



**Envision...Enlist ...Enact:  
How an 'Organizational Playbook'  
Helps Turn Vision into Results**

**by Linda Wilson**

**White Paper**

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# Table of Contents

<b>Envision</b>	<b>4</b>
<b>Enlist</b>	<b>5</b>
<b>Enact</b>	<b>6</b>
<b>Bottom Line</b>	<b>7</b>



Sports provide a number of appealing, universally understandable metaphors for business. Over the past 10 years, we have utilized a basic concept from the sports world to help clients crystallize their vision for the business and translate it into an understandable, tangible, engaging framework that can be communicated throughout the organization and 'projectized' for implementation.

Sports teams at virtually all levels have long used 'playbooks' to illustrate and communicate strategies to players. Consider a team in a soccer league. No coach would entertain the idea of showing up for new season without...

- (1) A roster of players who have a good mix of required physical skills, knowledge of the game and positions, and an understanding of the basic strategies and playing formations.
- (2) Scouting reports on the other teams and coaches in the league – a sports-based SWOT.
- (3) Strategies to compete successfully against each competitor, including roles for players in a variety of situations they are likely to encounter during the season.

This playbook becomes the operating bible for everyone connected with the team. It is the primary tool for describing the competitive situation and appropriate strategies at the team, group position and individual player levels. With this invaluable intelligence, coaches fine tune gameplans for each match that will increase the team's winning percentage which, in turn, will attract the interest of more highly skilled players for future recruitment, cause more heartburn among the coaches of other teams in the league, and maintain positive support from owners and fans.

## Envision

The sports playbook concept translates well to the business world. In the sports world, coaches must modify or completely change team strategies based on new players, rules or competitors. In the business world, the need for change may arise from new competition, new regulations, integrating new acquisitions, reengineering work processes, implementing new ERP systems, or even building a new culture. In an organizational context, a playbook is a visual framework detailing how the company will look and operate after implementing projects to transform the designated operational components required to achieve and sustain a new level of performance.

TBO has worked with clients to develop mega-scope playbooks that created new lines of business as well as mini-scope playbooks to transform divisions and functions within organizations. In all cases, a good deal of upfront work is required from leadership to validate and fully articulate the rationale for change and the new vision and strategy ... and then to determine the timing and resourcing of the portfolio of projects that will produce more wins for the company. This work is the basis for building unanimity among leaders and developing the contents of the playbook.

Like the soccer coaches, business leaders need a good set of strategies and a solid plan for team development to compete successfully and achieve goals. Similarly, the organizational playbook becomes the guide for envisioning the transformed business, inspiring the team and reaching new levels of performance – all in a systematic fashion. It is the primary communication tool for business leaders to translate high-level goals and strategies into a tangible vision of the future, with specific implementable actions across the organization that support the goals. As such, the playbook provides the basis for a common understanding and a common language for discussion of transformation activity.

While organizational playbooks can vary in length and design quality, they are sufficiently detailed to describe the transformation from multiple points of view as well as the projects undertaken to achieve the goals. In most cases they reflect the culture of the company. We've worked with multinational clients who produced slick magazine-quality 'Reference Guides' translated into multiple languages to ensure understanding and emphasize the value leaders placed in all their locations. Other clients choose less complex versions that are easier to produce in-house. Whether it's a 12-page brochure or a 40-page booklet, organizational playbooks should be...

- Aspirational – setting forth challenging, widely desirable goals
- Inspirational – motivating people to participate fully and achieve the goals
- Directional – providing relevant details and guidelines about how to achieve them in a systematic fashion

At the outset, organizational playbooks are typically organized into three main sections:

## **The Current Situation:**

**Where We Are Now.** This section provides the context for the areas of transformation/change, including key background data and the rationale for action.

## **The New Direction:**

**Where We Want to Be.** This section details for strategic drivers for change, including the vision of the transformed business as seen through the eyes of clients, collaborators, competitors and employees.

## **The New Direction:**

**How We Will Get There.** This section details the plan for implementing the vision and reaching desired goals, including strategic focus, organizational structure, roles and responsibilities, key business processes, supporting technologies, measures of performance and the initial priorities/transformation projects that leadership has chosen to undertake. This is the heart of the playbook, intended to guide decisions, actions and behaviors for leadership and team members alike.

Over the season, sports coaches continuously update their playbooks to reflect the team's performance using various playing strategies, plans to increase each player's skill level, and useful observations about their competitors. Similarly, the organizational playbook is updated to reflect unforeseen circumstances and/or take advantage of new business opportunities that arise. Having the playbook 'core structure' in place allows leadership to make and communicate any modification to direction quickly and effectively ... and in context.

## Bottom Line

For the soccer team, their playbook represents the way the team operates and the basis for executing each gameplan to conquer opponents. For managers and employees, the organizational playbook is the framework for aligning their actions and activities with company direction ... and for implementing initiatives that position the company for victory in the marketplace. A playbook keeps everyone's eyes on the ball ... and the goal.

*Note: Contact Gary Skarke ([gskarke@tbintl.com](mailto:gskarke@tbintl.com) or 713-821-1555) if you would like to learn more about how to create an organizational playbook. We'll even share our own "TBO Playbook for Strategic Growth" so you can see the power of a playbook to envision, enlist and enact transformation in your business.*

