



Leadership, Strategy & Performance: A Unified Approach

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In Essence

THE CHALLENGE

Our client, faced challenges in aligning leadership accountability, operational efficiency, and strategic execution amid rapid expansion. To address this, they sought a structured performance management framework to define strategic priorities, set measurable leadership goals, and integrate competencies into performance evaluations, ensuring sustained growth and efficiency

THE SOLUTION

Designed and delivered Project S.M.A.R.T, a structured intervention that aligned leadership with the organization's aspirations and goals, introduced measurable success metrics, and established a transparent performance management framework. This ensured clear accountability, competency-based evaluation, and a structured approach to drive sustained growth.

THE IMPACT

The workshop aligned leaders on organizational goals, execution, and performance assessment. The client is now implementing learnings, embedding the PMS framework, and focusing on governance and coaching. While net results are yet to be realized, meaningful change is underway.

THE CHALLENGE

Our client, a leading chain of super-specialty eye hospitals, had recently received a significant investment from a major private equity fund in India and was seeking to expand its existing business lines while entering new verticals. However, with this expansion came challenges in maintaining high standards of medical care, ensuring operational efficiency, strengthening leadership accountability, and achieving long-term strategic alignment.

Despite a strong foundation in clinical expertise, the client recognized the need for a robust performance management framework to drive organizational effectiveness. The leadership team sought a structured approach to align on the organization's strategic objectives, develop measurable goals for the executive team, and define key leadership capabilities necessary for success. The desirable outcomes that were expected out of this intervention were:

- **Define Organizational Imperatives** – Identify top strategic priorities that would shape success over the next 3-5 years.
- **Cascading Goals Across Leadership Hevels** – Develop goal sheets for CEO direct reports and their respective teams, ensuring alignment with corporate objectives.
- **Key Initiatives for Success** – Outline actionable initiatives that would enable the executive team to exceed performance expectations.
- **Leadership Success Model** – Establish leadership capabilities based on core organizational values to integrate with the performance rating system and strengthen leadership effectiveness.

THE DISCOVERY PHASE

The first step in the engagement was to conduct a thorough and independent diagnostic to gain a clear understanding of the organization's context. Through one-on-one discussions with the Promoters and key leadership team members, we explored their perspectives on the organization's vision, cultural values, leadership approach, key challenges, and future aspirations.

The leadership team shared a clear aspiration—to become the leading eye care provider in India and beyond, recognized for clinical excellence, technological innovation, and patient trust. With plans to go public in the next 2-3 years, there was a strong focus on improving financial management, operational efficiency, and leadership effectiveness to support sustainable growth.

While the organization had a well-defined strategy, execution remained a challenge. A fragmented and disengaged management team had led to operational inefficiencies, causing a gap between strategic goals and on-the-ground execution. Leadership accountability needed to be strengthened, particularly in balancing financial performance with patient care excellence. There were also concerns about organizational energy and discipline, which were critical for sustaining momentum and achieving ambitious growth targets. Furthermore, short-term, reactive decision-making was impacting long-term stability and alignment with the organization's vision. The performance management system required significant improvements. KRAs were largely subjective, and the absence of structured performance metrics and formal 360° feedback led to inconsistencies in performance evaluation and leadership development.

At SDF we believe that our inherent mindsets are responsible for the level of our performance. There are self-imposed constraints that arise from fear, self-doubt, lapses in focus & limiting assumptions. Addressing these self-imposed constraints through a comprehensive training intervention would help individuals go through a process of “start with why”, self-reflection and challenging ones limiting assumptions thereby bridging the gap in expertise, performance or proficiency. SDF therefore designed “Project S.M.A.R.T - Enabling Future Growth Aspirations” - a robust one day alignment workshop.

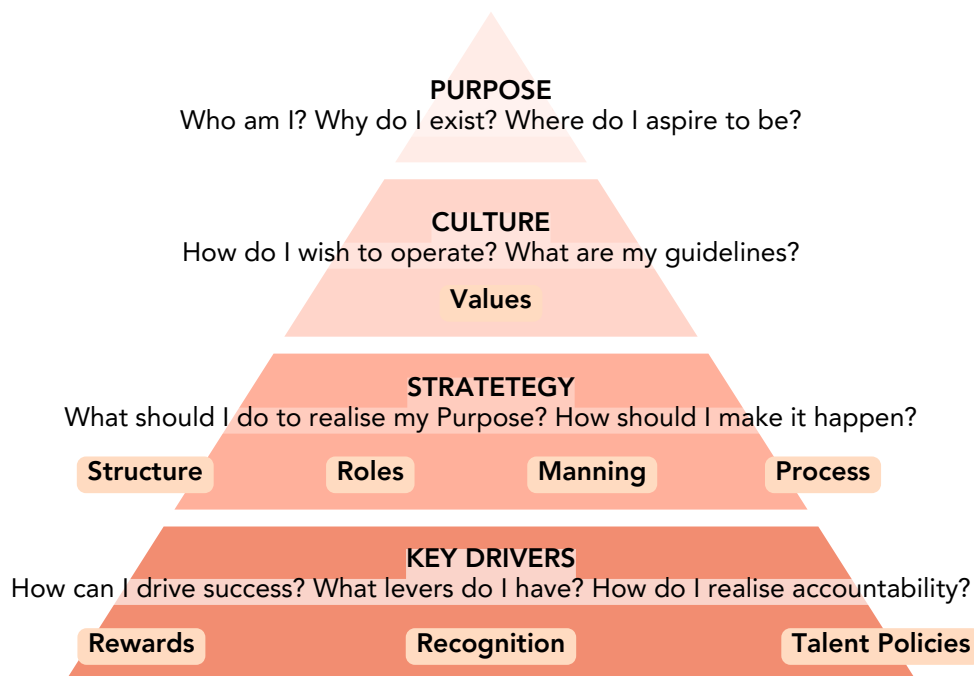
THE SOLUTION

“Project S.M.A.R.T - Enabling Future Growth Aspirations” – was designed as a one-day intensive workshop to understand, analyze, and align the organization’s aspiration and strategic objectives with those of the Promoters and key leadership members, ensuring executive goals were closely linked to the broader organizational vision.

The workshop was specifically tailored for top management, recognizing their critical role in inspiring and guiding middle and lower management toward a common goal. As Simon Sinek emphasizes in Start with Why, people are more likely to commit to a vision when they understand why it matters, rather than just what needs to be done. To enable this realization, the intervention focused on helping leaders internalize the need for transformation and the rationale behind the organization’s strategic direction.

A key tool used in this process was the Purpose, Vision, Mission & Values (PVMV) Pyramid, which provided a structured approach to:

- Reinforce why the transformation was essential.
- Establish a clear connection between organizational purpose and leadership action.
- Drive alignment and accountability at all levels of leadership.



Once the WHAT of the organization—its purpose, vision, mission, and values—was clearly established, the workshop shifted focus to the HOW. This phase was designed to create alignment among leaders on the key enablers of success, ensuring clarity on execution, measurement, and collaboration.

Our facilitators engaged with the participants on the following five critical areas through conversations and activities:

- **Key Activities for Success (Goals):** Leaders identified the specific actions and initiatives required at both organizational and individual levels to drive the strategic objectives forward.
- **Measuring Success (MoS):** Clear metrics and benchmarks were established to track progress, ensuring both organizational and individual leaders had defined performance indicators to measure impact.
- **Support Systems for Success:** Leaders assessed the resources, tools, and team structures required from the organization to overcome challenges and effectively execute their goals.
- **Cross-Functional Interdependencies:** Recognizing the interconnections between departments, the workshop focused on improving collaboration and alignment to break silos and enhance collective impact.
- **Core Competencies and Behaviors:** A set of five differentiating competencies and their associated behaviors were defined as critical drivers of organizational success, setting a clear leadership standard.

And finally, the Leadership Team engaged in a structured brainstorming session to define the core competencies essential for organizational success. This discussion led to the identification of six key leadership competencies, forming the foundation of the organization's success model. Once these competencies were established, the team worked on defining behavioral descriptors, ensuring clarity on the specific actions and mindsets required for success at the leadership level. This step helped in setting clear expectations for leadership behaviors, making them actionable and measurable.

To ensure objective evaluation, a structured rating scale was developed, outlining both acceptable and unacceptable behaviors associated with each competency. This provided a standardized approach to leadership assessment, reinforcing consistency in evaluating performance. Additionally, there was a critical discussion on weightages within the performance management system, where consensus was reached to assign 20% weightage to competencies and 80% to goal achievement. This balance ensured that while business outcomes remained the primary driver of performance assessment, leadership behaviors and organizational values were also factored into the evaluation.

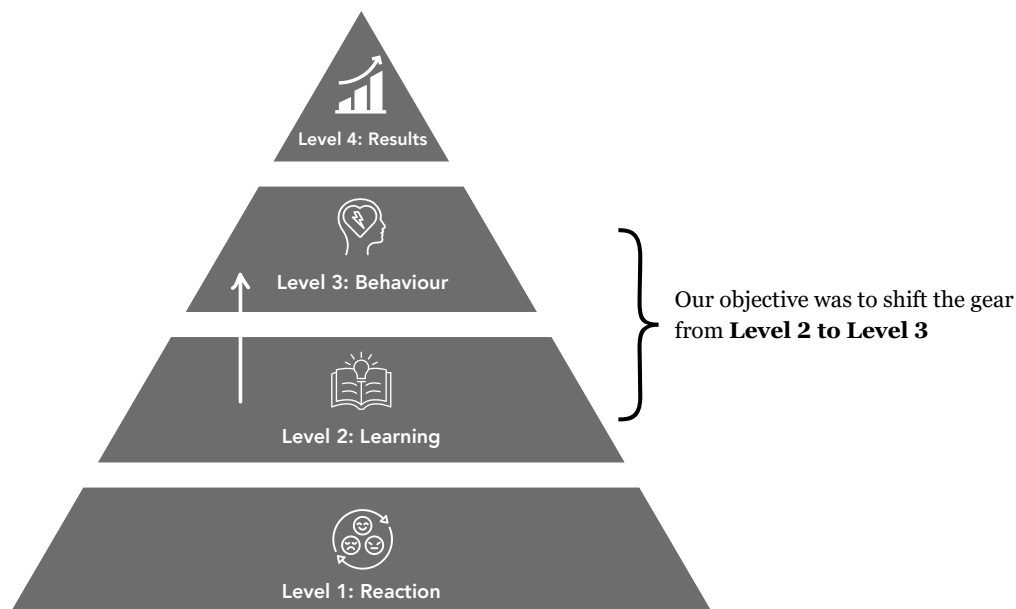
Based on the insights and outputs from the workshop, we collaborated with the client to finalize a standardized goal sheet template, ensuring alignment across leadership. The final goal sheets were developed for all Leadership Team (LT) members and select key stakeholders at the LT-1 level. The detailed principles of goal sheet design and its construct are elaborated in the annexure of this document.

With these elements in place, the final Performance Management System (PMS) rating framework was established for the Leadership Team (LT) and LT-1 levels, integrating both goal achievement and competency ratings. This structured approach aligned leadership expectations with organizational priorities, ensuring a cohesive, transparent, and performance-driven culture to support long-term growth and success.

THE IMPACT

The workshop helped align leaders on the organization's aspirations, their role in achieving them, and the performance assessment framework needed for sustained growth. Participants responded positively, with feedback indicating that they gained greater clarity on their goals, measurable success metrics, and a structured evaluation framework to guide execution.

At Salto Dee Fe (SDF), we view the success of such interventions as a continuous journey. Our role was to facilitate strategic discussions, co-create solutions with the client, and outline the key actions and behaviors necessary to drive results. Strategic change takes time, and the client is now in the process of implementing the learnings from the intervention across the organization. The PMS framework is being embedded, with a focus on effective governance and coaching. While the full impact is yet to be realized, the organization is taking the necessary steps to drive meaningful change.



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ANNEXURE

Principles of Goal Sheet Design

The goal sheet design was structured to ensure clarity, alignment, and measurable impact, reflecting insights gathered from discussions with Promoter family members and key role holders while incorporating the organization's current structure and strategic priorities.

Key principles guiding the design included:

- **Leadership Involvement:** Given the organization's evolving needs, top leaders are expected to take a more hands-on approach for the foreseeable future.
- **Sharpened Focus:** Each leader's goal sheet was limited to 5-6 key objectives, ensuring a clear and concentrated effort on high-impact areas.
- **Material Weightage:** Every objective carried a minimum weightage of 10%, with most set at 15% or higher, ensuring each goal remains significant and impactful.
- **Measurability & Objectivity:** Each Measure of Success (MoS) was designed to be clearly measurable, enabling objective evaluation and ease of assessment.

Sr.	Objective	How Will I Achieve It?	MoS (Measure of Success)	Weightage
	Clarifies the end outcome expected	List of illustrative actions that will help achieving the objective	Quantification of the key elements that spell success for the objective	Focusses actions based on where effort is most needed