

# Strategy & Execution

## *Achieve your goals*

### INSIGHT

*Know yourself. Know your world.*

- + **Internal Organizational Analysis**
  - > Leadership Interviews: 10 interviews or mini-focus groups (45-60 min each) to establish trust and understand your current state
  - > Targeted Document Review: Analysis of financials, engagement data, North Star documents, and culture data to assess areas of improvement
- + **External Market Understanding**
  - > Analysis: Identifying competitive headwinds and tailwinds through frameworks like Porter's Five Forces and PESTLE
  - > Value Proposition: Clarity on your unique value proposition to customers
- + **Leadership Debrief & Next Steps**
  - > Synthesizes the internal and external analysis into actionable debrief and project plan/priorities

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### STRATEGY

*Think big.*

- + **Positioning & Direction**
  - > Review and develop North Star commitments (purpose, mission, vision, values)
  - > Determine where and how you will compete and win
- + **Develop Transformational Strategy**
  - > Identify and prioritize 3-4 long-term (12+ months) initiatives
  - > Deliver project charters with scope, resources, and milestones
- + **Define Operational Strategy**
  - > Deliverable: "Top 10 Success Measures" (KPIs) covering customer, team, process, and financial dimensions
  - > *Upgrade Path: A full, cascaded Balanced Scorecard system for enterprise and department*
- + **Produce Strategy on a Page (SOAP)**
  - > Integrates refreshed North Star, transformational initiatives, and success measures into a single visual

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### EXECUTION

*Work hard.*

- + **Develop Communication Plan**
  - > Plan for communicating the Strategy on a Page (SoaP) to all stakeholders
  - > Refined Transformational Initiative Charters
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  - > Finalized project plans for execution
- + **Design Operating Cadence**
  - > Establish the meeting structure and processes for strategy review and progress management
- + **Develop First 100-Day Package**
  - > A handoff package to kickstart execution
  - > Regular accountability sessions to support your journey towards success

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*Turn strategy into measurable results.*

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