Work of the Executive Team

Is the executive team focused on the most important work?

Getting clear about the most important things for the team to focus on—and just as important where it shouldn't spend its valuable time—is critical to determine who should participate and how the team should conduct its business.
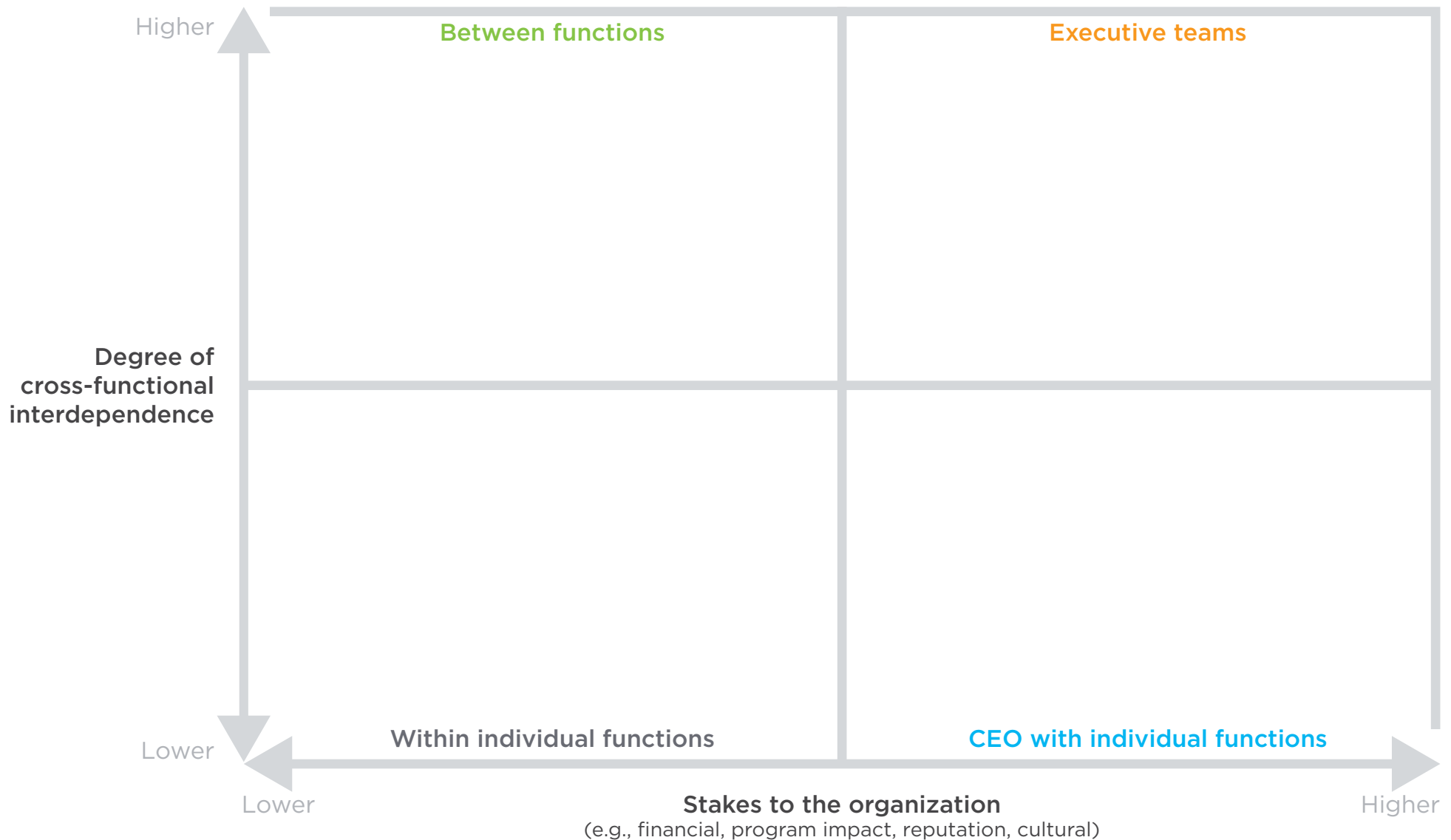
Resource Allocation
across all departments

Guiding
the organization toward achieving its top priorities

FOCUS ON:
Interdependent & High Stakes Issues

Cross-Department Decision Making

CEO Responsibilities
e.g., board management

AVOID

Departmental Decisions
e.g., programmatic operational decisions

Definitions

- **Interdependent Issues:** Those involving multiple units or functions where cross-leader discussion is critical for effective decision making.
- **High Stakes Issues:** Those having the most impact on the organization's strategic clarity and priorities, programmatic and organizational effectiveness, development of future leaders, external reputation, and financial sustainability.

Identifying the Work: Interdependence/Stakes Matrix

The Interdependence/Stakes Matrix helps executive teams determine their priority activities and decisions. The following tool and step-by-step instructions will help you apply it to your executive team's work.

Degree of cross-functional interdependence

Higher

Lower

Between functions	Executive teams
Within individual functions	CEO with individual functions

Lower

Higher

Stakes to the organization
(e.g., financial, program impact, reputation, cultural)

Interdependence/Stakes Matrix
Tool: Instructions

1 **Clarify your organizational priorities for the next 12-24 months**
- Summarize priorities, pulling from existing documents, such as strategic plans, and align as a team around these priorities.
- Identify other potential areas where the CEO wants team support, including processes to lead the organization, such as budgeting and resource allocation.

2 **Determine what priorities are the most interdependent**
- Identify priorities with the highest interdependence—those involving multiple units or functions where cross-leader discussion is critical for effective decision making.

3 **Determine what priorities have the highest stakes to the organization**
- Identify priorities with the highest stakes—those having the most impact on the organization's strategic clarity, programmatic and organizational effectiveness, development of future leaders, external reputation, and financial sustainability.
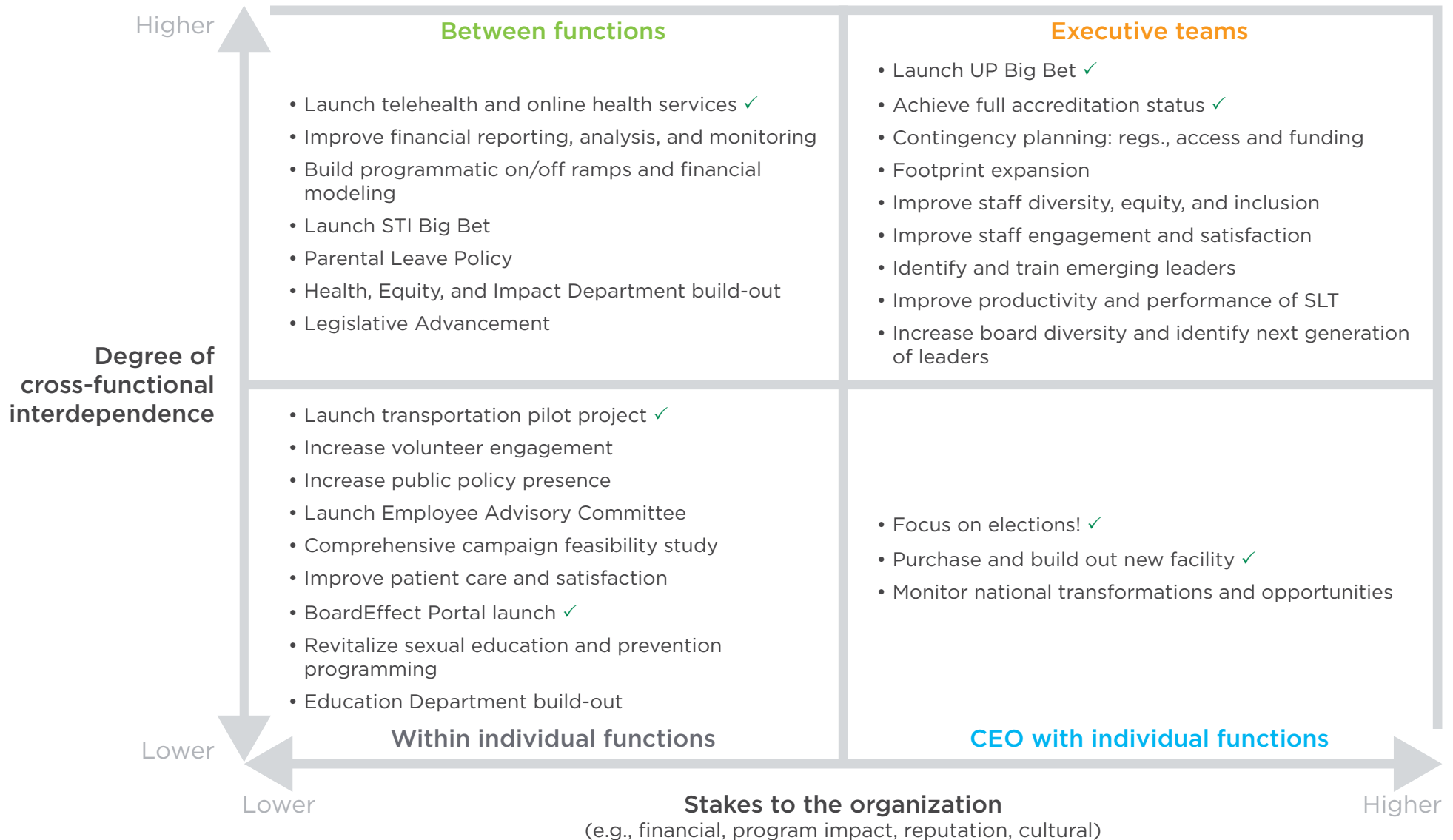
4 **Plot each priority on the Interdependence/Stakes Matrix**
- Identify those priorities that have both high interdependence and high stakes—those in the upper right-hand quadrant of the matrix; identifying priorities should be the collective work of the executive team.

5 **Determine the executive team's role for each area of work**
- Discuss the executive team's role (e.g., providing input, making a recommendation to the CEO, deciding); these are likely to differ by priority, so it is important to clarify what role the team is playing to optimize the team's time together.

Interdependence/Stakes Matrix: Client Example

Higher

Degree of
cross-functional
interdependence

Lower

Between functions

- Launch telehealth and online health services ✓
- Improve financial reporting, analysis, and monitoring
- Build programmatic on/off ramps and financial modeling
- Launch STI Big Bet
- Parental Leave Policy
- Health, Equity, and Impact Department build-out
- Legislative Advancement

Executive teams

- Launch UP Big Bet ✓
- Achieve full accreditation status ✓
- Contingency planning: regs., access and funding
- Footprint expansion
- Improve staff diversity, equity, and inclusion
- Improve staff engagement and satisfaction
- Identify and train emerging leaders
- Improve productivity and performance of SLT
- Increase board diversity and identify next generation of leaders

- Launch transportation pilot project ✓
- Increase volunteer engagement
- Increase public policy presence
- Launch Employee Advisory Committee
- Comprehensive campaign feasibility study
- Improve patient care and satisfaction
- BoardEffect Portal launch ✓
- Revitalize sexual education and prevention programming
- Education Department build-out

- Focus on elections! ✓
- Purchase and build out new facility ✓
- Monitor national transformations and opportunities

Within individual functions

CEO with individual functions

Lower

Stakes to the organization
(e.g., financial, program impact, reputation, cultural)

Higher

*This chart will be updated quarterly by SLT[1] at in-house Leading for Impact working sessions.

1 This healthcare organization refers to their executive team as their Senior Leadership Team (SLT).

✓ = competed items

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Work of the Executive Team:
Peer Perspectives

Without clarity around the work they must do, many executive teams fall into a cycle of unproductive meetings and feelings of dissatisfaction with the impact they're having on their organizations. One tool, the interdependence/stakes matrix, can help teams avoid these. (See page 7 for the Interdependence/Stakes Matrix tool.) Here several CEOs and a chief of staff describe how they've used the tool and how it's benefited the work of their executive teams. (See page 11 for an example of a completed matrix.)

How did you use the tool to identify the work of the executive team?

One CEO of a healthcare organization used the tool to measure a priority's relevance to the whole team. "The value of the tool is a five out of five," she reflected. "By placing priorities in each quadrant, we determined if it was something for all of us to talk about as a team or only some of us to talk about." Her chief of staff added, "We asked ourselves, 'Where do we have department crossover, versus where do we actually need the entire senior leadership team to work on this?' We learned the idea of shared responsibility—and if the full team does not have shared responsibility for an item, it does not belong in the top right quadrant," he said. "Deciding what is in each quadrant is something that has to be done with the entire group present. Having all of those voices in one place was so valuable."

Also critical is agreement on the number of priorities: the matrix is a visual way to quickly assess if you're taking on too little, or too much. "In getting to a manageably sized list of priorities owned by the executive team," noted Eric Robbins, CEO of the Jewish Federation of Greater Atlanta, "the team had to have the discipline to sit down and say, 'We can't accomplish everything, so what are the most important things for us to do? What are the priorities?' If you have too many priorities, they all lose something."

What have been the benefits of using the tool?

For the chief of staff of the healthcare organization, using the tool had multiple benefits. "This process helped us streamline our priorities, identifying if something fit squarely in a particular department, or if it was shared across departments," he said. "If it was shared, one of the biggest things that came out of this for us was getting more clarity on the amount of time required by us together as an executive team for that priority. This exercise gave us greater clarity, even on team members' individual roles. When it's a priority that is a shared space amongst the whole executive team, that's the most difficult—figuring out who's in the driver's seat. This process helped us answer, 'What is my responsibility within a given project or task?' Finally, something that has been a huge-value add for us is having universal language about our work as a team. This has been very useful for onboarding new hires, too. We have a guidepost."

Dorri McWhorter, CEO of YWCA Metropolitan Chicago, highlighted additional benefits. "The exercise gave us a structure and purpose for being together, which made us more effective. We also realized through this process that our work to refine our theory of change is something that the entire executive team should own. Before, we assigned that as a responsibility to one individual. In using the matrix tool, we realized that this should be a shared responsibility because everything else in our work flows from this."

How have you managed the work of the team on an ongoing basis?

"One of the challenges we had was that we would say, 'Oh, this could be four people's responsibility to achieve this particular priority.' But we realized that having multiple individuals responsible like that means that no one is truly accountable," McWhorter said. "We had to overcome this and get comfortable with assigning one point person who will really drive a priority forward for us and be the point person for how and when the ET should engage."

Besides accountability, it's also important to review whether the priorities you originally set are still relevant. "Instead of this being a standalone document that you do once, every year we revisit the priorities and make sure they are updated," Robbins of the Jewish Federation of Greater Atlanta said. "I also make sure that what I am accountable for to our board speaks directly to this list."

The chief of staff of the healthcare organization said his executive team pulls up to review its work quarterly. "We have quarterly half-day sessions, and one of the guaranteed agenda items at these meetings is looking at our matrix to say, what got completed? What can we put a check mark by and feel good about? Also, is there anything that needs to shift or change? At our next quarterly meeting, we're also going to flesh out the responsibilities of the individuals who have been named as primary and secondary leads on different executive team priorities."