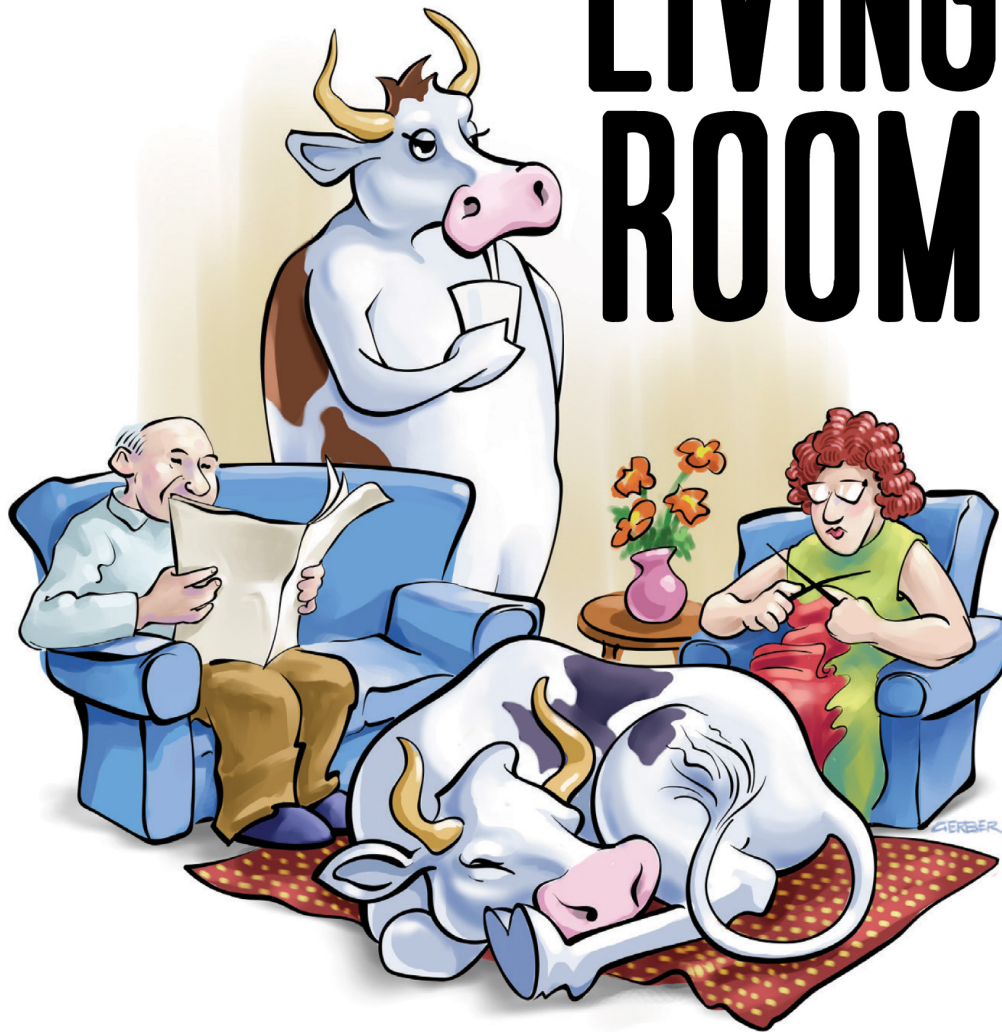




*Developing  
an Effective  
Strategic Plan  
and Sustaining It*

# COWS IN THE LIVING ROOM



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# COWS IN THE LIVING ROOM:

## DEVELOPING AN EFFECTIVE STRATEGIC PLAN AND SUSTAINING IT (The Abridged Edition)

By

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# Introduction

There was once a young farmer, who wanted to find a wife, so he went into a nearby village and successfully courted a woman, married her, and brought her to her new home on the farm. They began their new life together raising dairy cows. As winter began, one day the wife came in and found that all of the cows were in the living room. Astonished, she asked why. Her husband replied, “It’s winter, and the barn has no heat. Since we depend on these cows for our living, they need to be inside.” Slowly, she became more and more accustomed to having the cows indoors. Then, after a few months, a neighbor from her village came over to see how she was doing. When she came into the living room, she was shocked to find the dairy cows there, calmly standing around. “What are you doing with cows in your living room?” she blurted out, to which the wife replied, “What cows?”

This book is about cows – the cows in your living room. Just as the wife became so accustomed to having cows she no longer realized were indoors, so do leaders of most companies and organizations. They don’t realize that they have become satisfied with being “good enough.” Content to leave the cows alone, they just accept the status quo. Without an effective strategic plan, “cows” will become right at home in “your” living room.

What you’ll find in the pages that follow is a plain, simple formula for building a workable strategy to change your company for good. Equipped with the right strategic framework, you will see how to identify a plan for nurturing cows throughout the seasons – without having to bring them indoors to keep your business healthy. Your “farm” will grow and prosper, and you and your team will be much happier, working in a company that knows how to build a professional organization that anticipates and manages change for the better.

What you’ll find in the following pages are our proven techniques to develop a clear mission, vision/intent, and values-based strategic plan that your teammates will understand and adopt. No one will even consider bringing the cows inside for the winter. Enjoy the journey!

## The Cows in Your Living Room

Like the dairy farmer, every company or organization has “cows”. Literally, these “sacred cows” are the core elements of your business – proprietary technology, intellectual property, financial strength, strong performers and leaders, reputation – ***all the qualities that separate you in the marketplace and keep your competitors in your rear view mirror***. These essential elements are your “milk producers”; you have to keep them safe, healthy, and performing at their best.

Unfortunately, most senior executives don’t pay attention to what matters most. As long as there's no bad news or impending crisis at hand, most feel no need to do much more than “shepherd duty”. As long as the herd isn't showing outward signs of illness, most corporate leadership teams operate as though all they need to do is provide support, maintain the milking equipment, conduct regular manure management, and cash the checks coming in.

At those times when bad things *do* happen, these caretaker leaders just manage the wake and ride out the storm. Usually there is someone who can be found to blame, so one standard course of action in crisis management is to find and fire them. Next, they’d control the damage by publishing a corporate statement on what steps are being made to investigate the matter, hunker down, wait for time to pass, and then resume business as usual.

We’ve all seen this behavior demonstrated by senior leaders and their management teams, and the culture of their organization reflects that behavior. Since everything revolves around “business as usual until the wheels come off”, few, if any, of the sacred cows are protected or nurtured. When the inevitable crisis comes, any or all of them are at risk. The top performers are insecure, no one owns the outcomes. There’s no plan of action. Just a culture of reaction.

### ***Companies Who Ignore Their Sacred Cows***

The harsh reality is: After only three years, only 56% of all startup businesses are still in business. Why? Among the leading reasons for failure are:

- A. A lack of a clear focus (an effective strategic framework).
- B. A lack of market awareness.
- C. Pride (read hubris).
- D. Optimism versus discipline.

Perhaps equally troubling is the fact that many more companies fail after making it to their 3-year anniversary -- **71%** are gone by year 10 -- for much of the same reasons. It's clear that ultimately most companies reach the tipping point where the sacred cows are no longer safe – unless their leaders establish and sustain a protective framework.

### ***The Framework for Survival and Growth: Strategic Planning***

If you are going to build an enduring, resilient organization, then you've got to dedicate yourself and your leadership to building and sustaining that operating system. You may have the most creative, innovative intellectual property since the Internet and a tremendous team of professionals with talent, drive, and imagination. Together you achieve a number of successes, weather a few storms. But the evidence indicates that initial success is fragile at best. Very few companies can survive on their last great idea.

The foundation of your system for enduring success lies in building a **strategic planning framework** that works – a **plan of action you and your team establish and share ownership of**. It's not just a written plan; it is a living, breathing document that serves as the foundation of your business life. Your strategic plan captures the culture of your organization and your direction, with measurable outcomes that indicate real progress toward your goals. The strategic plan also serves as the blueprint of your business model, and provides you with an effective engine for making key decisions.

The strategic plan is captured in the first of the Big Six Leadership Principles we call "Set the Azimuth". A Level Five Leader understands the importance of "setting the azimuth" to ensure that an organization has a clear path to success.

The leader is responsible for setting a sense of urgency with unambiguous focus and priorities. The vehicle to make this happen is strategic planning, which creates a living roadmap for an organization.

That said, the last thing you want to do is develop a plan and stick to it no matter what. Your strategy will always have an “as of \_\_\_\_” date. Structure, flexibility, and a wide field of view are all key components of the strategic framework. Your strategic planning system is a *living* process. You must keep it off the shelf and on your desk so it remains relevant.

### ***Three Pillars of an Effective Strategy***

What drives an effective, viable strategic plan? There are three pillars of an effective strategy: ***Mission, Vision (Intent), and Core Values***. These three pillars serve as the foundation upon which your strategy is built. Let’s examine each pillar.

***Mission:*** *The Mission Statement defines your purpose for existing in the first place.* Your company or organization is rudderless without a clear, concise mission statement. Your mission should lie out what you do -- whether it is to make products, build things, serve others, create ideas, or some other function. And it should capture how well you do it -- hopefully better than anyone else does.

***Vision – the Commander’s Intent:*** *The Vision Statement defines where you are going.* The vision gives direction to your company. One of the best vision statements of the commander’s intent ever written was created by President John F. Kennedy in 1963, when he said: “We will send a man to the moon and return him safely by the end of this decade.” The vision was unmistakably clear; millions of people understood and followed it. In 1969, we achieved that incredible goal of placing a man on the moon and returning him safely. The elegance was in the simplicity of JFK’s vision statement, and it translated into outcomes.

In the military, we have translated *Vision* into the *Commander's Intent*. This is because the concept of the intent has more relevance and importance than vision in many respects. The Army's primary doctrinal publication, FM 3.0, defines the Commander's Intent as:

**"...a clear, concise statement of what the force must do and the conditions the force must establish with respect to the enemy, terrain, and civil considerations that represent the desired end state."**

The *Commander's Intent* defines success with a measurable degree of clarity. When everyone knows what the boss wants to happen, they have a shared understanding and focus. They can act individually or as members of a team with what we call "a bias for action." In the absence of other orders or guidance, everyone on your team will know the desired outcome and move toward those goals.

**Core Values:** Finally, *Core Values define you as an organization*. Somehow, this key element of successful strategic planning seems to get lost in translation. For every Enron Corporation or Bernie Madoff, there are dozens of other (perhaps less notorious) examples of companies and senior executives with no core values. They actively or passively allowed themselves and their team to wander far afield of truth, honesty, and character. Cheating, fraud, theft, corruption – are all products of creating a valueless culture in an organization.

### ***Establishing a Culture with Core Values***

Not only do you have to decide what your core values are, you have to repeatedly state what defines you in terms of values in order to establish a culture where everyone understands and buys in to those core values. As a leader, you have to live them, and insist your teammates do as well, with no tolerance for those who don't. It will not happen automatically; you have to lead the establishment of core values.

The founding principles of your organization must be blatantly obvious to everyone you come in contact with on a daily basis. Meetings, signs, posters, tag

lines, greetings, e-mails, letters, business cards – everything reinforces and restates your core values.

You must also find and hire new teammates who are hardwired with your stated core values. The truth is that most people do not embrace your values, and you must deliberately assess and evaluate new recruits before you offer them a position on your team. There are a wide variety of online assessments and techniques to assist in your recruiting efforts. Your goal is to attract and retain team members who can flourish within your company's culture.

Once you have set the conditions by establishing a clear **mission, vision/intent, and core values** for your organization, you can begin to develop your plan of action -- the strategy that will separate you from your competition, build and keep your edge, and grow your team, every day.





## Building the Plan of Action

(So the Cows Don't Have to Come Inside for the Winter)

Knowing who you are, what you do best, and what is sacred to your organization is what forms the basis of your strategic plan. You won't become the leader in your field or the best unit in your organization by chance. You have to earn your place in the market.

Strategic planning provides the structural foundation of your path to get from where you are today to where you want to be. It would seem to be intuitively obvious to devote considerable time, energy, and leadership to building and maintaining this strategy. Yet, most companies do just the opposite – they pay strategic planning lip service at best. Often it is just ignored.

### ***Why Companies Don't Plan for the Future***

It's hard to focus on strategic planning. Many leaders see the critical work as being the *tactical* work; e.g. doing what must be done right now, today, this week. These leaders are completely immersed in getting product out the door, or completing services by close of business. If they are meeting deadlines and making payroll, things are okay.

Faced with the reality of meeting customer demands and managing sales and costs on a daily basis, many leaders lose sight of the long-term plan. You can see this shortsightedness all around you. Thanks to the proliferation of hand held devices which provide instant information, senior leaders can now know virtually every facet of their company's operations, in real time. This means they can micromanage everything from anywhere!

### ***Time for Real Leadership!***

This is where real strategic leadership comes in. It is up to you, the person who owns the future direction of your company, to focus the rest of your team on building and maintaining a **values-based, measured-outcomes strategic plan**. You and your team have established the mission, vision/intent, and shared values

-- the stage is set to overcome the need to micromanage the present and set free the creative energy of your organization. You have to assemble your leadership team for some hard thinking, and face-to-face, frank communication.

Where do you start? Some might answer that the first step is to find an offsite location where you can gather up your leadership team for a couple of days so they are separated from the day-to-day operations. But that's not the first step – the first step is to think about how you want to build the strategy. We call it *thinking through the process*.

### ***The Importance of Assumptions and Trends***

Your strategic framework must be based on establishing a current set of assumptions and trends. Think in terms of 2-3 years going forward. Now you're thinking *strategically* instead of tactically. What are the critical assumptions that, if true, you can build your plan upon? Here are some examples of strategic assumptions and trends:

1. The economy will grow at a pace equal to or greater than the past 3 years.
2. Our unions will ratify their contracts when they come up for renewal.
3. Our C-Suite executives will remain in their current positions for the next 3 years.
4. The partnerships we have in place will remain viable during this planning cycle.

These assumptions should be the starting point of your strategic "Roadmap." If they hold true, then the strategic plan you create will be viable. If any of them change, then you should change the strategic plan.

You'll need to circulate these assumptions and trends with your inner circle first, then edit them based on the senior leader inputs and prepare to bring them to your entire leadership team during the strategic planning session. Be

conservative in your assumptions up front; that is to say, underestimate the positives.

### ***Team Buy In at the Senior Levels***

Once you have established the strategic assumptions, it's important to get the leadership to buy in. You'll have to socialize your key leaders to the process; this will require some focused one-on-one discussions. Then you'll need to have several executive level meetings a couple of months prior to the actual strategic planning session. Regardless of your specific actions leading into the strategic planning event, you have to insure the buy in work gets done. And you are the only one who can do it initially.

### ***Getting an Outside Set of Eyes***

Next, you have to ask for and conduct an external evaluation of your organization and your C-Suite leadership, and determine what plan they are currently using. It's possible there really isn't a single plan in place. You may think so, but the external eyes and ears you bring in for this evaluation will give you a more objective view than anything you can do in-house. An outside subject matter expert (SME) team is your best option for this evaluation. Get someone who knows the ins and outs of change management. Experience is extremely important for this objective assessment. There are both surveys and focused interviews this external team should conduct with a number of your leaders, and their feedback will be a critical component of setting the conditions for success of your strategic planning session. Give them your full support right up front.

Plan for a couple of days for this SME team to visit your organization, and for some phone interviews ahead of time. But also ensure they conduct face-to-face interviews with your key leadership – C Suite and others that you designate. Be prepared to provide them with a read ahead of your mission, vision/intent, and shared values, as well as your current strategic plan (if you have one) and the assumptions and trends it is based upon. The product of this external evaluation

will be an initial SWOT analysis and set of observations you can use to target specific parts of the company you want to sustain –or change.

The final stage of your strategic planning framework is to develop the strategic layout – **The Roadmap**.

***Grab This Free Gift!***

One of the most popular versions we've used in organizations with autonomous business units is available to you as a *free download from our website*. Simply visit

[www.LevelFiveAssociates.com/resources](http://www.LevelFiveAssociates.com/resources)

and you'll find it there.

This Roadmap, when completed during your strategic planning session, will drive the execution of your plan. In this example, the overall strategic focus is on six **Core Strategic Values**:

***S1: Provide World Class Service***

***S2: Develop and Maintain Rewarding Strategic Human Resources Systems***

***S3: Establish and Exploit Self-Determined Opportunities***

***S4: Integrate Technology to Optimize Efficiency and Effectiveness***

***S5: Establish and Maintain Financial Strength***

***S6: Identify and Maximize Key Strategic Relationships*** If you develop different core values, they'll certainly serve the same purpose, but we have seen these used with great effect when backed up by determined leadership.

### ***Another Option: Key Result Areas***

An alternative model that is applicable to manufacturers, distributors, and companies with a more unified focus or product line involves identifying the list of “must do” objectives that we call “Key Result Areas” (KRAs). These KRAs are key to improving company profitability and usually involve tough, hard to do actions that require dismantling “stovepipes” that are prevalent in too many companies.

The strategic planning team first brainstorms a complete list of KRAs without regard to priority or impact on the company’s success. In turn, this list is prioritized and the organization commits to taking on a finite number of the high priority KRAs that can realistically be completed within the next 3 to 6 months with available resources.

The leadership team stands up a Working Group for each KRA and assigns a leader with cross-functional representation from the applicable departments and divisions of the company required to accomplish the task. Generally, these KRAs require significant commitment and require top talent, resources, and support of the leadership team to complete the work. Working Group leader assignments go to up and coming high potential teammates.

The company senior leader team then provides a charter, in writing, to the KRA Working Group to define the objective, resources, and expected timeline for completion.

### ***Another Free Gift!***

You can *download a free sample* of the KRA Roadmap by visiting the resources page on our website at

[www.LevelFiveAssociates.com/resources](http://www.LevelFiveAssociates.com/resources)

In turn, the Working Group assembles to begin work. Step one is to develop a complete project management action plan in sufficient detail to include ownership, tasks, timeline, and expected outcomes.

Along the way, the senior leader team stays involved with the Working Group with scheduled status reviews. The role of the senior leader team is to fully support, resource, and eliminate obstacles for the Working Group.

The KRA is closed out by the senior leader team when objectives are met and company standard operating procedures are revised to fully capture the new direction established by the completed KRA.

As KRAs are closed out, successes are celebrated with a “Victory List” which sets an expectation for momentum and success. The objective is improved profitability and market share.

As KRAs are closed out, the next priority is moved up in the queue for action. The senior leader team develops a new charter for the next KRA, and the cycle continues.

The list of open KRAs drives strategic planning work and is updated/reviewed every 12 months during annual strategic planning.

### ***Building the Strategic Roadmap***

To be able to build the Strategic Roadmap, you have to complete these initial steps prior to the actual strategic planning session:

1. Socialize your senior leadership. Review your Mission, Intent, and Shared Values with them in a face-to-face session well ahead of the SPS.
2. Collectively develop your strategic assumptions/trends.
3. Select, schedule, and conduct a formal external assessment by SMEs for a preliminary SWOT, to include an assessment of your current focus, plan, and leadership.
4. Lay out your Roadmap format, with the Strategic Planning Core Values.

## How to Heat the Barn

Your strategy planning session serves as the formal development of the organization's way ahead. Like the farmer, you have to plan for winter long before it comes. If you just tend to the tasks at hand, then there's a strong likelihood the cows will be in the living room by winter, because you had no plan to install and maintain a heating system for the barn. The SPS, as we'll call it, forces your entire team to plan for all four seasons, even when it may be a delightful spring when you conduct the actual session, and winter seems a long, long way off.

### ***Setting the Agenda for the Strategic Planning Session***

As you have no doubt figured out by now, conducting the Strategic Planning Session (SPS) itself is not something you can prepare for the day before the event. And, you still have one final preliminary step remaining. That step is to set and publish the agenda. This blueprint will drive the flow of the session, so it's worth spending a couple of hours in developing it.

Schedule the SPS at least 3 months ahead of the actual dates. Make it clear to your leadership that this is NOT an optional event. Find a site nearby that has conference support capabilities, and establish a contract so they can do the logistics (food, beverages, etc.) Your team should focus on the content of the SPS.

It's also worth considering who attends the formal planning session. You want enough people there to have the kind of quality interaction and contribution that creates outcomes. On the other hand, if you have people attending who haven't been part of the preliminary work, they are probably not going to contribute much to the results. Our advice is to use the *"Two Levels Down Formula."* *The Two Levels Down Formula = C-Suite + the next level down in your organization.*

Finally, we recommend bringing in at least 2 outside facilitators (external support team) to guide the timeline, take notes, prepare the executive summary, and schedule follow up actions as a result of the SPS. As we have mentioned earlier, experience counts. Your SPS support team should be comprised of leaders and

facilitators who have been successful strategic planners and led companies with significant top and bottom line results. This external support team's preliminary work to develop the SWOT (Strengths – Weaknesses – Opportunities – Threats) is key to your success.

### ***Next Steps After the Strategy Session Ends***

Within 3 business days after your strategic planning session, the outside subject matter experts who facilitated the SPS provide a summary report to the President/CEO, with specific comments and recommendations for approval and distribution to the attendees.

Typically, strategic planning sessions are not recorded. If the company has distributed sites, it might be useful to stream the session so more people can participate. Where possible, though, we recommend bringing the leadership team to one site for face-to-face interaction. The lack of formal recording usually promotes more open discussion, too.

The outside subject matter expert team (SME) will make notes, however, and provide them to the President/CEO in the form of the summary report. As part of the outside subject matter operating agreement, the specific notes of each strategic planning session should always remain confidential, never to be shared with any other organization.

Every quarter going forward, you should conduct quarterly reviews over the succeeding 12 months. The senior leadership should lead each of these Roadmap Reviews (2 hour sessions). During each meeting, the business unit directors or KRA Working Group leaders brief their respective management plan progress with specific metrics indicating success (or lack thereof). Based on these updates, the team modifies selected plans and corresponding portions of the Roadmap if needed.

As you can easily see, now there is a strategic planning **cycle** in effect. You have set a standard of “what right looks like” in your organization for both planning and execution. This is the heart of the process – planning to implementation.



Seems very straightforward, but indeed it is more difficult to establish and maintain than it appears to be. Keep in mind the culture change for a typical organization looking to “turn the battleship” is 2-3 years. That’s 3 full SPS cycles.

### ***This is a Marathon, Not a Sprint***

Why does the process of change take so long? As we’ve talked about before, some of it is an intellectual complacency that sets in if you can consistently make payroll.

We’ve seen more than a few strategic planning failures, both in the military and the corporate world. The primary reason they fail (and by failure we mean nothing meaningful happens as an outcome of the planning) is because the senior executives essentially took the cows for granted. They assumed everyone will always be productive and satisfied, so when they conducted a strategic planning session, the event was literally just for show. In each instance, the organization became intellectually complacent. No one thinks about winter until it comes. Then, it’s too late to heat the barn without crisis managing the whole operation. Crisis management is the antithesis of good strategic planning. It inevitably leads to corporate failure. So if you’re not willing to commit to the process for at least 2-3 years – which should create a tradition through repetition and acceptance – don’t go down this road.



# Thoughts on Farming

We've used the dairy farm analogy in this handbook because it's important to consider your role as a leader in the strategic planning process – you are the “farmer” as steward of your company's future. Level Five leaders focus on the success of the organization, not themselves.

## ***The Numbers Don't Lie***

***It's an established fact that companies which invest in strategic planning and the corollary leader development programs are four times more likely to be successful than those that don't.*** That number should speak for itself. But it takes courage to change.

You have to move beyond that shortsightedness if you really want to be a Level Five Leader and turn the battleship that is your company. It does take time, energy, and preparation to lead strategically. However, the bottom line results and long-term excellence you establish and maintain will create a legacy that will far outlast you. It can't be about you; it must be about the organization. And you must commit to the process for more than one rotation. Three years is the planning window for the Strategic Planning System for a good reason – it takes that long to change.

The cycle starts with a careful review of who you are, what you do, and what your values are. Your leadership team has to participate in this critical stage of your strategic plan. Insist on the C-suite leaders being active members of this review. If they don't seem to have time to attend because of their busy travel schedules and similar excuses, you'll know they are not buying in to the importance of this process. You must make it clear they don't have anything better to do.

Once you've established (or reestablished) your mission, vision/intent, and shared values, the Roadmap process will have traction. Follow through. Assign your best and brightest to help build the strategic planning session, and require your senior executives to be there, too. Everything you establish must have measurable outcomes. Require your senior leaders and Business Unit Leaders to have

management plans with timelines and milestones. Follow through with the periodic reviews. Level Five leaders hold people accountable.

When we served as Army officers in South Korea a few decades ago, the Army had a very short rotation cycle – 1 year – for every person assigned. The result was constant turmoil. Soldiers and leaders came into and out of units every month; it was extremely difficult to build cohesive teams. We had a saying that, “Anything you do in Korea more than 2 times becomes folklore,” because if we could force our strategic planning process to remain consistent with that kind of turnover, we knew the newcomers would come into, and accept, an established process. Senior leaders insisted we remain disciplined and consistent. It paid off in our bottom line: combat readiness prevented war. The North Koreans knew we were a disciplined force, ready to fight and win if needed. They respected our readiness. The process worked.

You have your own challenges, hopefully without the severe personnel turbulence of the Army in South Korea during those years. The “folklore” established through creating and implementing a consistent Strategic Planning Process will grow a culture of excellence in your company. Innovation, profitability, and bottom line profits will all cascade from that culture, led by a team of fiercely loyal Level Five leaders. You’ll establish the enduring foundation for change that will be there long after your watch. So.....***Go for it!***



## About Us

Investing in leader development is the best investment you can make in your future. Level Five Associates represents over 80 years of military, corporate, and non-profit senior leadership experience. We are Army Officers who have commanded Divisions, and we're also company presidents and CEOs of for profit and non-profit companies. As such, we offer unparalleled practical leadership experience, that's been honed in the laboratories of the Army and business.

*"Experience is a prerequisite to progress! Nearly nine years ago I experienced progress as a friend of MG Robert Nixon. He led me to join the volunteer corps at Ft Carson, Co. His guidance and leadership led me to become a Good Neighbor at the Fort. Additionally, his abilities created a friendship for the post and the City of Pueblo, which continues to thrive and grow. Prior to his command this condition did not exist."*

~ Marv Stein

Whether large or small, every organization must grow and retain leaders to remain relevant. Once you know and understand the **Big 6 Leadership Principles™**, you'll see immediate results applying them in your organization. Partnering with Level Five Associates is like having your own "Leadership Board of Advisors." As leaders in the armed services and non-profit and for profit businesses, we get it!

### **Major General Robert W. Nixon**

United States Army (retired)

Major General (Ret) Robert W. Nixon, Jr., retired from active duty on October 1, 2007, after more than 33 years of commissioned service. At the time of his retirement he was Commanding General Division West, First Army and Fort Carson Colorado, having previously commanded the 7th Infantry Division.

Robert was an Armor Officer who served in command and staff positions throughout the Army in the United States and overseas. His command

assignments include: Command of L Troop, 3rd Squadron, 11th Armored Cavalry Regiment at Bad Hersfeld, Germany; Command of 2nd Squadron, 3rd Armored Cavalry Regiment, Fort Bliss, Texas; Command of 1st Brigade, 2nd Infantry Division, Republic of Korea; and Commanding General, 7th Infantry Division, Fort Carson, Colorado.

He also served in several operations, plans, and training staff assignments, including: Deputy Executive Assistant to General Colin Powell, the Chairman of the Joint Chiefs of Staff, and Aide de Camp to General Crosbie Saint, Commander of U.S. Army Europe.

A 1974 graduate of the United States Military Academy, Major General Mixon also holds a Masters of Arts in History from Rice University. He is a distinguished graduate of the National War College (1996), School of Advanced Military Studies (1987), Command and General Staff College (1986), USMC Amphibious Warfare School (1980), Ranger School (1974), and the Armor Officer Basic Course (1974). He has also served at West Point as an Assistant Professor of History (1982-85).

After retirement from the Army, Robert was named President of Magnatag® Visible Systems in the fall of 2007. In September 2009, he became Executive Vice President of Unistel, the employee services company of CDS Monarch, a nonprofit for the developmentally disabled in Rochester, New York. Since that time, CDS Monarch has begun a pioneering program, Warrior Salute, for Veterans with Traumatic Brain Injury and PTSD.

Robert founded leadership company, Level Five Associates, LLC, in 2009. Level Five provides companies, organizations, and individuals with dynamic leadership presentations and tailored, outcomes based leader development programs and strategic planning services.

Robert and his wife Ruth live in Pittsford, New York, and have two sons. Both serve on active duty in the United States Army. Robert has served on the Governor's Commission on Veterans' Affairs, the Board of Directors of the Veteran's Outreach Center in Rochester, New York, and on the Veteran's Business Council. He is also President of the West Point Class of 1974.