# Themes of Confusion

"Oh man, they really don't get it."

The Balanced Scorecard champion's face looked pained as he reviewed the "candidate" strategic themes written on the flip charts around the training room: *Partner with Microsoft*, *World Class Excellence*, *Improve Cycle Time*, *20% growth by the end of next year*, *to be a Preeminent IT Powerhouse*, *IT Support Service Line*, *Improve Financial Viability*, and *Improve Customer Satisfaction*.

The champion was sure he could facilitate his own team but to be safe had hired the Institute to send me over to observe and advise him along the way. He was currently training the entire team on the *Nine Steps to Success*^{TM} Balanced Scorecard strategic planning and management system and was struggling to explain the basic concept of a strategic theme to a group of people that were not familiar with strategy terminology. I had been in another meeting and had just walked in to find him in an outright panic.

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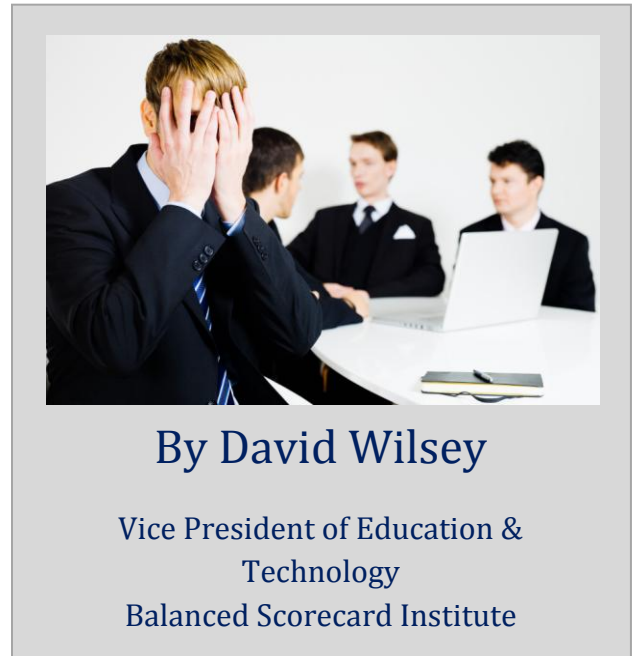
"So if they don't get it, then what? Do I just tell them the right answer?" he asked.

"No, that's not the solution," I replied. I then turned to one of the employees standing near the *Partner with Microsoft* candidate theme and asked, "What does the term *strategic theme* mean?"

"Our champion said that themes were our *key focus areas*," the employee said, "the *pillars of excellence*. He also said that another good analogy was that they are *the thrusters which an organization wants to deploy to achieve altitude*. To me, focusing on a partnership with Microsoft would do that."

"Does that look like the examples he showed you?" I asked.

"I don't know. He went through those awfully fast," she said.

"I see the problem," I told the champion, "those are good metaphors, but it sounds like you really didn't teach them what the term means at all."

Champions and consultants have to be good teachers.

The *Gorilla* Theme

My four-year-old daughter is currently on a *Tarzan* kick - meaning she has gotten in the habit of watching the Disney animated version of the story on a regular basis, which in turn means that the music from the film, mostly a collection of Phil Collins songs, is constantly running through all of our heads. One day I was in the car with my daughter and I was humming one of the melodies and I asked her, "is that (melody) the *gorilla* theme or the *person* theme?" She thought about it for a moment and, realizing that they always seem to play that melody during the parts of the story in which gorillas are on the screen, she said, "that is the gorilla theme."

I am not sharing this because I think my daughter is a musical prodigy that has a natural genius for understanding difficult abstractions like "musical theme." My point is that if I had tried to explain to her that a "musical theme" is "a melody or set of musical phrases that composers repeat and build upon in order to give a piece of music coherence and structure" and that "composers of music for opera, musicals, television, movies and other visual art forms use themes to set a particular tone for a character or concept," she would have had no idea what I was talking about. She certainly couldn't take that definition and apply it by identifying one correctly. But with one simple application example, I managed to demonstrate to a four-year-old a fairly abstract concept that many adults struggle with. She might not be able to define the term *theme*, but she seems to get the concept.

Balanced scorecard champions and consultants **have to be good teachers** if they want their audience to understand what it means to implement a strategic planning and management system effectively. The concept of *strategic theme* can be difficult for some to grasp and so if you, in the role of teacher, always explain the definition and application in abstract technical terms or metaphors as the champion above did, you could end up with a team that gets the concept only in the abstract and will hit a wall when it comes time to applying it.

Another important point here is that a good teacher will always clarify and build on the student's current understanding of a term. A student that is new to this terminology wants you to clarify what the difference is between a theme, an objective, an initiative and a target. Telling them that a theme is a *focus area* does no good in this sense, as you could describe any of the above as a focus area, not to mention many other similar concepts. Business lines, organizational units, core competencies, goals, and many other business or strategy concepts could all be thought of as focus areas. The same goes for the metaphor "pillar of excellence", as that still does not help a student understand the terminology, as many of the other terms could be thought of as pillars. It is a nice metaphor to demonstrate the vertical nature of themes relative to the horizontal manner in which perspectives are normally displayed, but if ask your students to then go and create themes based only on that metaphor, they will come back with a variety of answers similar to the examples above.

Building on the student's current understanding means thinking about the terminology in another light

Calling a theme a *focus area* doesn't clarify what the difference is between *themes*, *objectives*, *initiatives* and others.

that they currently understand and then helping the students shift from that understanding to this new application of the term. Most students learn the word *theme* in other walks of life to mean a recurring element or pattern of some structured and significant nature, or a unifying idea within a work of art. The *love conquers all* theme of a romance novel is never stated literally, it emerges in the form of repeated occurrences and story lines that reinforce the same unspoken message. Mr. Collins very intentionally repeated the same angular melody every time a gorilla appeared in the *Tarzan* movie so that that repetition could elicit an automatic reaction in viewers. And this concept isn't limited to the world of the arts. If I have a long conversation with someone in which religion comes up repeatedly, I might make a comment that our conversation had a religious *theme*. Teaching strategic themes should begin from this generic understanding of the words.

> ## Students should *NOT* create themes by looking for patterns in all of the work they are currently doing.

In this vein, a strategic theme is a recurring pattern that appears throughout all of the elements of your strategy. A process improvement initiative, a cost measurement, a low price strategy, a new partnership with a supplier and a cycle time measurement could be all aligned together strategically under the same coherent strategic theme. We could call that theme *Operational Excellence*. Similarly, a new branding campaign, a market share measurement & target, a website redesign initiative, and a new market research project could all be part of a different, but just as coherent *Build the Business* strategic theme. The strategies for most organizations are made up of three or four themes of this nature.

It is also important to understand what themes are not. Themes are not single projects, like the *Partner with Microsoft* idea. Establishing a partnership is most likely a single initiative that only applies to a single business unit or even a small team, not a recurring element that will appear throughout the organization. Themes are not Objectives like the *Increase Customer Satisfaction* example, again because a theme must have a more multidimensional nature that implies an entire chain of Objectives from building certain organizational capacities to selecting which processes should be improved to the specific reasons those customers are happy. In the same way, themes are also not single measures or targets. The most common examples are, in fact, common because they are universally understood to imply more than a narrow focus. *Operational Excellence* has implications throughout the organization. Growth themes (of many possible names) will lead to recurring patterns from Human Resources (what types of people do we need to hire) to Finance (what types of dollars are we targeting).

This explanation should **not** lead your students to come away from this lesson with the idea that you should create themes by looking for patterns in all of the work that they are currently doing. That would be like a movie soundtrack composer writing and recording random music for a movie or a novelist generating random content and then trying to make sense of it all after the fact. It is always better to start at a high strategic altitude and then work down. This means that you should establish and articulate who you are as an organization and what you want to

accomplish first in terms of mission and vision. Then you should do an analysis of your customers' needs and your organization's strengths and weaknesses and other assessment exercises to determine what your organization's customer value proposition is. From there, the most appropriate and effective themes for your organization can be established and defined. Once the students understand the basic concept of theme, the metaphors the champion above used are great for guiding this strategic discussion. Which themes should we chose to move our organization to the next level of performance – i.e. are the *thrusters the organization must deploy to achieve altitude*?

Conclusion

The champion solved his problem. First, he clarified what the phrase *theme* meant by comparing this new use of the term to the way his group might use the term in their software development process, thereby building on current understanding. Then he helped clarify the term by demonstrating how their suggestions better matched the definitions of the terminology *initiative*, *objective* or others. Finally, the champion thoroughly demonstrated a series of application examples that properly fit the *theme* definition. After the employees understood what the term really meant, the champion found there was an almost immediate improvement in the candidate themes: *Operational Excellence*, *Strategic Partnering*, *Strategic Growth*, *Product Leadership*, etc. Beyond that basic improvement in candidate ideas, there was also a significant reduction in the level of anxiety in the room, as understanding breeds confidence. And most of all, instead of one champion trying to build an entire system on his own, there was now an entire room full of people that could all intelligently discuss which of the candidate themes would best move the organization forward towards strategic success.

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