ALICE AND CHESTER THE CAT

Discuss a Secret about Achieving Objectives

Abstract

Chester "Cat" Cattrell uses examples and diagrams to show Alice a secret about achieving an objective; namely, how to identify the path that leads from actions to the achievement of the objective. Cat calls this "The Achievement Path." Along the way, Cat introduces Alice to several new concepts and ideas, including Target Variable, Target Value, Accessible Variables, Connecting Variables, Driver Variables and, of course, the Achievement Path.

Author's Note

This story started out as a series of papers written in a more or less academic style. I was encouraged to rewrite the ideas in story form, perhaps in the form of a little book. This is the result.

At one point in Lewis Carroll's *Alice in Wonderland*, Alice says to the Cheshire Cat, "Would you tell me please, which way I ought to go from here?"

"That depends a good deal on where you want to get to," said the Cat.

The Cheshire Cat had it exactly right. The path you follow depends very much on where you want to get to. When it comes to achieving your objectives, the path the effects of your actions should follow depends very much on the objective you are trying to achieve.

That's what this short story is about – *The Achievement Path* – the route by which the effects of your actions culminate in achieving (or not achieving) your objective.

And what better teacher could we have than the Cat? So, let's continue the conversation between Alice and the Cat. Only this Alice isn't in Wonderland, she's a manager in a large organization and the Cat is an internal consultant named Chester T. Cattrell, called "Cat" by his colleagues.

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Chester T. "Cat" Cattrell looked up from his desk and saw Alice McFarland standing in the doorway to his office.

"How can I help you Ms. McFarland?" asked Chester.

"I've just been assigned a new objective by my director," said Alice, "and I could use some help figuring out how to go about achieving it. I'm told you have some interesting thoughts about how best to achieve an objective," she added.

"Well, I do have some thoughts," acknowledged Chester, "but I'm not sure as to the best way to get them across to you. I could give you some papers I've written, I could talk you through an example or two, or I could let you ask me questions and do my best to answer them. Why don't you have a seat and we'll try to figure out the best way to proceed."

Alice took a seat across the desk from Chester and said, "Thank you, Mr. Cattrell."

"Call me Cat," said Chester, "everyone else does."

"Okay, Cat, and you can call me Alice," replied Alice. "How do we get started?"

"I think the best place to begin," said Chester, "is with you telling me what you already know about objectives."

"Well," said Alice, "I know they specify a goal, some result to be achieved. I know they should be specific, measurable, and time-tied." She added, "And they should be realistic, something that can in fact be achieved and not just some impossible dream."

"Sounds to me," said Chester, "like you've heard of SMART objectives – specific, measurable, actionable, realistic and time-tied."

Alice laughed and said, "Management 101."

Chester chuckled and said, "There is a problem with that acronym. It tells you how objectives should be *stated* but it doesn't tell you anything about where to get them or how to achieve them."

Alice nodded.

"Tell me something," said Chester, "think about the most recent objective you achieved and tell me how you did that."

Alice furrowed her brow, thought for a moment, and then said, "I was tasked with reducing the costs of my department by 10 percent. I met with my staff, we discussed our options, we looked at the cost savings offered by each, and we picked those we could live with and that added up to the 10 percent."

"Sounds like a reasonable approach," said Chester. "It also sounds like it didn't present any difficulty."

"No, it didn't," agreed Alice, "aside from the pain of the cost cuts. We knew what to do and we did it. But that's not the case with the objective my boss just assigned me. It's not clear what we need to do to achieve it."

"Hopefully," Chester remarked, "I can help with that." Then, he looked at his watch and asked, "How are you fixed for time?"

Alice glanced at the wall clock behind Chester, and said, "I've got a meeting in half an hour, Cat, and I need to finish getting ready for it."

"No problem," said Chester. "When can you come back?" he asked.

"Tomorrow morning at nine."

Chester glanced at his calendar, and said, "That works for me. See you then."

Chester stood and Alice rose and left his office.

Chester sat down, took out a note pad and wrote down two words: "Achievement Path."

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Promptly at nine the next morning, Alice was back in Chester's office.

Chester began, "I've been thinking about our conversation yesterday and I'd like to touch on a couple of key points."

"Okay," said Alice.

"First," continued Chester, "we are talking about an objective where how to achieve it isn't clear. Second, we are talking about how to *achieve* objectives, not how to write them or where to get them. Does that fit with what you recollect?"

"Yes, it does," replied Alice.

"Okay," said Chester, "so let's begin with a simple little example that will illustrate some key points we'll dig into in more detail later on."

"Sounds good," said Alice.

Chester then related the following story: "This past weekend my wife and I were sitting in the living room when she said she was feeling a little chilly. So, I got up, went over to the thermostat and turned it up a couple of degrees. The furnace kicked in, warm air began to enter the room, the room temperature rose by a

couple of degrees. After a while, I asked my wife how she was feeing and she said fine. So let me ask you, Alice, what was *my* objective in the little story I just told you?”

Alice thought for a moment and then said, “To turn on the furnace.”

Chester nodded and said, “That’s one. But why would I want to achieve that objective?”

“To make your wife feel warmer,” replied Alice.

“Correct,” said Chester. “How did I achieve that objective?”

“You turned up the thermostat, the furnace came on, warm air came into the room and the room temperature went up,” answered Alice.

“Correct again,” said Chester. “What specific action did I take?”

Alice thought again and said, “You turned up the thermostat.”

“And then what happened?” asked Chester.

Alice frowned at having to repeat herself and said, “The furnace came on, warm air came into the room, the room temperature went up, and your wife felt warmer.”

“Good Now let’s extract some key points from this little example,” said Chester.

“To achieve an objective, any objective,” he continued, “you have to do something, you have to take action, you have to change something. At the heart of any objective is some variable. In this case, the variable was my wife’s sense of warmth. An objective also specifies some desired or required value for the variable. In this case, my wife wanted to feel warmer. The variable at the heart of an objective is known as the ‘Target Variable’ and its intended value is known as the ‘Target Value.’ Does that make sense?”

“I never thought about it that way before,” answered Alice, “but I understand what you’re saying. What I don’t see is why that’s important.”

“It’s important,” replied Chester, “because the Target Variable and its accompanying Target Value form one end of a very important path. The other end

of that path connects to actions taken. Between these two ends of the path lie other variables and values that affect the achievement of the objective. Let's look at a diagram I use to illustrate my wife's example so we can see what I'm talking about."

Chester removed a sheet of paper from a file folder on his desk and placed it in front of Alice. It contained the diagram shown below.
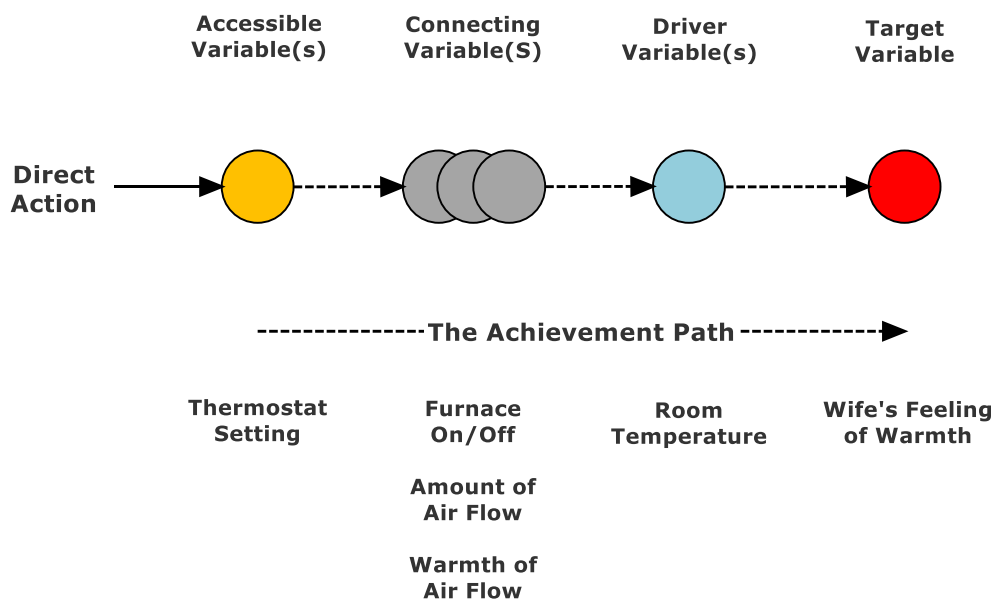
"Go ahead," said Chester, "take a minute or two to look it over and then let's discuss it."

Alice studied the diagram for a few moments then sat back and said, "I think I get it, Cat."

"Great," said Chester. "Tell me what it is you're getting."

"Well, to begin with," began Alice, "I see how the elements of the story fit into the diagram. You turned up the thermostat, the furnace came on, the amount and warmth of the air entering the room increased, the room temperature went up, and your wife felt warmer."

"Agreed," said Chester. "What else?"

"The 'Accessible Variable' is something you can directly affect."

"Right," said Chester. "What else?"

"Well, the Driver Variable seems to be something that directly affects the Target Variable."

"Right again," said Chester. "What else?"

"The Connecting Variables do what their name implies, they connect the Accessible Variable to the Driver Variable."

"And?" asked Chester, with raised eyebrows.

"Well, the 'Achievement Path,' as you call it, runs from the Accessible Variables through the Connecting Variables to the Driver Variables. Those in turn connect to or drive the Target Variable."

"Very good," said Chester. "That basic framework – the Achievement Path as it were – is something that applies to any and all objectives. There is a path that runs from the actions you take and their direct, immediate effects, through some set of other variables, eventually leading to a change – and hopefully the desired change – in the value of the Target Variable. When that is the case, the objective has been achieved."

"Why haven't I heard about this before?" asked Alice.

"Because much of time, just as was the case with your cost reduction objective, we don't have to think through or identify the path. A lot of the time we know what to do, or at least we think we do, and we simply do it. We have an intuitive grasp of the situation and the path to our objective, and our actions generally have the desired effects. But," Chester added, "in cases where we're not sure what to do, we do have to think through how we're going to achieve the objective and that is when thinking about and identifying the Achievement Path is a smart thing to do."

"Okay," said Alice, nodding, "how do I do that?"

Chester glanced at his watch and said, "Now it's me who has somewhere else to be. When can you come back?"

Alice looked at the calendar on her iPad and said, "Just about any time tomorrow afternoon."

Chester looked at his calendar and said, "How about 2 o'clock?"

"Fine," replied Alice. She stood and left Chester's office.

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Alice entered Chester's office promptly at 2 o'clock the next afternoon and said, "I would really like to see a more complicated example of an Achievement Path, preferably one from the workplace."

"Sure," replied Chester. "Have a seat and we'll get right to it."

Opening a file folder on his desk, Chester took out a sheet of paper containing the diagram below and laid it on the desk in front of Alice.
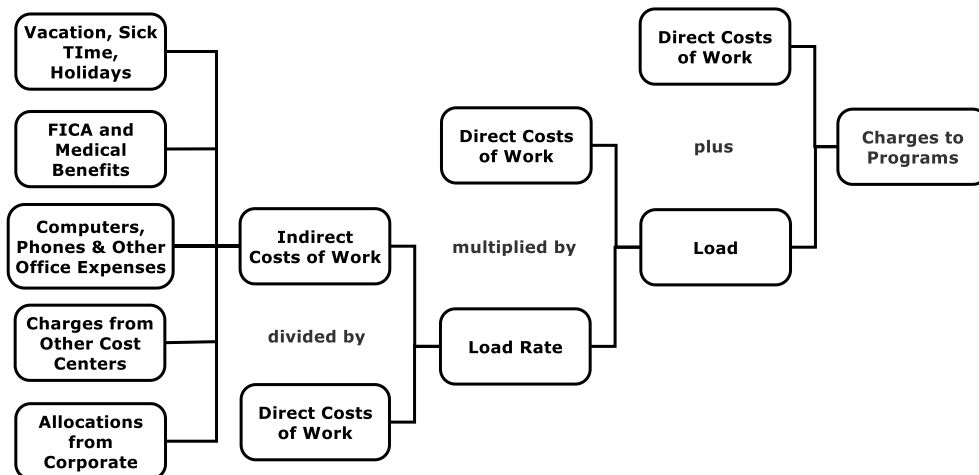
"This example," he began, "was given me by an old friend and colleague at another company, a fellow by the name of Peter Taylor. At the time, he was a newly appointed division director at a large non-profit. His division supported several of the organization's programs. It, along with several other units, was moved into new and much more expensive space. Soon afterward, the directors of the programs his division supported began badgering him to do something about the 'Load Rate'. Peter had no idea what they were talking about and so he started looking into the matter. What he discovered was that 'Load Rate' referred to a variable in the calculation of the charges to the programs that was in addition to the direct labor costs. It was involved in calculating a kind of overhead. To help him better understand Load Rate, Peter prepared the diagram I just showed you."

Chester, referring to the diagram, said, "As you can see, Load Rate is calculated by dividing the Indirect Costs of Work by the Direct Costs of Work. The Direct Costs of Work are then multiplied by the Load Rate to determine the Load. Load is added to the Direct Costs of Work and the sum of the two yields the Charges to the Programs."
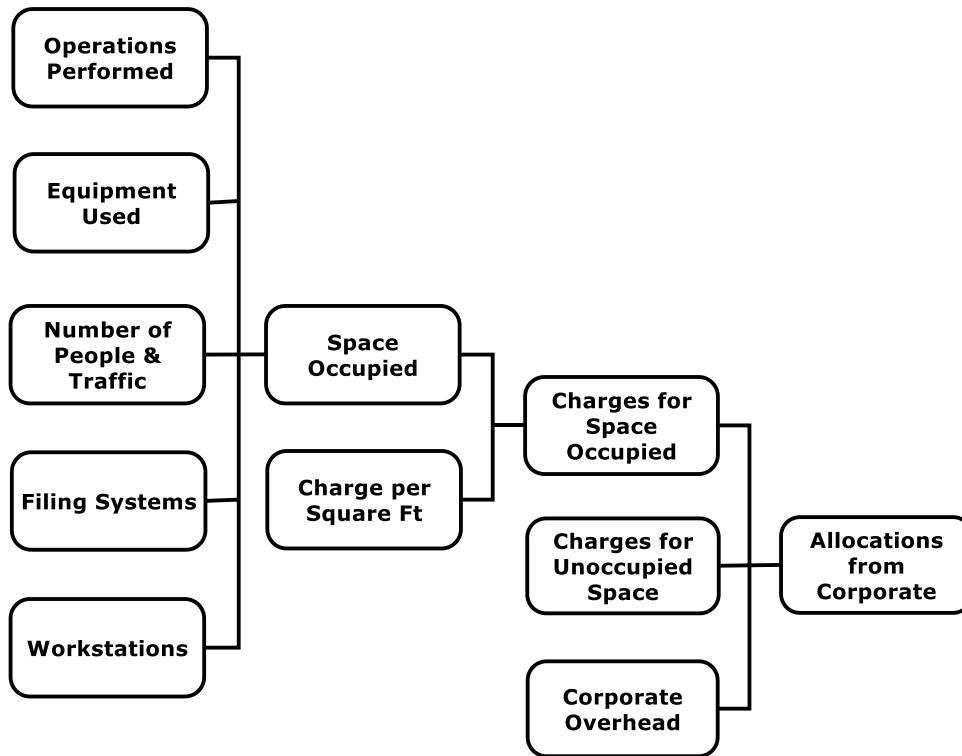
"Wow," exclaimed Alice, "that seems awfully complicated."

"Yes," agreed Chester, "but Peter told me that the finance folks in his company explained to him how the use of Load Rate enabled them to calculate charges to the programs on a monthly basis, but they only had to update the actual data every quarter, at which point they would update and reconcile the charges, too. Naturally, they didn't go into detail about how all that worked."

"Those finance people rarely do," remarked Alice.

"Anyway," said Chester, "the program directors watched the Load Rate figure like hawks. After the move to more expensive space, the Load Rate for Peter's division went up as did his division's charges to the programs. So, the next question for Peter was what drove Load Rate. As you can see, there are several variables contributing to Indirect Costs of Work and he took a look at those. According to his division's financial person, the only one of those that was up significantly was Allocations from Corporate. When he looked at the structure of that variable, what he found is shown in this diagram."

Chester took another sheet of paper out of the file folder and laid it on his desk in front of Alice.

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┌──────────────┐
│  Operations  │
│  Performed   │
└──────────────┘

┌──────────────┐
│  Equipment   │
│    Used      │
└──────────────┘

┌──────────────┐       ┌──────────────┐
│  Number of   │       │    Space     │
│  People &    │───────│   Occupied   │       ┌──────────────┐
│   Traffic    │       └──────────────┘       │ Charges for  │
└──────────────┘                              │    Space     │
                                              │   Occupied   │
┌──────────────┐       ┌──────────────┐       └──────────────┘
│              │       │  Charge per  │                              ┌──────────────┐
│Filing Systems│       │  Square Ft   │       ┌──────────────┐       │ Allocations  │
└──────────────┘       └──────────────┘       │ Charges for  │       │    from      │
                                              │ Unoccupied   │───────│  Corporate   │
┌──────────────┐                              │    Space     │       └──────────────┘
│              │                              └──────────────┘
│ Workstations │
└──────────────┘                              ┌──────────────┐
                                              │  Corporate   │
                                              │  Overhead    │
                                              └──────────────┘
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"What Peter found was that the Charges for Space occupied were up a lot – and for two reasons. First, the move was to more expensive space, so the Charge per Square Foot was up. Second, as part of the move, his division had been assigned a new program to support and his division had also been assigned more space to house it." Chester concluded, "More expensive space and more of it were the factors driving up the Load Rate for Peter's division."

Alice shook her head from side to side, and said, "What did he do?"

Chester chuckled and said, "Well, he knew he couldn't do anything about the cost of the space, so he decided to look into the way space was being utilized. In the building they had moved from, his division occupied 17,000 square feet. In the
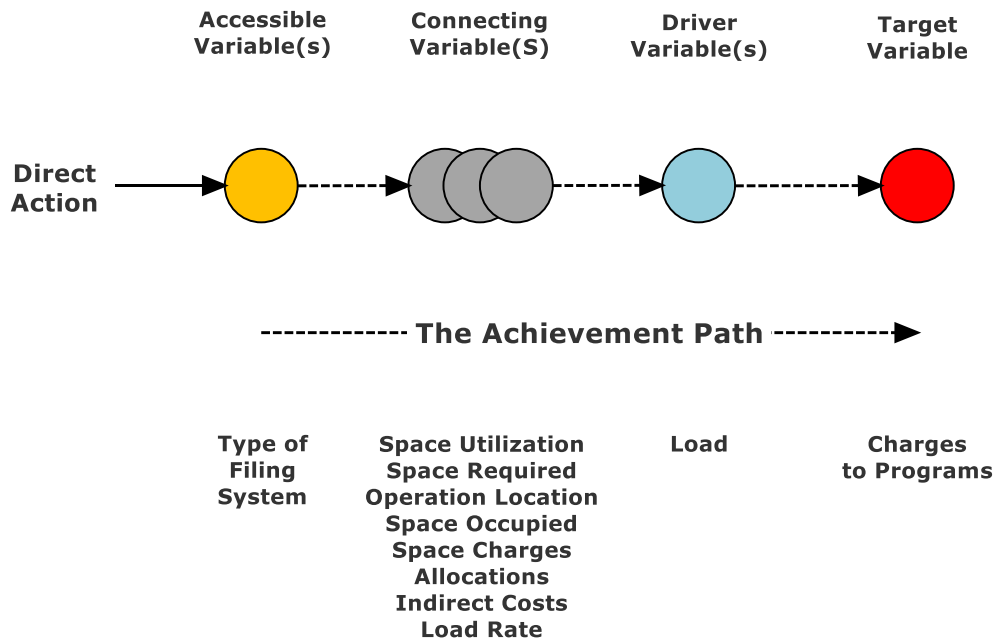
new location, it occupied 20,000 square feet in one building and another 5,000 in a second building where the new program was housed. He knew he had 3,000 square feet available in his main building so he wanted to see if there was a way of collapsing the space in the other building, move it into the main building, and turn the extra 5,000 square feet back to corporate.”

“How did he fare?” asked Alice.

“Pretty good, actually,” answered Chester. “Most of the space in the additional building was taken up by tub files, literally washtubs on legs. Shifting from tub files to a vertical filing system allowed him to fit the new program into the available space in the main building. The extra 5,000 square feet was turned back to corporate and the Load Rate for Peter’s division was reduced accordingly.”

“Good for Peter,” said Alice. “So what does the Achievement Path look like for this one?”

“Glad you asked,” said Chester, putting a sheet of paper containing the diagram below in front of Alice

Accessible Variable(s)	Connecting Variable(S)	Driver Variable(s)	Target Variable

Direct Action → 🟡 ----▶ ⚪⚪⚪ ----▶ 🔵 ----▶ 🔴

------------ **The Achievement Path** ---------▶

Type of Filing System	Space Utilization Space Required Operation Location Space Occupied Space Charges Allocations Indirect Costs Load Rate	Load	Charges to Programs

Chester started explaining the diagram. "Peter's direct actions, aside from investigating the matter, consisted mainly of changing the type of filing system being used. That in turn led to an improvement in space utilization that took the form of reduced space requirements, which enabled relocating the program in question. That led to a reduction in space occupied, space charges, allocations from corporate, indirect costs and load rate. Those all added up to a reduction in load and in turn a reduction in charges to the programs."

Alice frowned and said, "But, basically, he had no direct control over any of those connecting variables or the driver variable."

"True," agreed Chester, "but the effects of the change to the type of filing system used rippled through the structure of the system where charges to programs were calculated and did in fact make themselves felt as a reduction in charges to the programs. According to Peter, the program directors were quite happy."

"What about things like costs and ROI?" asked Alice.

"Well, what Peter told me," replied Chester, "was that the one-time cost of the vertical filing system was around $15,000 and the annual reduction in charges to the programs was $250,000."

Alice nodded and said, "I can see why the program directors were happy." She paused and added, "I can also see the role the Achievement Path played in Peter's situation. It wasn't so much a matter of having to map it out so he could follow it but to map it out so he could find something related to program charges that he might be able to change."

"Spot on!" exclaimed Chester. "Basically, he worked his way backward through the structure of the cost accounting and program charging systems. The Target Variable for him was Charges to Programs. Load Rate got his attention but, as he learned, it was a connecting variable that affected Load. As he mapped out the structure of those systems, he realized that finding some way to reduce space occupied was his only avenue of hope. And, sure enough, he found one."

"So, how do you identify the Achievement Path for an objective?" asked Alice.

"We can certainly discuss that," answered Chester, "but we're running out of time for today's session. When can you come back?"

Checking her calendar, Alice replied, "Nine o'clock tomorrow morning."

"Fine," replied Chester. "See you then."

Alice rose and left. Chester jotted down four words on his note pad: "Identifying the Achievement Path."

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Promptly at nine the next morning, Alice entered Chester's office, took a seat and announced, "Cat, this has been going well but I fear I'm running out of time. I'm hoping we can finish up today."

Chester smiled and said, "That is certainly my goal, too. So, let's zero in on the primary topic of interest: The Achievement Path."

Alice grinned and said, "I was hoping you'd say something like that. I'm also hoping we can work on how I map out a path to my objective."

"Well," hedged, Chester, "you don't exactly map out a path to your objective. Instead, you map the structure of the situation in which your Target Variable is embedded and then you look through that structure trying to identify a path to your objective. Remember, Peter mapped out the structure of the cost accounting system first, and then he was able to identify a path to achieve his objective of reducing the Load Rate and the charges to the programs."

"Okay," said Alice, "I get that. So how do I map the structure of the situation?"

Chester took a sheet of paper from the file folder on his desk, placed it in front of Alice, and said, "Here's a bullet outline of some questions to use in identifying The Achievement Path for an objective. Look them over and then we'll address any questions you might have."

Alice nodded her okay.

The questions Chester gave Alice are listed below.

Questions to Use in Identifying an Achievement Path

- How is my objective currently stated?
- What is the Target Variable at the heart of my objective? What is the focal point for my action?
- What is its Target Value? What value do I want the Target Variable to have?
- What are the Driver Variables? Which variables directly affect the Target Variable?
- What are the Accessible Variables? Which variables can I change the values of through direct, immediate action?
- What are the Connecting Variables? Which variables lead from the Accessible Variables to the Driver Variables?
- What is the path that leads from the Accessible Variables to the Driver Variables and then on to the Target Variable? In other words, what is the Achievement Path for my objective?
- What are the values that the Accessible, Connecting and Driver Variables must have in order to realize the Target Value?
- What actions do I need to take? What changes do I need to make to the Accessible Variables?
- How do I best monitor progress and achievement all along the Achievement Path?

Alice studied the questions for a while, looked up, smiled, and said, "I think I get it, Cat, I see how it all comes together. The best part is I know what the structure looks like that the Target Variable for the objective my boss assigned to me is embedded in. I should be able to map out that structure fairly quickly and easily."

"Great," said, Chester. He placed another sheet of paper in front of her and said, "Here's another bullet point outline, this time of a process for achieving an objective. There is a key point in it I want to go over with you."

"Okay," said Alice, "give me a minute or two to wrap my head around it." Alice studied the bullet point list Chester gave her. They are listed below.

A Process for Achieving an Objective

- Identify the Target Variable – the variable you are trying to affect or change.
- Specify the Target Value - the value you want the Target Variable to have.
- Identify the Achievement Path – the path that runs from those variables you can directly affect with your actions through other variables to the Target Variable.
- Identify the required values of the variables along the Achievement Path that, if those values are realized, will result in the Target Variable having its intended value.
- Change the values of the variables to which you have direct access.
- Monitor the flow of changes in the value of the variables all along the Achievement Path.
- Adjust your actions as conditions warrant.

"I think it get it," said Alice, looking up from the bullet point list, "except for one thing."

"What's that?", asked Chester.

"The bit about identifying the required values of the variables along the Achievement Path. What's that about?"

"Glad you asked," said Chester. "Think of those as intermediate results, of changes in the value of those intervening variables that add up to the desired change in the value of the Target Variable. They allow you to keep tabs on things, to see if things are progressing properly or going awry. They also constitute milestones along the way to your objective."

"I get it," said Alice. "Now what?"

"Well," said Chester, "I think what comes next is for you to get to work mapping the structure in which your boss' objective is embedded and set about identifying the path to achieving it."

"Agreed," confirmed Alice.

Gathering up the papers Chester had given her, Alice stood up and said, "Well, I'm off to work on identifying the Achievement Path for my objective."

"Good luck," said Chester, "I'm confident you will pull it off."

"Me too," smiled Alice. She turned and left Chester's office.

Chester leaned back in his chair, smiled and said to himself, "I would bet large sums at long odds that she pulls it off."

And, indeed she did.

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About the Author

Fred Nickols is a writer, a consultant, a former executive and a retired Navy man, a decorated Chief Petty Officer. Currently, he is the Chief Toolmaker and Lead Solution Engineer at Distance Consulting. If you are interested in purchasing the rights to reproduce or distribute this story, please contact Fred via email.