



7-Step Adjust Protocol

1. Purpose and goals?

State the original purpose and any specific results that were promised. If the first step is difficult, you have your first lesson—you were never aligned regarding purpose.

2. Accurate results to-date?

State the accurate outcome to date. Separate facts and explanations. Only accept mutually agreed-upon facts. Treat facts under dispute like explanations.

3. Worked well?

Evaluate what worked well in achieving the purpose and promised results. What were valuable insights, methods, and mindsets? Sort the input into the Cycle of Value conversations:

Align (intersect, invent, and invest)

Act (engage, clarify, and close)

Adjust (review and renew)

4. Worked poorly?

Identify what worked poorly. Acknowledge unmet goals, disappointments, and mistakes of commission and omission. Sort the input into the Cycle of Value conversations:

Align (intersect, invent, and invest)

Act (engage, clarify, and close)

Adjust (review and renew)

5. Who to appreciate and for what?

Identify who is there to appreciate. Who specifically? What specifically did they provide? How and when will you recognize them?

6. Actionable lessons?

Consider which actionable lesson will produce value going forward. Look through the questions and answers above. Share the lessons with whomever would benefit. How will what we learned change the way we act? What new actions will we take immediately?

7. What will we do differently to improve?

Identify your most important focus for improvement. Name a single, important focus. What Cycle of Value conversation is it in? What structures and measures are needed to support adjustment?