

Mandate Template

1. Be Crisp and Clear

Your mandate will be primarily received by both internal audiences and external audiences, so it has to be concise and easily understood across different contexts. Don't use hype and buzzwords. For instance, "AI" is not a very descriptive term. Instead, make sure that your message can be understood by anyone with basic knowledge of your industry.

Think of appealing to audience members, including:

- Employees
- Customers
- Investors
- Market/investment analysts
- Competitors
- Relevant audiences in the general public

The usefulness of the message will depend on how memorable and applicable it is. Going into too much detail and droning on for paragraphs will be more harmful than helpful when it comes to audience retention. Most mandates you'll see are one to three sentences.

2. Be Creative and Positive When Setting Targets

Work closely with your leadership team to analyze the most relevant goals and think creatively about how to present the benefits that your mandate will achieve.

Some examples of target benefits are:

- Cost reduction
- Improved quality
- Speed
- Agility
- Visibility
- Employee productivity
- Compliance

Frame your targets with positive connotations, like an improved efficiency ratio, greater ability to invest in innovation, or hours given back to the business. The tone greatly impacts how the message is received. Don't equate value in terms of terminations. Headcount reduction may be a mechanism to unleash costs, but don't focus on it.

3. Use Meaningful, Quantifiable Metrics

Communicate the hard numbers on how your organization will measure and improve its operations with digital technologies.

In general, meaningful metrics tend to be those that are:

- Relevant to your industry
- Measurable
- Meaningful to your organization (aligning with company values and purpose)

Be explicit yet realistic with the numbers you settle on. If you prepare well, your team can point back to the original statement and demonstrate the achievements made since the announcement.

4. Be Bold

As mentioned above, be realistic with your targets, but avoid selecting them for the sake of convenience. This is your 'moonshot statement'. If you really want to promote change for the years to come, you have to be aspirational and bold.

In my opinion, the best mandates refer to three-to-five-year horizons. Give yourself time to achieve the bold goals. And remember, assert your mandate with confidence. Avoid using excuses like competition or tough market dynamics to justify your pronouncement, because they detract from the message and make your organization appear more reactive than proactive.

5. Example Top-Down Mandates

This guide serves as a good starting point for you to craft your top-down mandate. To help get your thoughts started, the following example statements are the written forms of the mandates covered in the lesson titled: "How to Draft Your Top-Down Mandate."

Healthcare organization example:

Sacred Heart is launching an Intelligent Automation CoE to digitize clinical and back-office operations in order to reduce average cost-to-serve by 25%, while increasing patient and employee satisfaction ratings by 50% and increasing revenue per bed by 30% in the next three years.

Bank example:

YouBank is launching a one-bank initiative to digitize and unify all customer support functions using RPA, in order to reduce costs by \$1B, improve the efficiency ratio by 25%, and create the data necessary for intelligent, predictive decision-making, growing average products per customer by 50% through increased engagement.