

INNOVATING ADVISING WITH 4DX



LEARN MORE AT [ADVISING.BLOG](https://advising.blog)

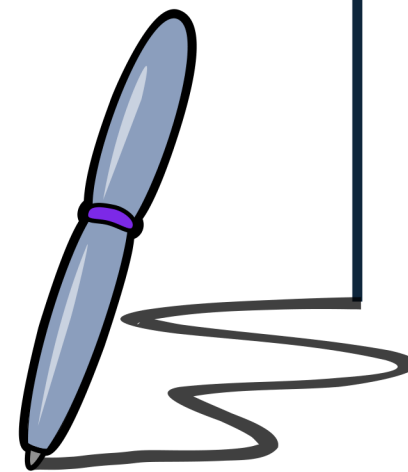
IDENTIFY THE STRATEGY NEEDED

STROKE OF THE PEN

HIRING ADDITIONAL STAFF
PROCEDURAL IMPROVEMENTS
SOFTWARE/HARDWARE UPGRADES

BEHAVIOR CHANGE

STUDENT SATISFACTION
ACCURACY OF ADVICE
CONSISTENCY ACROSS TEAM



(MCCHESENEY ET AL., 2012, P. 4)



4 DISCIPLINES OF EXECUTION

to change behavior



DISCIPLINE 1: FOCUS

FOCUS THE COLLECTIVE ENERGY OF THE TEAM TOWARD A SINGLE CHALLENGE.
FOCUS ON LESS TO ACHIEVE MORE.



DISCIPLINE 2: LEVERAGE

ACTING ON LEAD MEASURES TO
ACCOMPLISH THE LAG MEASURES.



DISCIPLINE 3: ENGAGEMENT

KEEP SCORE! KEEP VIEWING THE SCORE TO
ESTABLISH - ARE WE WINNING OR LOSING?



DISCIPLINE 4: ACCOUNTABILITY

REGULAR QUICK CHECK-INS. DID I
ACCOMPLISH LAST WEEK'S
COMMITMENTS? DID IT HELP? WHAT CAN I
DO IN THE NEXT WEEK TO MOVE THE
SCOREBOARD?

(MCCHESNEY ET AL., 2012, PP. 10-13)



ENERGY OF EXECUTION



WHIRLWIND

URGENT
DEMANDING
DAY-TO-DAY
ENEMY OF EXECUTION



GOALS

IMPORTANT
INNOVATIVE
FOCUSED ACTIVITIES
MUST BE PRIORITIZED

(MCCHESNEY ET AL., 2012, P. 24)

DISCIPLINE 1

WILDLY IMPORTANT GOAL

FOCUS

NARROW THE FOCUS TO THE MOST
IMPORTANT GOAL TO BE ACHIEVED

FROM **X** TO **Y** BY **WHEN**

Our WIG:

Move 60% of our
advisors from
traditional to blended
advising within two
years.

(MCCHESNEY ET AL., 2012, PP. 23-43)

DISCIPLINE 2

Our WIG:

Move 60% of our advisors from traditional to blended advising within two years.

ACT ON LEAD MEASURES

LEVERAGE

LEAD MEASURES

LAG MEASURES

LEAD MEASURES

THE DRIVING FORCE

1

ACTIVITIES MOST
CONNECTED TO
ACHIEVING THE GOAL

1

WEEKLY SESSIONS AND
LAB TIME WHERE ADVISORS
CREATE THEIR
EPORTFOLIOS (EP)

2

A JUST-IN-TIME PLAN
THAT CAN QUICKLY
ADAPT

2

ADVISORS COLLABORATE
AND PROVIDE FEED-
FORWARD ON PEERS'
PERSONALIZED CREATIONS.

(MCCHESNEY ET AL., 2012, PP. 44-64)

LAG MEASURES

ACHIEVING RESULTS

1

MONTHLY REVIEWS OF
TEAM EPORTFOLIOS (EP)

2

STUDENT FEEDBACK
SURVEYS REGARDING
EPORTFOLIO (EP)
CONTENT AND
HELPFULNESS

3

ADVISOR FEEDBACK
SURVEYS REGARDING
EPORTFOLIO (EP)
EFFECTIVENESS AT
ENRICHING STUDENT
INTERACTIONS

(MCCHESNEY ET AL., 2012, PP. 44-64)

DISCIPLINE 3

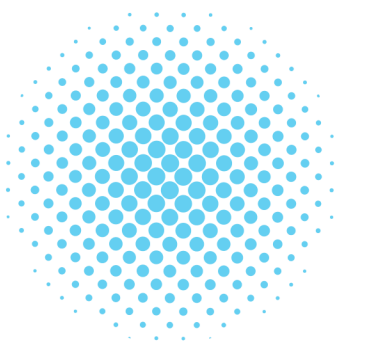
KEEP A COMPELLING SCOREBOARD

A COMPELLING
SCOREBOARD TELLS
THE TEAM WHERE
THEY ARE AND
WHERE THEY
SHOULD BE.

DISCIPLINE OF ENGAGEMENT

WITHOUT ENGAGEMENT, ENERGY
DISSIPATES, INTENSITY LAGS, AND
THE TEAM RETURNS TO BUSINESS
AS USUAL.

(MCCHESNEY ET AL., 2012, PP. 65-76)





ADVISING EPORTFOLIO PROJECT SCOREBOARD


Posted in the Advisor's lounge in used in weekly wig sessions

ADVISORS UTILIZING TRADITIONAL ADVISING

ASSESS AND MEASURE THE NUMBER OF ADVISORS ON THE TEAM UTILIZING TRADITIONAL ADVISING METHODS DURING ADVISING INTERACTIONS. THESE ADVISORS STILL NEED TO ADOPT THE EPORTFOLIO (EP) INITIATIVE.

ADVISORS UTILIZING EPORTFOLIOS FOR BLENDED ADVISING

ASSESS AND MEASURE THE NUMBER OF ADVISORS WHO HAVE INCORPORATED BLENDED ADVISING THROUGH THEIR EPORTFOLIO (EP) IN SOME CAPACITY FOR ADVISING INTERACTIONS.



COMPELLING SCOREBOARDS

SIMPLE

ONLY A FEW VITAL, RELEVANT PIECES OF INFORMATION ARE DISPLAYED.

VISIBLE

VISIBILITY DRIVES ACCOUNTABILITY.
RESULTS BECOME PERSONALLY
MEANINGFUL.

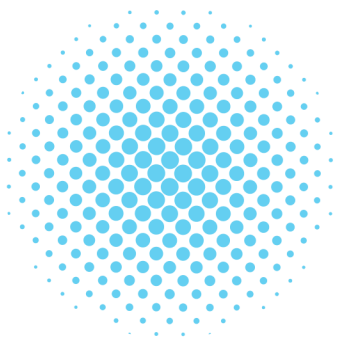
LEAD & LAG MEASURES

LEAD: WHAT THE TEAM CAN AFFECT.
LAG: THE DESIRED RESULTS.

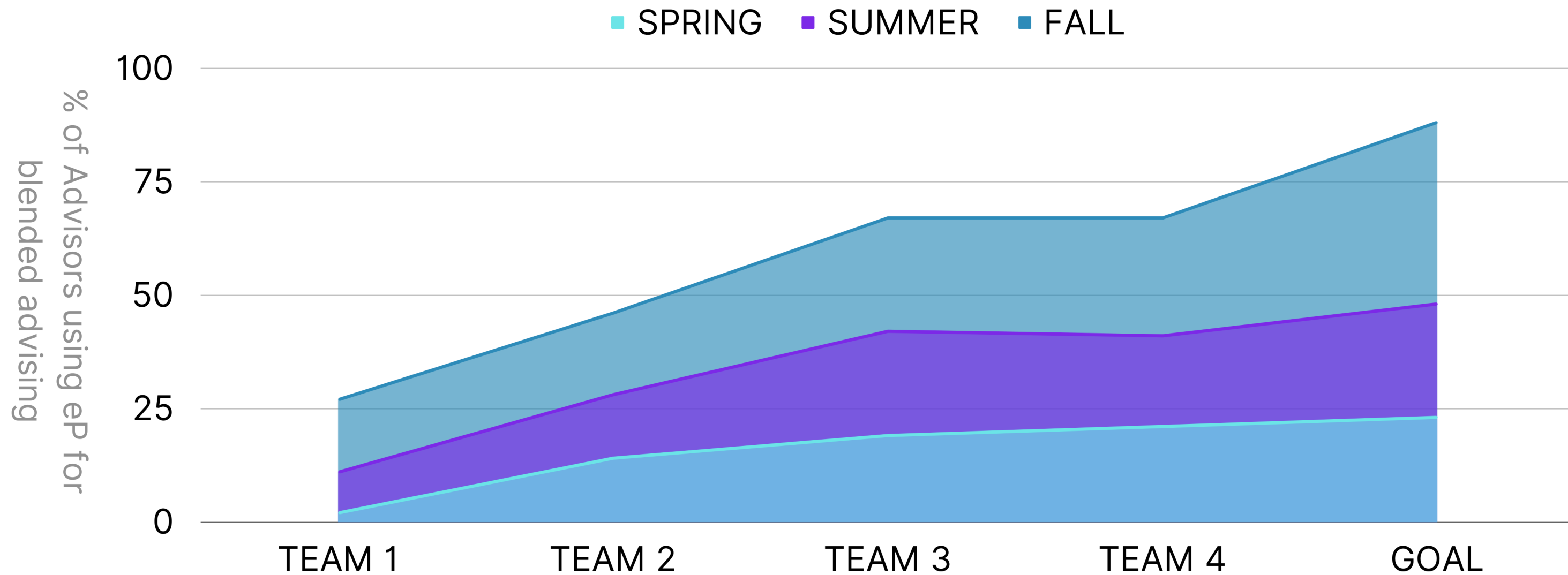
WINNING OR LOSING

FIVE-SECOND GLANCE: ARE WE WINNING
OR LOSING?

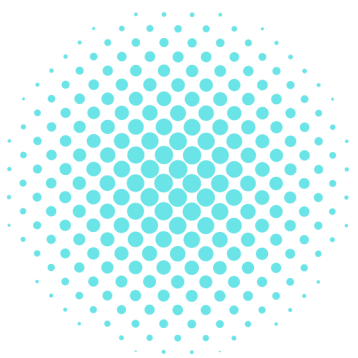
(MCCHESNEY ET AL., 2012, P. 70)



EPORTFOLIO SCOREBOARD



EXAMPLE SCOREBOARD FOR ADVISING INNOVATION PLAN



DISCIPLINE 4

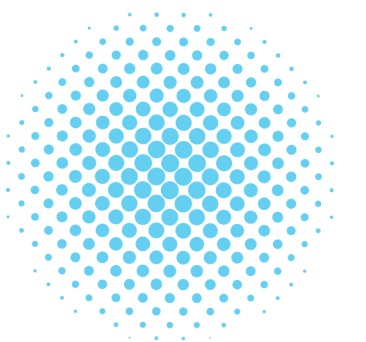
CREATE A CADENCE OF ACCOUNTABILITY

EVERY TEAM MEMBER IS RESPONSIBLE FOR ASKING HOW THEY CAN IMPACT THE LEAD MEASURES TO HELP MOVE THE SCOREBOARD.

DISCIPLINE OF ACCOUNTABILITY

WHERE EXECUTION TAKES PLACE, ACCOUNTABILITY CREATES THE CONDITIONS WHERE CRITICAL GOALS GET ACHIEVED AMID THE BUSINESS OF THE DAILY WORKLOAD (WHIRLWIND).

(MCCHESNEY ET AL., 2012, PP. 77-78),(MCCHESNEY ET AL., 2012, P. 84)





WEEKLY MEETING

SESSIONS MUST BE SHORT ENOUGH TIME TO REMAIN FOCUSED AND RELEVANT WHILE STILL GIVING ENOUGH TIME TO MAKE COMPLETE REPORTS ON COMMITMENTS.

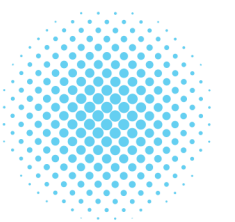


30 MINUTES OR LESS

FAST AND FOCUSED.

THE FREQUENT RECURRING CYCLE OF ACCOUNTING FOR PAST PERFORMANCE AND PLANNING TO MOVE THE SCORE FORWARD. DESPITE THE WHIRLWIND.

(MCCHESENEY ET AL., 2012, PP. 77-78)



ADVISING EP WIG SESSION

EACH ADVISOR AND LEADER WILL REPORT AND MAKE COMMITMENTS IN THE WEEKLY WIG SESSION.

ACCOUNT: REPORT ON COMMITMENTS
DID LAST WEEK'S COMMITMENTS GET MET?



UPDATES ON THE EPORTFOLIO (EP)
DEVELOPMENT AND USE ACCOMPLISHED
SINCE THE LAST WIG SESSION.

REVIEW THE SCOREBOARD: LEARN FROM
SUCCESSES AND FAILURES
*DID THOSE COMMITMENTS MOVE THE LEAD
MEASURES?*



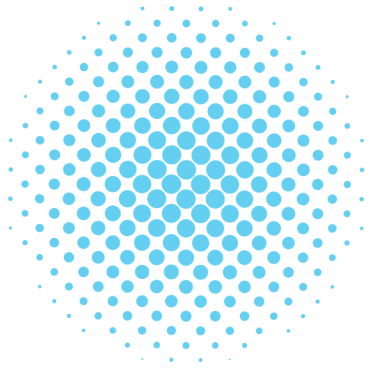
REVIEW ADVISING EP SCOREBOARD TO
ASSESS IMPACT TOWARD LEAD
MEASURES. EVALUATE WHAT WORKED
AND WHAT NEEDS TO BE IMPROVED.

PLAN: CLEAR THE PATH AND MAKE NEW
COMMITMENTS
*MAKE COMMITMENTS FOR THE UPCOMING
WEEK.*



ADVISORS COMMIT TO LEAD MEASURES
TO ACHIEVE BY NEXT WEEK'S WIG
SESSION.

FIVE STAGES OF BEHAVIOR CHANGE



STAGE 1: GETTING CLEAR

- COMMITMENT FROM THE TEAM TO CHANGE AND MAINTAIN WIG SESSIONS
- FAMILIARIZED WITH 4DX
- DEVELOPMENT OF A CLEAR WIG, LEAD & LAG MEASURES, AND SCOREBOARD

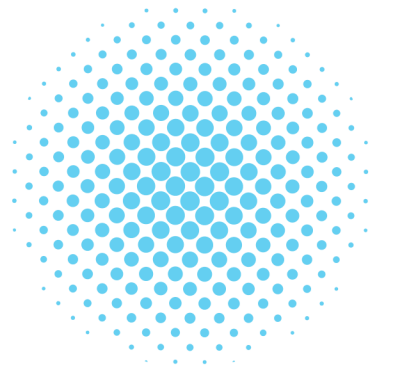


ADVISORS WILL GET CLEAR

- FOCUSING ON OUR WIG: MOVE 60% OF OUR ADVISORS FROM TRADITIONAL TO BLENDED ADVISING WITHIN TWO YEARS
- IDENTIFY OUR LEAD MEASURES: WEEKLY EPORTFOLIO (EP) SESSIONS AND PEER REVIEWS OF EP CREATION THROUGHOUT THE PROCESS
- CREATING OUR SCOREBOARD AND KEEPING IT VISIBLE TO ALL TEAM MEMBERS
- SCHEDULE AND KEEP WEEKLY WIG SESSIONS

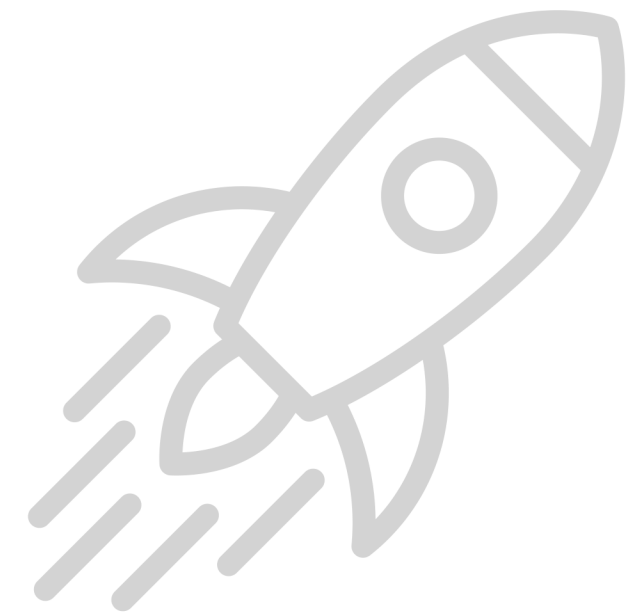
(MCCHESNEY ET AL., 2012, PP. 107-108)

FIVE STAGES OF BEHAVIOR CHANGE



STAGE 2: LAUNCH

- REQUIRES FOCUS AND ENERGY
- TRUST THE 4DX PROCESS
- IDENTIFY MODELS, POTENTIALS, AND RESISTERS

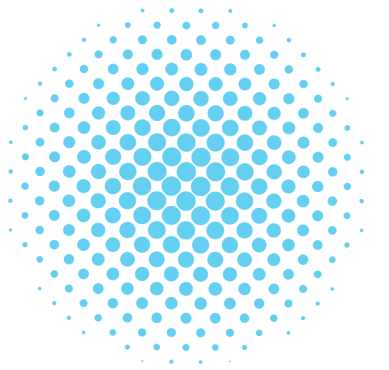


ADVISORS WILL LAUNCH

- ADVISORS MAY NEED ENCOURAGEMENT TO REMAIN FOCUSED ON THE WIG WHILE TRUSTING THE PLAN
- MODEL ADVISORS AND LEADERS CAN HELP INFLUENCE POTENTIALS AND RESISTERS BY ILLUSTRATING THE BENEFITS OF THE LEAD MEASURES TO THE INDIVIDUAL TEAM MEMBERS

(MCCHESENEY ET AL., 2012, PP. 108-109)

FIVE STAGES OF BEHAVIOR CHANGE



STAGE 3: ADOPTION

- ADOPT THE 4DX PROCESS
- TRAIN/COACH POTENTIALS
- COUNSEL RESISTERS
- ENTHUSIASM INCREASES WITH THE RESULTS

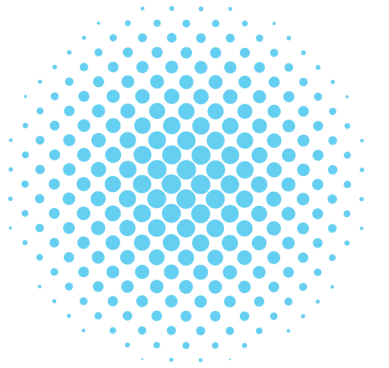


ADVISORS ADOPT 4DX

- ADVISORS SEE HOW THEIR CONTRIBUTIONS TO THE LEAD MEASURES ARE HELPING THEM WIN ON THE SCOREBOARD
- EXCITEMENT BUILDS AS ADVISORS HOLD EACH OTHER ACCOUNTABLE TO THE WIG AND THEIR WEEKLY COMMITMENTS
- ADVISORS MENTOR AND TRAIN EACH OTHER

(MCCHESNEY ET AL., 2012, P. 110)

FIVE STAGES OF BEHAVIOR CHANGE



STAGE 4: OPTIMIZATION

- FIND WAYS TO OPTIMIZE PERFORMANCE
- THE TEAM EMBRACES OWNERSHIP OF THEIR IDEAS
- ENCOURAGE/RECOGNIZE CREATIVE IDEAS
- CELEBRATE SUCCESSES

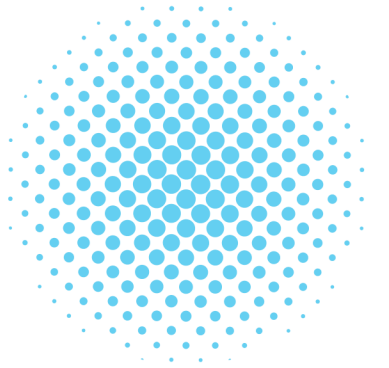


ADVISORS ACCEPT OWNERSHIP

- AS ADVISORS RECOGNIZE THE CHOICE, OWNERSHIP, AND VOICE THEY EXPERIENCE THROUGH THEIR AUTHENTIC ADVISING EPORTFOLIO (EP) DEVELOPMENT, THEY BECOME MORE ENGAGED AND OPTIMIZE THEIR PERFORMANCE
- LEADERSHIP MUST BE OBSERVANT TO CELEBRATE IMPROVEMENTS AND SUCCESSES.

(HARAPNUIK ET AL., 2018), (MCCHESNEY ET AL., 2012, PP. 111-112)

FIVE STAGES OF BEHAVIOR CHANGE



STAGE 5: HABIT

- A CULTURE OF EXCELLENCE FORMS
- CELEBRATE WIG ACCOMPLISHMENT
- MOVE TO A NEW WIG IMMEDIATELY
- TRACK AND MOVE THE MIDDLE TO CREATE HIGH PERFORMERS



ADVISORS HAVE EMBRACED EPORTFOLIOS

- ADVISORS ENTHUSIASTICALLY HOLD WIG MEETINGS AND KEEP EACH OTHER ACCOUNTABLE FOR THEIR EPORTFOLIO (EP) DEVELOPMENT, IMPROVEMENTS, AND UNIVERSAL BEST PRACTICES
- ADVISORS EXPERIENCE EXCITEMENT OVER THE TIME AVAILABLE FOR MORE PROFOUNDLY MEANINGFUL ADVISING SESSIONS SUPPLEMENTED BY THEIR EPORTFOLIO (EP)
- THE TEAM SETS NEW WIG TO IMPROVE FURTHER ADVISING FOR LEARNERS AND THEMSELVES.

(MCCHESNEY ET AL., 2012, PP. 112-113)

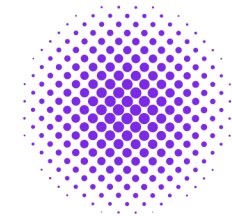
4DX WORKS EVERY TIME



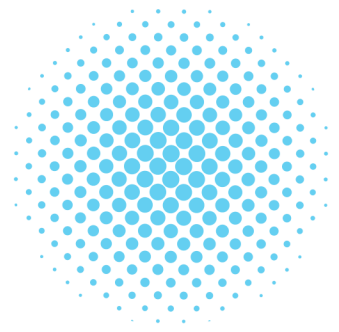
THE MOST CHALLENGING THING A LEADER WILL EVER HAVE TO DO IS DRIVE A STRATEGY THAT REQUIRES A CHANGE IN HUMAN BEHAVIOR.



4DX MOVES THE MIDDLE BY EXECUTING A BEHAVIORAL GOAL DESPITE THE WHIRLWIND.



(FRANKLINCOVEY, 2011)



REFERENCES

FRANKLINCOVEY. (2011, JULY 26). MOVE YOUR MIDDLE - CHRIS MCCHESNEY [VIDEO]. YOUTUBE. [HTTPS://WWW.YOUTUBE.COM/WATCH?V=J3THJ5B3VWW](https://www.youtube.com/watch?v=J3THJ5B3VWW)

HARAPNUIK, D., THIBODEAUX, T., & CUMMINGS, C. (2018). CHOICE, OWNERSHIP, AND VOICE THROUGH AUTHENTIC LEARNING. CREATIVE COMMON LICENSE.

HORN, M. B., & STAKER, H. (2017). BLENDED: USING DISRUPTIVE INNOVATION TO IMPROVE SCHOOLS. JOHN WILEY & SONS.

MCCHESNEY, C., COVEY, S., & HULING, J. (2012). THE 4 DISCIPLINES OF EXECUTION: ACHIEVING YOUR WILDLY IMPORTANT GOALS (1ST ED.). FREE PRESS.