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ORGANIZATIONAL INTELLIGENCE · THE OPERATING PHASE

From Findings to Action

*An executive workbook for turning what you learned
into a first plan that holds.*

The organization has been understood, the patterns tested, the leadership team read. This workbook is the conversion: findings separated from actions, a portfolio with four positions, three gates for every first move, and the arc of the first ninety days.

ERIK R. MILLER

E.R.M. Advisory · Organizational Intelligence Series

erikrmiller.com

Findings are not actions.

Work only from what the earlier phases produced. Nothing here asks anything new of the organization.

Write your findings on one page and your candidate actions on another, and hold them apart long enough to ask two questions: which tested finding is behind each action, and where does every other finding go if not into action? Then give the plan its shape: not a task list, a portfolio with four positions.

1 · PROTECT

What already works. Named publicly. Left alone.

Decided first, announced first. Protection releases the organization's bracing, credits the people who built what works, and costs less than anything else in the plan.

2 · ACT

A few first moves: confirmed, reversible, visible.

Three or four at most, chosen where the evidence is strongest rather than where the annoyance is loudest. Each traces to a finding, can be undone at reasonable cost, and will be noticed when it lands.

3 · BUILD

One or two foundational commitments. Longer than a quarter.

Drawn from the deepest confirmed patterns. Build work starts in the first ninety days, is communicated honestly as long-term work, and moves at the pace of deliberation.

4 · WATCH

Open observation: an owner, a reason, a review date.

Real but unconfirmed findings, and right-but-not-yet changes. Said out loud in the readout, reviewed on schedule. Waiting with a review date is a decision; waiting without one is delay.

THE ONE RULE

Every action traces to a tested finding, and no finding vanishes silently. The people who surfaced them are watching for them.

Run every candidate move through the gates.

Confirmed, reversible, ready: in that order. Failures route to Build or Watch, never nowhere.

1 THE FINDING _____
THE CANDIDATE ACTION _____

☐ CONFIRMED ☐ REVERSIBLE ☐ READY POSITION _____

2 THE FINDING _____
THE CANDIDATE ACTION _____

☐ CONFIRMED ☐ REVERSIBLE ☐ READY POSITION _____

3 THE FINDING _____
THE CANDIDATE ACTION _____

☐ CONFIRMED ☐ REVERSIBLE ☐ READY POSITION _____

4 THE FINDING _____
THE CANDIDATE ACTION _____

☐ CONFIRMED ☐ REVERSIBLE ☐ READY POSITION _____

A move that passes all three gates earns the Act position. Confirmed but irreversible: Build. Unconfirmed, or no capacity this quarter: Watch, with a review date.

Every tested finding lands in exactly one position.

What you leave alone is decided as carefully as what you change.

PROTECT

What stays, and who built it

ACT

Confirmed · reversible · visible

BUILD

One or two. Longer than a quarter

WATCH

Owner · reason · review date

What the quarter taught, and what happens next.

One page for the board, the CEO, or the readout itself.

THE HEADLINE *what this quarter of listening taught us, in one sentence*

WE WILL PROTECT *what works, and who built it*

WE WILL ACT *first moves, each traced to its finding*

WE ARE BUILDING *the one or two foundational commitments*

WE ARE WATCHING *open items, owners, review dates*

THE ASK *what we need from this room*

Structure the conversation in the portfolio's order: heard, shown, protected, acting, watching. Evidence before recommendations.

Three moves of thirty days.

Show the portfolio. Deliver the first proof. Set the rhythm.

DAYS 1-30

Show the Portfolio

- ▢ Deliver the readout: heard, shown, protected, acting, watching.
- ▢ Credit the people behind what works.
- ▢ Start the first reversible move.

DAYS 31-60

Deliver the First Proof

- ▢ Land the first visible moves and say what changed.
- ▢ Credit the sources of each finding.
- ▢ Begin the build work quietly.
- ▢ Reverse what is not working, early.

DAYS 61-90

Set the Rhythm

- ▢ Close the loop on every Act move.
- ▢ Put Build on its long-term footing.
- ▢ Hold the first Watch review, openly.
- ▢ End the transition on purpose.

Momentum is finished work, not activity: three moves that land, one commitment that deepens, and a protected core that never wobbled. By day ninety, ordinary leadership has begun.

CONTINUE THE LEARNING PATH

- › The series cornerstone: Organizational Intelligence
- › Phase 1 · The Executive Listening Tour (with interview guide)
- › Phase 2 · Beyond the Org Chart (with analysis canvas)
- › Phase 3 · Evidence-Based Alignment (with executive workbook)
- › Phase 4 · From Findings to Action (this article)