

ORGANIZATIONAL INTELLIGENCE

The Executive Operating Rhythm

Executive Workbook · The field manual for a first cycle

Five phases. Five evidence gates. One weekly beat. This workbook is the working companion to the article: a page for each phase, the artifacts each one produces, the gate that lets you advance, and the calendar for a first ninety days.

1 ORIENT **2 LISTEN** **3 MAP** **4 TEST** **5 COMMIT**

Five phases. Five evidence gates. One weekly beat.

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How to use this workbook

Time is the budget. Evidence is the trigger.

The Executive Operating Rhythm is the recurring cadence you follow while applying Organizational Intelligence. It does not replace that discipline; it is how the discipline is run on an ordinary Tuesday.

Phases end when their evidence is sufficient, never because a date arrived. Work each phase page in order. Do not advance until you can answer the gate question honestly. The first ninety days in a role are your first complete cycle; after that the same five phases repeat at a slower tempo for as long as you hold the job.

Two things rise during a transition, at different speeds. Felt confidence climbs fast and dips when the business proves more complex than it looked. Earned confidence, meaning what the evidence actually supports, climbs slowly and steadily. The stretch between them is the “Exposure Gap”: the period when you could act and should not. Every gate below exists to close it before a decision is made.

THE WEEKLY BEAT

Inside every phase, one loop repeats. It takes about ninety minutes a week and it is the first thing to fail under pressure.

- | | |
|------------------|--|
| 1 COLLECT | Conversations, documents, direct observation. Raw input only. |
| 2 WRITE | Convert what you heard into a written pattern. The same day. |
| 3 SHARE | A short written update to your sponsor and team. Findings, not verdicts. |
| 4 SHARPEN | Revise the question ledger. Name what you now need to know. |

THE THREE-QUESTION TEST

At any moment you should be able to answer three questions immediately and in writing: What have I learned? What surprised me? What have I not yet verified? If those answers require preparation, the beat has stopped.

1 ORIENT

Phase 1 of the Executive Operating Rhythm

OBJECTIVE

Know what you were hired to do, what the organization believes about itself on paper, and precisely what you do not yet know.

EXECUTIVE MINDSET

Deliberately uninformed. Your value here is the quality of your questions, not the speed of your opinions.

ACTIVITIES

- Draft the mandate in one page and edit it with the person you report to
- Read board decks, plans, results, and prior strategy documents
- Agree the check-in cadence and set the readout date
- Build the conversation list and the sequence you will work it in

COMMON MISTAKES

- Treating the pre-start period as time off
- Accepting a verbal mandate because writing it down feels presumptuous
- Forming conclusions from documents rather than behavior
- Arriving without a readout date

DECISION GATE

The Mandate Gate

Can you state in one sentence what you were hired to do, and name the three things you most need to find out?

ADVANCE WHEN

- ☐ The Mandate Note has been edited by your sponsor and you both recognize it
- ☐ The readout date is on the calendar, including the board calendar
- ☐ Your Question Ledger is uncomfortably long and specific
- ☐ You can name what you expect to find, so you will notice when you are wrong

NOTES

2 LISTEN

Phase 2 of the Executive Operating Rhythm

OBJECTIVE

Collect first-hand testimony from enough of the organization, and from far enough down it, that patterns emerge rather than opinions.

EXECUTIVE MINDSET

Genuinely curious, visibly unhurried. You are being watched for whether you actually want the answer.

ACTIVITIES

- Structured conversations to a consistent question set
- Deliberate reach beyond your function and beyond your direct reports
- Direct observation: sit in the real meetings, watch the actual handoffs
- Name and credit what already works, early and publicly

COMMON MISTAKES

- Talking. You should speak for well under a third of each conversation
- Interviewing only the people your predecessor trusted
- Reacting visibly to the first sharp criticism
- Letting the writing slip

DECISION GATE

The Saturation Gate

Are new conversations still producing new information?

ADVANCE WHEN

- ☐ New voices confirm rather than add
- ☐ You can state what everyone agrees on, and where accounts split cleanly
- ☐ You have heard from people who were not on your original list
- ☐ Your questions have visibly narrowed

NOTES

3 MAP

Phase 3 of the Executive Operating Rhythm

OBJECTIVE

Produce a picture of how work, decisions and influence actually move, in a way that explains the results the business is producing.

EXECUTIVE MINDSET

Structural rather than personal. You are describing a system that produces outcomes, not grading the people inside it.

ACTIVITIES

- Trace two or three real decisions end to end, by name and date
- Map the handoffs where work waits, and measure the waiting
- Identify who is consulted informally regardless of title
- Separate what is genuinely broken from what is merely unfamiliar

COMMON MISTAKES

- Mapping the org chart again in a different color
- Cataloging only dysfunction
- Confusing unfamiliar with broken
- Reorganizing before the map has been tested

DECISION GATE

The Coherence Gate

Does your map explain the results the business is actually producing?

ADVANCE WHEN

- ☐ You can trace a real outcome through the map end to end
- ☐ You can name what to protect as specifically as what to change
- ☐ A ten-year veteran reads it and says you have it about right
- ☐ You have found at least one thing that surprised you

NOTES

4 TEST

Phase 4 of the Executive Operating Rhythm

OBJECTIVE

Convert a plausible picture into a verified one by testing the beliefs your plan would depend on.

EXECUTIVE MINDSET

Actively trying to be wrong. You are looking for the finding that would cost you most to discover after you commit.

ACTIVITIES

- Write down the beliefs your plan rests on, as falsifiable statements
- Check each against data, documents, or a second independent source
- Take the strongest version of the map to the person most likely to disagree
- Sit with the outcome: the actual customer, the actual deal, the actual number

COMMON MISTAKES

- Testing only the beliefs you already doubted
- Accepting agreement as verification
- Running the test as post-hoc justification
- Abandoning a sound map because one detail failed

DECISION GATE

The Evidence Gate

Can every move be traced to a named finding that would survive challenge?

ADVANCE WHEN

- ☐ Every proposed move has an Evidence File entry naming its source
- ☐ At least one belief you arrived with has been disproved
- ☐ You can state what remains uncertain, and why it does not block the first moves
- ☐ Your sharpest internal critic has seen the map

NOTES

5 COMMIT

Phase 5 of the Executive Operating Rhythm

OBJECTIVE

Turn verified understanding into a small set of decisions, stated publicly, with owners and dates the organization can hold you to.

EXECUTIVE MINDSET

Decisive and traceable. The confidence is real now because it was earned.

ACTIVITIES

- Deliver the readout: what you heard, what the evidence supports, what you will protect, and where you will act first
- Choose few moves rather than many, and sequence them
- Name owners, dates, and the measure that will show whether each worked
- Say plainly what you are deliberately not doing yet

COMMON MISTAKES

- Committing to everything you found
- Presenting findings without decisions
- Quietly dropping inconvenient findings
- Letting the readout slip

DECISION GATE

The Readout Gate

Has the organization heard your findings and first moves in your own words?

ADVANCE WHEN

- ☐ The readout has been delivered to sponsor and organization
- ☐ Every commitment has an owner, a date, and a measure
- ☐ The Watch List is written and shared, not held privately
- ☐ The next cycle's orientation is on the calendar

NOTES

The five gates

Phases end on evidence, never on dates.

If you take one page from this workbook into your first ninety days, take this one. The phases are what you do. The gates are what tell you when you have done enough.

THE MANDATE GATE

Orient → Listen

Can I state in one sentence what I was hired to do, and name what I most need to find out?

☐

THE SATURATION GATE

Listen → Map

Are new conversations still producing new information?

☐

THE COHERENCE GATE

Map → Test

Does my map explain the results the business is actually producing?

☐

THE EVIDENCE GATE

Test → Commit

Can every move be traced to a named finding that survives challenge?

☐

THE READOUT GATE

Commit → Orient

Has the organization heard my findings and first moves in my own words?

☐

The artifacts

What each phase leaves behind.

☐ Mark an artifact complete when it is strong enough to support the phase gate.

PHASE 1 · ORIENT

The Mandate Note ☐

One page: why the role exists, what it must fix, and what success means at twelve months.

The Question Ledger ☐

A running list of everything you do not yet know, dated and revisited every week.

PHASE 2 · LISTEN

The Listening Record ☐

One structured note per conversation, to a consistent question set, written the same day.

The Pattern Note ☐

A weekly page naming what is repeating across conversations, and what is contradicting.

The artifacts

Test and Commit.

PHASE 3 · MAP

The Operating Map



How work, decisions and influence actually move, traced through real decisions.

The Strength Register



What already works, why it works, and who is responsible for it.

PHASE 4 · TEST

The Assumption Log



One row for every belief: the test applied, the result, and the resulting confidence level.

The Evidence File



One page for every move under consideration, holding the evidence required before committing.

The artifacts

Test and Commit.

PHASE 5 · COMMIT

The First Moves Memo



The decisions, the evidence behind each, their owners, their dates, and the measure of success.

The Readout



What you heard, what the evidence supports, and where you will act first.

The Watch List



What remains uncertain, and what would change your mind.

The first cycle

One way ninety days can run.

Durations are estimates. Gates are the actual triggers. Use this to plan your calendar and to give your sponsor something concrete, not to decide you are finished.

PERIOD	PHASE	WHAT EXISTS BY THE END
Offer to Day 1	Orient	Mandate Note; Question Ledger; readout date fixed
Week 1	Orient closes, Listen opens	First Listening Records; conversation sequence
Weeks 2–4	Listen	Weekly Pattern Note; first named strengths
Days 30–55	Map	The Operating Map; the Strength Register
Days 55–80	Test	The Assumption Log; an Evidence File per move
Days 80–90	Commit	First Moves Memo; the Readout; the Watch List

READING THIS CORRECTLY

Listen occupies about a third of the cycle and Commit about a ninth. If your own plan inverts that ratio, you are not running the rhythm. You are running a launch with a listening tour attached to the front.

Board summary

One page for the people who granted the ninety days.

WHAT I WAS ASKED TO DO

WHAT I HEARD

WHAT THE EVIDENCE SUPPORTS

WHAT I WILL PROTECT

WHERE I WILL ACT FIRST

WHAT I AM STILL WATCHING

CONTINUE THE SERIES

Organizational Intelligence The cornerstone
The Executive Listening Tour Phase 2
Beyond the Org Chart Phase 3
Evidence-Based Alignment Phase 4
From Findings to Action Phase 5
What Great CEOs Expect The Ninety-Day Compact