



Implementing 4DX<sup>®</sup> at Scale:

# Best Practices for Powering Organizations to New Heights of Performance

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# In 25 years of coaching and refining *The 4 Disciplines of Execution*®, we've learned plenty about how to achieve a breakthrough result that requires collective behavior change at scale.

From our experience, the question to ask yourself is:

**How effective is our organization in clarifying our strategy and connecting it to the front line, where real execution occurs?**

Creating the momentum required to deliver breakthrough results at any organization is hard. Really hard. Harvard Business School professor of leadership development, Robert Kaplan, found that 90% of organizations fail to successfully execute their strategies.<sup>1</sup> The main reason? Those strategies require collective behavior change to deliver their intended outcomes.

As leaders, we understand that even the most brilliant vision, delivered with electrifying charisma, is destined to fail without diligent follow-through and consistent execution. This challenge is magnified at complex enterprises, where leaders can feel like launch specialists at mission control who are confronted with a million dials, buttons, and warning lights. But when it comes to execution of a new initiative—which requires you to think beyond the whirlwind of your daily responsibilities—there are really just two levers to pull:

**Authority.** We can do a lot with the stroke of a pen, but we know all too well that mandates and money can only do so much. To execute your most important goals—improving customer satisfaction, transforming a business model, or increasing market share, for instance—your teams must go beyond simple compliance to being truly committed.

**Breakthrough Behavior Change.** This requires winning and maintaining both the focus and the best efforts of your people across the entire organization. This is where most initiatives meet with disaster. Achieving strategic shifts often requires true collective behavior change, which can be incredibly difficult to enact and sustain.

This guide describes the principles that we've discovered over decades of implementing 4DX (*The 4 Disciplines of Execution* system) at thousands of enterprises. It explains how 4DX transforms large organizations from slow-to-turn ships plagued with sporadic performance to well-oiled machines operating on a system of consistent results—where Wildly Important Goals® are accomplished and exceeded.



# The 4DX Essentials: Leverage for Liftoff



*The 4 Disciplines of Execution*, the bestselling book on execution for over a decade, outlines four principles that provide the greatest chance of hitting your organizational goals.

**Focus on the Wildly Important:**

Clearly identify the most crucial goals and limit distractions by concentrating efforts on just those priorities. Remember, these new goals must be pursued in addition to the day-to-day strain of keeping the business running.

**Act on the Lead Measures:**

Bring a greater focus to the actions and behaviors that predict future success (lead measures) rather than measuring only the lagging indicators that reflect past performance. Track the effort that your teams believe will drive the right outcome. This enables focus and an assessment of progress, with room for refinement and course correction.

**Keep a Compelling Scoreboard:**

Use a visible and easy-to-understand display to track progress towards your collective goals, motivating the team to strive for improvement. People play differently when they are keeping score. Think of being a spectator at a game. Without a scoreboard, you'd feel much less excited and engaged about the outcome.

**Create a Cadence of Accountability:**

Establish a regular schedule for reviewing progress, discussing challenges, and holding individuals accountable for their contributions. When you take 20 minutes a week for each team member to say what they will do to help hit the goal, that can go a long way to improving accountability.

These principles have become standard practice for enacting change for front-line teams. Organizations that want to implement 4DX at scale require a solid implementation, best supported by software and a methodical approach to track dozens of teams, often in different regions or business units.

# The 4DX Implementation: Achieving Escape Velocity

Intuitively, we know The 4 Disciplines have merit. They're simple, but that doesn't mean they're easy to apply. In fact, they're counterintuitive for many leaders.

Applying these practices at scale is like launching a rocket into orbit. Once you leave the earth's atmosphere, the ride is fairly smooth. But getting off the ground and away from gravity's pull—truly changing your collective behaviors in the day-to-day swirl of business—requires focus and attention.

Our observation—after more than 4,500 4DX implementations—is that most strategic initiatives get stuck somewhere in mid-management. That's the big wall. Sometimes it's due to a lack of buy-in down the leadership chain. But even when company leaders find the vision compelling, often no one knows quite what to do next.

By definition, a strategic shift is a change from the normal forward rush of current operations. We call this everyday stress “the whirlwind.” Your teams are already in an epic battle to keep the business running. Unless there is a clear method to keep the strategic initiative alive, even teams with the best intentions will succumb to the whirlwind.



**It's tempting to blame people for these failures, but leaders need to own the systemic nature of the problem. We often quote W. Edwards Deming, a statistician and engineer who pioneered the Quality Movement:**

**“Anytime the majority of the people behave a certain way, the majority of the time, the problem is not the people. It's the system.”**

# Leaders of Leaders: Tracking Effort to the Front Line

Driving collective behavior change across all layers of leadership and frontline teams requires organizations to implement a well-designed, effective system. To achieve lift-off, we recommend that leaders dedicate their primary focus to this implementation effort, ensuring it becomes deeply embedded in the organization's operations.

The effort is well worth it. By leveraging 4DX at scale, the overwhelming failure rate for institutional behavior change flips—to an impressive success rate of more than 80%.

A typical 4DX implementation happens in four stages:

- 1. Defining the Breakthrough:** This requires a focused assessment driven by collaboration among the executive team. The end in mind here is to foster clarity, alignment, and engagement in the prioritization of the organization's Wildly Important Goals. This part of the process also includes sharing the goals with company leaders, addressing their concerns, and gathering ideas on how their teams can contribute.
- 2. Activating the Frontline Teams:** This is where executive teams narrow their focus, by creating clarity and commitment around a breakthrough result and rolling the 4 Disciplines down to the front line via clear communication and a time-tested implementation methodology. Once they know how to contribute to the breakthrough goal, they can create their own Wildly Important Goal, measure progress, and keep score.

- 3. Creating Transparency:** This includes making sure each team is tracking their own Wildly Important Goals, as well as lead and lag measures, on a scalable platform. Engagement will soar once each team feels they are playing a winnable game that truly matters to the organization's success.

- 4. Tracking the Pace of Execution:** After having established transparency, leaders will monitor each team's red, yellow, and green status for achieving the breakthrough result while scoring their 4DX engagement.



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Companies invest \$30 billion annually on strategy creation, yet at least 80% of those strategies fail. Achieving execution on goals that require collective behavior change is one of the most challenging—and rewarding—leadership responsibilities.

—Mark Josie



# Best Practices for 4DX Success

Let's drill down on what 4DX best practices look like at the operational level. Here's what we've learned helps organizations most:

- **Capture data on 4DX effort at every level.** This includes individual, team, and company data, providing visibility up and down the entire organization.
- **Track implementation progress.** Track each team's progress in joining the 4DX system. Do they have their lead measures? Are they tracking them? Are they playing winnable games? Do they have a cadence of accountability?
- **Make it visual.** Measure it in red, yellow, and green for maximum visibility.
- **Track against expected stages.** Teams may stumble at first. Remember, this is all new. Ensure your teams are where you need them to be with 4DX during each week and month of an implementation. For example: Do you know where you need to be with the implementation at week six? What about month six?
- **Roll it up into a score.** We call it XPS™, or Execution Performance Score, which measures the collective energy engagement and activity around the breakthrough result across the organization. Like a grade point average, this score will tell you if you are winning or losing.

- **Move the middle.** Chart the status of all teams and seek out those that are in the middle of the XPS bell curve. Drill down to the team level to identify the ones that may need leadership support to shore up their 4DX efforts, shifting the whole organization to “righter and tighter” in execution discipline.

With the right dashboards and follow-through, you will vastly increase your chances of achieving breakthrough results. We seek to move the collective XPS score above a 3.5, out of 4, like a grade point average. Those maintaining top scores will see their odds of success increase to over 80%.



# Common Applications for 4DX at Scale

There are a wide range of use cases where we've seen 4DX accomplish breakthrough results:

**A global oil company that received support in its efforts to transition to new energy sources.**



**A state department of transportation that needed to reduce traffic fatalities.**



**A pharmaceutical company that transformed a declining, stagnant product into one of its fastest-growing successes.**



In every one of these types of cases and thousands more, 4DX has proven itself to be a critical component of execution excellence.

Indeed, any strategy that requires collective behavior change can benefit from 4DX. If you're chasing a strategic goal—and you're not making headway on the high-impact KPI in your sights—4DX gives you a tool you likely didn't have before. It lets you put basic truths of human motivation to work in your favor, activating team performance and enabling a move to the next level.

The story of a large resort's efforts to improve customer satisfaction shows how it's done.

# Case Study: Gaylord's Opryland Achieves Its Five-Star Goals

Nashville's country-music themed Gaylord Opryland Resort & Convention Center is one of the world's largest hotels—essentially an indoor city, with 14 restaurants, its own police department, and even its own power plant. The resort exemplifies how a plan to achieve breakthrough results can be implemented across a complex organization to reach and exceed the company's ambitions.

When the firm's leadership wanted to make some changes using *The 4 Disciplines of Execution* system, they began by identifying their Wildly Important Goal (WIG®). The leaders considered tackling usual-suspect issues like occupancy rates and revenue flow-through—certainly high-value metrics in hospitality. But they realized that their WIG, the breakthrough result with the biggest impact for their business, would be improving guest satisfaction.

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—Chris McChesney, co-author of *The 4 Disciplines of Execution*





As they embarked on the project, just 42% of guests gave Gaylord's service a perfect five-star rating. So, the leadership team targeted 55% as their goal, hoping—with a healthy competitive mindset—to beat the resort's two sister properties, behind which they'd been lagging for some time. They then identified three sub-WIGs out of 20 possible measurable activities that could most effectively support the main goal. These were:

- **Problem resolution:** At such a large facility, something was always going wrong. Improving the resolution process was vital to a smoothly operating resort and more satisfied customers.
- **Arrival experience:** Most people decide whether they like a hotel based on their arrival experience. After a lackluster first impression, it's tough to make anyone change their mind.
- **Food and beverage quality:** No one gives a perfect score unless the food is great.

"This was not trivial work," recounts Chris McChesney, co-author of *The 4 Disciplines of Execution*. It sounds easy to identify three sub-WIGs, but McChesney says it took nine hours to whittle down the original 20 choices down to the ones they truly believed mattered most to guest satisfaction.

The organization's sub-WIGs were next shared with 75 operating teams. Each team then identified their own tactics, in addition to each team's daily responsibilities, that they believed would move the needle on one of the three sub-WIGs to ultimately raise overall guest satisfaction. For example, housekeeping chose improving room availability, the front desk team targeted faster check-in, and bell services decided on faster luggage delivery—all tactics aimed at improving the arrival experience. Weekly accountability meetings were set up to monitor progress and help keep teams on track.

**The results were transformative.** Nine months after implementing 4DX, guest satisfaction rose even higher than the original goal, to 61%—an almost 50% net improvement. This progress was made possible by empowering 75 disparate teams, which each made consistent, daily frontline improvements. For instance, luggage delivery time dropped from 106 minutes to 12 minutes.

McChesney says: "When highly engaged teams focus on a few key targets and are accountable to each other, they leverage their combined energy. That's when conceptual strategy translates into simplicity and transparency—the keys to successful execution."

# Reaching Escape Velocity

Changing an organization takes the focus of a rocket launch. This is your mission control. The goal is to get into orbit, where your new initiative becomes a collective habit, the ride is smooth, and the sense of accomplishment is high.

But even if you're able to achieve liftoff on your own, most organizations find it difficult to remain in orbit without the right support in place. Our Execution Design Sessions prevent ambiguity and bring focus to strategic intent. We help your organization identify the highest-leveraged Wildly Important Goal at the executive level and translate the pursuit of that WIG into a winnable game.

FranklinCovey provides business-execution solutions that will transform your business and change how you and your team work together on top priorities. Our world-class performance-improvement solutions—delivered Live-Online or Live In-Person—are designed to help you execute on your organization's key breakthrough results.

For additional information about how we can help your organization, email us at [info@franklincovey-benelux.com](mailto:info@franklincovey-benelux.com) or visit [franklincovey-benelux.com](http://franklincovey-benelux.com).

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