms of net earnings or profits. Too often the bottom-line result just happens, without a clear understanding of why.
- No leader can orchestrate a Pivot without employees who care about best next steps, Clarity about what is desired and what actually is the state right now or a drive by all to get to the crux of the matter.
- Great leaders have their eye on more than financial results.
- A healthy business is healthy in its culture and on the business's (financial) bottom line.
- With Aligned Momentum the bottom line is the result from all that you do to move toward your vision:
 - 1) Your bold and clearly communicated strategy
 - 2) Employees who are ready to adapt, shift and innovate
 - 3) Pivots orchestrated to stay aligned with strategy
 - 4) Well-chosen best next steps taken
 - 5) Priorities that align with strategy and are brilliantly executed
- Grow people and watch greater profitability follow.
- People drive results. The measurements related to people are the leading indicators to bottom-line performance results.
- Capture not just the financial results but also the indicators that lead to the results you seek. For example, more frequent performance conversations and employee empowerment may lead to higher employee engagement and Nimble Decision-making, which may lead to on-time delivery and higher quality, which could lead to attracting larger volume orders from a customer who has greater trust in you, which would then bring about the financial bottom-line result desired. From this state of mind, The Pivot comes more naturally.
- Profit, at best, is a lagging indicator of business performance; it is an outcome of your progress or lack of progress.

- The leader who creates a safe place for ideas, a culture of Aligned Momentum, and does not expect innovations to be perfect will reap the benefits of more engaged employees and a successful company by every measure. One way to create this safe place is to share your own innovations or decisions that may not have worked out so well.
- Leaders who don't cover up their errors, and instead learn and share their learning, reveal themselves as human—they become people whom others can admire and identify with.
- To move forward as a company, innovation must be continual and it must become part of the culture.
- Value more than the financial bottom line to reap performance and momentum benefits. Success is about so much more than the financial bottom line
- People are critical to business success. Create a safe place where each employee knows that their success is important, particularly to their manager. Safety doesn't mean complacency.
- Adapt talent to stay nimble. With every change in strategy, assess the people—the talent—in place to execute that strategy. Then train, promote and adjust in order to maintain alignment between each role and strategy and between each person's brand and the role they fill.
- One of the most effective methods to identify the readiness of employees (your business's talent) for the future is talent assessment.
- Pivot from traditional performance management to performance momentum. Over time, seek Clarity about the future of the individual, regardless of what role they are in right now.
- Performance conversations are best started even before you hire an individual to fill a role.
- People change roles, but what is expected from a role should also change, based on what best serves the strategy. Once job descriptions are created, it's too easy to institutionalize them in the name of efficiency, freezing them in time, and hire new employees based on the needs stated in an outdated job description.
- Revisit job descriptions for all roles affected by a change in strategy.
- Successful companies challenge their own status quo. At minimum, that means priorities for each quarter should be revisited and then communicated clearly before that quarter starts. Successful, growing companies revisit their strategy and plans at least once per quarter.
- Leaders are always orchestrating a Pivot. If your vision is not clear, if you aren't seeing how you might innovate in your market or how you might become irrelevant if you don't innovate, take a look at a few models. The companies you look at do not have to be in your specific industry. Start with an aspect of your business that is most obvious to you.

Part 3. Take Action

Chapter 9. Aligned Momentum Pivots

- In this chapter, the author recommends Pivots to move your organization's culture toward Aligned Momentum.
- It is the nimble business that stays in business—and grows.
- To get nimble enough to “jump the S-Curve” and avoid a stall, you need to ready your business internally.
- Take a Pivot/Aligned Momentum Assessment. You'll find a code in the Appendix that will give you online access to the assessment. (Another reason to buy the book).
- Find sample findings, Pivot recommendations, and a few best next steps in the subsections of Chapter 9 per each of the six Aligned Momentum Key Indicators: Clarity, Mastery Mindset, Nimble Decision-making, Strategic Thinking, Talent Adaptability, and Coaching.
- On average, and considering the readiness rating from 0–10 (10 is fully ready) for each Aligned Momentum Key Indicator, the areas for improvement listed by company size are as follows

Pivot to Clarity by company size

- a. Large (1000 + employees):
 - Too often a lack of progress toward strategic objectives can be traced back to a lack of Clarity. When people are clear not only about what is expected of them but also about what's in it for them, you've hit the jackpot.
 - As you master Clarity, also Pivot managers from managing work to building on the strengths of their employees and empowering them to deliver great work.
 - Another Pivot is from an "us" vs. "them" dynamic between units, divisions, departments or teams, to a "we" mindset that reaches all areas of the organization.
- b. Medium (101 to 1000 employees):
 - Each employee must be very clear about what is expected, who cares, and what's in it for them. Pivot from only annual reviews that aren't effective and often deferred (then deferred again), to more frequent performance conversations.
- c. Small (up to 100 employees):
 - For employees to be clear about how they can best align with strategy, Pivot from individuals doing their work in isolation, to a team aimed at continuous improvement or even the next breakthrough.
- d. Startup (0- 2 years from start):

To get current, relevant information to each employee, Pivot from each person operating on the basis of what they feel is the shared strategy, to a daily huddle that brings new facts to light. Pivot to Clarity from individual executives aimed at different priorities, to a leadership team with a shared commitment to strategy and quarterly priorities.

Pivot to Mastery Mindset by company size

- For some of us, a Mastery Mindset begins in childhood when an environment supports learning, choosing, trying, and making mistakes.
- It is while in a Mastery Mindset that breakthroughs can occur.
 - a. A Mastery Mindset Pivot for large businesses
 - Pivot **from** fixed mindsets **to** Mastery Mindsets, throughout the organization.
 - b. Two Mastery Mindset Pivots for medium-sized businesses
 - Pivot **from** no attention to mindsets, **to** tapping the power of employees with a Mastery Mindset to mentor others and innovate.
 - Pivot **from** promotion only with positional advancement, **to** career paths that reward achievement and advancement equally.
 - Nimble leaders grow themselves, not just their businesses.
 - c. A Mastery Mindset Pivot for small businesses
 - Pivot **from** a focus only on talent **to** also nurturing and rewarding desired behavior.
 - d. Two Mastery Mindset Pivots for startups
 - Pivot **from** relying on how it was done where I worked before **to** "what will work best here?"
 - Pivot **from** unrealistic stretch goals, **to** performance systems that support people with more opportunities to feel they are winners, and reinforce winning with celebration.

Pivots to more Nimble Decision-making, by company size

- Decisions and judgment calls are nimble when you are clear about strategy, have gathered the minimum necessary information, consulted people with expertise to offer, and coordinated with those who can influence or who will be impacted by that decision or call.
 - a. A Nimble Decision-making Pivot for large businesses
 - Pivot **from** meetings that reinforce silos in thought or function **to** meetings that bring more heads and more diverse minds together collaboratively to expand both awareness and decision-making support.
 - b. A Nimble Decision-making Pivot for medium-sized businesses
 - Pivot **from** decision-quality information only at the top, **to** leaders throughout the organization being empowered to initiate change and to understand how the data they are responsible for fits into brilliant execution of strategy.
 - c. A Nimble Decision-making Pivot for small businesses
 - Pivot **from** the presumption that the judgment calls made by every employee during their day only need to be addressed if something goes wrong, **to** empowering your employees with the strategic focus to make better calls.
 - d. A Nimble Decision-making Pivot for startups
 - Pivot **from** doing everything in the immediate, including how you make decisions, **to** a more disciplined approach that includes slowing down for better decision-making.

Pivots to effective Strategic Thinking, by company size

- a. Two Strategic Thinking Pivots for large businesses
 - Pivot **from** believing that strategic thinking is only done by senior executives, **to** committing to Strategic Thinking training for all employees.
 - Pivot **from** tapping every minute of managers' and experts' time with problems, **to** engaging managers and experts in the train-the-trainer program.
- b. A Strategic Thinking Pivot for medium-sized businesses.
 - Pivot **from** too wide a communication gap between those in the know about strategy and those who execute it, **to** empowering all with Strategic Thinking and the knowledge that is needed to ensure brilliant execution of strategy.
- c. A Strategic Thinking Pivot for small businesses
 - Pivot **from** separating strategy and execution **to** consistently linking them together in every thought before every action.
- d. Two Strategic Thinking Pivots for startups
 - Pivot **from** a mindset of turn-on-a-dime pivots, **to** a mindset of Aligned Momentum—including Strategic Thinking and The Pivot.
 - Pivot **from** inattention to culture, **to** intentionally creating and nurturing the culture that has the qualities you desire, and that you want to work in.

Pivots to Talent Adaptability, by company size

- a. A Talent Adaptability Pivot for large businesses
 - Pivot **from** business unit or departmental silos, where managers protect their turf, **to** collaboration between managers. Managers embrace other managers as peers on the same team.
- b. A Talent Adaptability Pivot for medium-sized businesses

- Pivot **from** inflexible ways such as authority based on power and control, protection of turf, competing for talent, and experience always trumping possibility, **to** a more nimble, adaptable culture.
- c. A Talent Adaptability Pivot for small businesses
 - Pivot **from** overfilling days with work that may not be advancing your company, **to** a culture that regularly revisits strategy and the work to be done.
- d. A Talent Adaptability Pivot for startups
 - Pivot **from** a hiring process that only seeks the strongest talent and assumes they will adapt, **to** the culture you envision and include Talent Adaptability—fitting your strategy—before hiring even the most talented person.

Pivots to Coaching, by company size

- a. A Coaching Pivot for large businesses
 - Pivot **from** managers who are managing work and responsible solely for managing the outputs of their team, **to** managers who coach people to their best performance.
- b. A Coaching Pivot for medium-sized businesses
 - Pivot **from** no time or budget for Coaching, **to** a training-sized budget for peer group Coaching to get you started.
- c. A Coaching Pivot for small businesses
 - Pivot **from** employees in j-o-b-s, **to** Coaching to expand skill and to align personal goals with company strategy.
- d. A Coaching Pivot for startups
 - Pivot **from** creating a culture unintentionally due to a lack of time to focus on that, **to** bringing in a performance coach to help you bring your envisioned culture to life.

Chapter 10. Your Best Next Step

- To brilliantly execute your business strategy, and transform via The Pivot, there will be many people who must work together toward a shared vision. You, the leader, are critical to ensuring a shared vision. And, you are accountable for that brilliant execution, even though you are not 100% in control of the results.

What You Do Next Is Important, Even Pivotal!

- Are you taking the time to smartly choose what to do next? Have you empowered employees to do the same? Are you maintaining alignment and momentum?
- 1) Weave “What’s next?” into meetings - Pivot from meetings that are ineffective because they lead to no action or improvement, to meetings that are effective...
- 2) Consider “What’s next?” before a judgment call - Pivot from making judgment calls only based on what seemed to work before, to better judgment calls...
- 3) Ask “What’s next?” and “Who is next?” to improve momentum in hand-offs - Pivot from processes having different owners based on team or function, to single accountability for each process...
- You and your business are unique. No one can prescribe the perfect solution to your situation without spending time with you and learning about your business. What is shared is that Aligned Momentum will serve all leaders and their businesses, including you and yours.

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About the reviewer: Frumi Rachel Barr, MBA, PhD

Dr. Frumi Rachel Barr is truly an entrepreneur having started and run 5 entrepreneurial adventures prior to following her passion for guiding the success of CEOs and their teams to gain traction and momentum to Scale Up.

Money and a plan don't guarantee execution

Execution depends on communication, cascading priorities throughout the organization and an external guide that holds the team accountable and keeps the momentum going. Lots of companies know **what** to do – it's the **doing** that needs an external guide. That's what we provide. We use the best systems on the planet, Gazelles and the Rockefeller Habits, as well as software to track team initiatives and progress.

Dr. Frumi's "**Why**" is to create a safe place for leaders and teams to discuss what matters most. She is known as The CEO's Secret Weapon. **Her Who**: Dr. Frumi guides leaders of rapidly growing companies and their teams who have a thirst for both discipline and learning. These creative, ambitious leaders want to grow their businesses so they have more freedom and a fabulous culture. Together we focus on People, Strategy, Execution and Cash, using practical tools to create greater revenue and profitability, with greater collaboration and accountability.

Dr. Frumi is the author of a *CEO's Secret Weapon: How to Accelerate Success*. The book was ranked top business book of 2012 by ExecRank and has a forward by her colleague Simon Sinek, international author of best-selling *Start with Why*.