Capability Guide: Strategy

AI Does Not Replace Direction

Document Version 1.0 FINAL | TIO-KR-2026.08.0 | August 2026

Table of Contents

How to use this guide

Read the first three sections for the executive view. Use Sections 5 through 12 to build the capability. Use Sections 15 and 16 for external validation and market context. Use the final checklist to decide what to do next Monday morning.

01 Executive Capability Brief

Strategy is the organization's ability to make clear enterprise choices and translate them into priorities, measures, ownership, resources, leader action, team alignment, and adaptation.

In the context of The Intelligent Organization (TIO™) system, Strategy is not an AI strategy sitting beside the enterprise strategy. It is enterprise strategy for an age in which AI, AI and automation, data, technology, work redesign, risk, and people are changing what is possible and what is required.

This is very important to clarify and emphasize: This is not your “AI Strategy” for the Enterprise, but the “Enterprise Strategy for the Age of AI and AI and automation”. The scope is the whole Enterprise, and Enterprise is the “Unit of Transformation”.

Element	Strategy capability answer
TIO™ Domain	01 - Leadership
Short definition	The ability to make clear enterprise choices and translate them into priorities, measures, ownership, resources, leader action, team alignment, and adaptation.
Plain-English test	Can leaders and teams explain where the organization is going, what matters most, what they own, what is being funded or stopped, how success is measured, and how AI and technology change the path?
Five behaviors	Choose. Focus. Translate. Resource. Adapt.
Three practical outputs	Strategic Choices Cascade, Balanced Scorecard, Strategy/Transformation Program design/charter
Typical accountable owner	CEO, owner, enterprise sponsor, strategy lead, or business unit executive, depending on scale.
Maturity Level 0 headline	No clear enterprise direction exists. AI, automation, data, and technology decisions are disconnected from strategy.
Maturity Level 5 headline	Strategy continuously adapts as markets, technology, workforce, risk, regulation, customer needs, and value evidence change.

The leadership test

A leader should be able to say what the organization is choosing, what it is not choosing, why those choices matter, which capabilities must mature, what will be funded, what will be stopped, how success will be measured, and how the strategy will adjust when evidence changes.

The Strategy capability creates the line of sight from enterprise ambition to actual choices. Without it, leaders can talk about transformation while the organization continues to fund yesterday's priorities, protect old habits, chase disconnected pilots, and measure activity instead of value.

2026.08 ALIGNMENT | Strategy in the refreshed TIO system

Primary outcome contribution: Intelligence, Automation, Enterprise Autonomy

- Choose where Intelligence should expand first, which work should become more automated, and what Enterprise Autonomy the organization must preserve.
- Decide what should remain human, what forms of dependency are acceptable, and what portability, resilience, and recovery are non-negotiable.
- Connect the enterprise strategy to the End-State Architecture, transition routes, capability priorities, and measurable value.

Evidence at managed maturity: Strategy is defined, owned, applied consistently, measured in operation, reviewed through evidence, and improved without weakening trust, accountability, or Enterprise Autonomy.

First refresh move: Add Intelligence, Automation, and Enterprise Autonomy choices to the next enterprise strategy discussion.

02 The Real Problem Strategy Solves

Most organizations do not begin their AI and automation journey with no activity. They begin with too much disconnected activity.

Someone is testing a chatbot. Another team is experimenting with Microsoft Copilot, ChatGPT Enterprise, Claude, Gemini, an automation platform, a process-mining tool, or a vendor-embedded AI feature. A function wants an analytics dashboard. A service team wants intake automation. A finance leader wants faster forecasting. A risk leader wants controls. Employees are already using public tools. The board wants assurance. Customers expect faster service. Costs are rising. Capacity is tight.

None of these pressures is imaginary. The issue is that they arrive before the organization has made the choices needed to absorb them.

That is the Strategy problem. The organization is not short of possible uses. It is short of disciplined choice.

What breaks when Strategy is weak

- AI and technology decisions become tool-first. The organization asks which product to buy before it knows what work should improve.
- Pilots can multiply, but value is hard to prove because baselines, owners, and decision points were not clear at the start.
- Functions move at different speeds. One function experiments, another blocks, another waits, and another spends quietly.
- Leaders fund too much. Capacity spreads thinly across initiatives that all sound important but are not equally strategic.
- Risk is treated late. Privacy, cybersecurity, model risk, legal, workforce, and trust concerns surface after enthusiasm has created commitment.
- Data and technology foundations are exposed only after a use case is already politically important.
- Managers receive messages they did not shape and cannot translate into team-level work.
- Employees hear AI language but do not understand what leaders are building, protecting, or promising.
- The board hears activity updates but not a clear view of strategic value, risk, workforce impact, or evidence.

A weak Strategy capability creates a dangerous kind of motion: the organization looks busy, but it is not necessarily becoming more intelligent. It may be creating more tools, more meetings, more dashboards, more committees, more vendor relationships, and more confusion.

A strong Strategy capability does the opposite. It reduces noise. It gives people a clear way to decide what belongs, what waits, what stops, and what must change. It turns AI and automation from a scattered set of possibilities into a small number of enterprise choices that can be funded, governed, delivered, measured, and adapted.

Why AI makes the Strategy problem more urgent

AI raises the cost of unclear direction because it lowers the cost of starting. When every team can experiment, write, summarize, code, analyze, automate, or generate content with less friction, the organization needs to channel and point the experimentation towards clear direction that is declared, known and understood.

AI also compresses the distance between a strategic choice and a risk exposure. A poorly framed use case can create privacy risk, unreliable output, unmanaged vendor dependency, workforce distrust, flawed customer communication, or decision automation before leaders fully understand what changed.

That does not mean leaders should slow everything down. It means Strategy must create speed with choice. The organization should not wait for perfect certainty. It should choose where AI and automation matter most, what must be protected, what evidence will be required, and what capability gaps must be closed before scale.

03 Plain-English Definition and Boundaries

Strategy is the set of clear enterprise choices, translated into vision, mission, purpose, aspiration, priorities, measures, ownership, resources, leader action, team alignment, and adaptation.

Strategy Capability is a repeated organizational ability: choose direction, focus attention, translate choices into action, move resources, and adapt when evidence changes.

The five behaviors

Behavior	Plain meaning	Evidence that it is happening
Choose	Make clear enterprise choices about direction, value, customers, services, capabilities, and boundaries.	Approved enterprise choices; documented trade-offs; explicit stop/defer decisions.
Focus	Reduce noise into the few priorities that matter most.	A short priority set; visible links to funding and leadership attention.
Translate	Turn strategy into measures, owners, leader actions, team priorities, communication, and change.	Strategy Scorecard; owner map; leader action plans; team priority maps.
Resource	Move money, time, people, attention, and incentives toward the strategy.	Funding choices; capacity allocation; performance and reward alignment.
Adapt	Revisit choices as evidence, technology, risk, workforce, and market conditions change.	Quarterly review pack; decision log; updated priorities based on evidence.

What Strategy owns

- Enterprise direction and strategic choices.
- Enterprise Priority setting and trade-offs.
- Resource and funding choices that express the strategy.
- The link between strategy, capabilities, value, risk, and resource decisions.
- Translation of strategy into measures, ownership, leader action, and team alignment.
- The strategy review and adaptation rhythm.

What Strategy does not own

- Daily execution management. That belongs in normal operations and the Transformation capability.
- Detailed change management. That belongs in People Change and Adoption, with Leadership sponsorship.
- Every communication activity. Strategy sets the message discipline; communications and change teams help deliver it.
- Every project plan, backlog, product roadmap, technology roadmap, or data remediation plan.
- An AI strategy that sits beside the enterprise strategy. AI must be part of the enterprise strategy, not a separate side plan.

> **Boundary rule: the TIO perspective**
>
> Strategy chooses where the organization is going and what matters most. Transformation mobilizes the organization to act on those choices. Factory turns selected opportunities into measured value. Data and Technology provide the foundations. People helps the workforce understand, adopt, and adapt.

04 Role in the TIO System

TIO Framework consists of five domains: Leadership, Data, Technology, Factory, and People. The operating logic is simple: Leadership directs. Data informs. Technology enables. Factory produces. People shape and sustain.

Strategy is the first Leadership capability because **it gives the other domains direction**. It tells Data which information matters most. It tells Technology which foundations and platforms deserve attention. It tells Factory which improvement opportunities matter enough to enter the value engine. It tells People what change must be explained, supported, and sustained.

Domain relationship	What Strategy needs	What Strategy gives back
Leadership	Mandate, fluency, governance design, risk posture, transformation sponsorship.	Direction, trade-offs, priorities, success measures, funding logic, adaptation rhythm.
Data	Evidence about customers, operations, finance, risk, workforce, and current performance.	Priority data domains, definitions of value, data readiness questions, decision needs.
Technology	Practical view of platforms, architecture, integration, resilience, vendor dependencies, and AI tool lanes.	Technology priorities, investment posture, modernization focus, build/buy/partner logic.
Factory	Evidence from Discovery, Measurement, Evidence Gates, and scaling decisions.	Strategic filters for AI Use Cases, automation opportunities, work redesign, and value hypotheses.
People	Workforce sentiment, skills, adoption barriers, role impacts, trust concerns, and manager readiness.	Clear change story, workforce commitments, leader priorities, and role clarity triggers.

What breaks elsewhere when Strategy is weak

Data becomes a debate about every number instead of a disciplined focus on the data that matters most. Technology becomes a fight over tools, platforms, and vendor promises instead of a roadmap tied to enterprise direction. Factory becomes an idea funnel with no strategic filter. People hear change messages that are broad, vague, or late. Governance becomes either a blocker or an afterthought because no one knows what risk posture the strategy requires.

Strategy does not replace the other TIO capabilities. It gives them the direction they need to mature in the right order.

05 The Strategy Operating Model

Strategy is not fixed. It is a living "thing" that needs to be aware of its internal and external environment and be ready to react in time to take advantages of opportunities while mitigating threats and risks. A Strategy capability must, therefore, work as an operating model, not a once-a-year exercise. The organization needs a simple way to trigger strategic work, gather inputs, make choices, translate choices, review evidence, and adapt.

Element	Strategy operating model
Triggers	New mandate; major market shift; AI or automation pressure; strategy refresh; board request; major investment decision; poor value evidence; risk event; growth strain; merger or restructuring; workforce change.
Inputs	Mandate, customer and market evidence, financial baseline, operational pain, workforce reality, TIO maturity assessment, AI usage review, data and technology readiness, risk posture, competitor/peer signals, regulatory context.
Core process	Clarify ambition; diagnose current reality; make choices; define capabilities; translate into scorecard and activation map; fund and sequence; review evidence; adapt.
Decisions	Where to play; how to win; what capabilities to build; what to fund; what to stop; what risks to accept; what AI Value Priorities matter; what work enters the Factory.
Handoffs	Governance for decision rights; Risk for controls and appetite; Transformation for roadmap and workstreams; Factory for AI Use Case pipeline; Data and Technology for readiness actions; People for change, adoption, skills, roles, and culture.
Cadence	Annual or semi-annual strategic choice refresh; quarterly strategy review; monthly leadership rhythm for progress, decisions, blockers, and evidence; event-based review when material assumptions change.
Evidence	Enterprise Choice Set; Strategy Scorecard; Strategy Activation Map; funding decisions; owner map; decision log; quarterly review pack; stop/defer list; updated assumptions.
Escalations	Unresolved strategic trade-offs, funding conflicts, risk acceptance, portfolio overload, cross-functional dependency, workforce trust issue, data or technology blocker that prevents strategic value.

The repeatable Strategy cycle

1. Clarify the ambition and the strategic problem. What must the organization become, and why now?
2. Build the current reality view. What is happening with customers, operations, economics, people, risk, data, technology, and AI activity?
3. Make the choices. Where will we play? How will we win? What capabilities must we build? What systems must support this?

4. Translate the choices. What are the few priorities, measures, owners, funding choices, leader actions, and team priorities?
5. Connect to TIO. Which Data, Technology, Factory, and People capabilities must mature to make the strategy real?
6. Run the review rhythm. What evidence shows progress, risk, value, adoption, capacity, and changing assumptions?
7. Adapt. What should scale, stop, be redesigned, be deferred, or be protected based on evidence?

The cycle should be light enough to use and strong enough to affect decisions. If it produces a polished deck but does not change funding, attention, accountability, and work, the Strategy capability is not yet mature.

06 Processes, Methods, Tools, and Techniques

The Strategy capability uses a small set of practical methods. The goal is not to force one strategy school on every organization. The goal is to help leaders make better choices and translate those choices into evidence-backed action.

6.1 Mandate Conversation

The Mandate Conversation is the first leadership discussion. It should not begin with AI tools. It should begin with purpose, ambition, pressure, risk, trust, value, workforce reality, and capacity.

- What is the organization here to do?
- What must it become over the next three to five years?
- What is the leader trying to build and protect?
- Where is the organization already straining?
- How do AI, automation, data, technology, labor, cost, service, competition, regulation, and trust change the answer?
- What would happen if nothing changed?

6.2 Strategic Choices Cascade

The Strategic Choices Cascade, originally developed by Roger Martin, turns ambition into choices. It is useful because it forces leaders to answer a linked set of questions rather than produce a broad wish list.

Question	Plain-English meaning	TIO use
What is our winning aspiration?	What are we trying to become?	Anchor the Enterprise Ambition and desired value.
Where will we play?	Which customers, markets, services, geographies, communities, channels, needs, or workflows will we focus on?	Set scope and avoid spreading capacity everywhere.
How will we win?	What makes us different and worth choosing?	Clarify value proposition and operating advantage.
What capabilities must we build?	What must we become reliably good at?	Connect strategy to the TIO Capability Model and target maturity.
What management systems must support this?	How will we measure, govern, fund, communicate, reward, and adjust?	Translate choices into scorecard, governance, portfolio, leadership rhythm, and Evidence Gates.

6.3 Strategy Scorecard

The scorecard is not a reporting exercise. It is the bridge between choices and leadership behavior. A good scorecard is small, decision-useful, and balanced across the outcomes leaders must manage.

Scorecard area	Example strategy measures
Financial and value	Revenue, margin, cash flow, cost-to-serve, productivity, avoided cost, capital efficiency, value realized from priority use cases.
Customer, resident, or market	Retention, satisfaction, speed, trust, service access, market share, referrals, complaint reduction, public value.
Operations and execution	Cycle time, quality, rework, decision latency, service levels, throughput, dependencies resolved.
Risk and trust	Data exposure, cyber resilience, vendor risk, AI output risk, audit findings, incident readiness, privacy exceptions.
People and culture	Manager readiness, adoption, role clarity, AI fluency, workforce trust, skills progress, change saturation.
Capability maturity	Target TIO maturity levels, priority capability gaps closed, evidence reviewed, readiness actions completed.

6.4 AI Value Priority Filter

AI Value Priorities are the strategy-level filters that tell the Factory which kinds of AI Use Cases and automation opportunities matter most. They keep the organization from treating every AI idea as equally attractive.

- Does this opportunity support a strategic choice?
- Does it improve work that matters enough to redesign?
- Can we name the owner, baseline, value hypothesis, users, data needs, controls, and decision point?
- Is the organization ready enough to test it safely?
- Would this be worth doing even if the technology were less exciting?

6.5 Strategy Activation Map

The Strategy Activation Map turns the Enterprise Choice Set into work that leaders and teams can carry. It connects the strategy to owners, leader actions, team priorities, funding choices, capability gaps, and the review rhythm.

This is where TIO avoids the most common failure of strategy: leaders agree in the room, then everyone returns to the old work.

6.6 Quarterly Strategy Review

The quarterly review is where strategy becomes a living capability. The review should not be a status tour. It should make decisions.

- What changed in the external environment?
- What does the scorecard show?
- What strategic assumptions are holding or failing?
- Which AI Use Cases or transformation efforts produced evidence?
- What is blocked by Data, Technology, Factory, People, risk, or capacity?
- What should we fund, stop, scale, redesign, defer, or protect next quarter?

07 Practical Outputs and Artifact Standards

Every TIO capability must produce no more than three official practical outputs. For Strategy, the outputs are Enterprise Choice Set, Strategy Scorecard, and Strategy Activation Map. Supporting tools can exist, but these three outputs are the capability standard.

Output	Purpose	Quality standard
Enterprise Choice Set: Strategic Choices Cascade	State where the organization is going, how it will create value, what it will pursue, what it will not pursue, what capabilities must mature, and how AI, automation, data, and technology affect the path.	Short, clear, choice-based, understandable by leaders and managers, explicit about trade-offs, and linked to capability maturity.
Strategy Scorecard: Balanced Scorecard	Show whether the strategy is working across financial, customer, operational, people, risk, trust, capability, and value dimensions.	Few measures, balanced, decision-useful, with owners, baselines where needed, review cadence, and links to action.
Strategy Activation Map: Strategy/Transformation Program plan, design, structure	Map strategic priorities to workstreams, owners, resources, leader actions, team priorities, AI Value Priorities, capability gaps, and review rhythm.	Names accountable owners, funding choices, capacity implications, near-term actions, handoffs to other domains, and evidence needed for next decisions.

Enterprise Choice Set: artifact standard

- Must answer the Strategic Choices Cascade in plain language.
- Must include explicit choices and non-choices. If everything is included, the document is not a strategy.
- Must connect to enterprise purpose, value, customers or stakeholders, risk posture, and the role of AI, automation, data, and technology.
- Must identify the capabilities that must mature. This includes TIO capabilities, not only technical capabilities.
- Must be short enough for senior leaders and managers to use. A long deck can support it, but the Choice Set itself should be concise.

Strategy Scorecard: artifact standard

- Must include a small number of measures that leaders actually review.
- Must balance financial outcomes with customer, operational, risk, people, trust, and capability measures.
- Must include baselines where value claims require proof.
- Must distinguish leading indicators from lagging results.
- Must trigger decisions when measures show drift, risk, or new evidence.

Strategy Activation Map: artifact standard

- Must show priority owners and decision rights.
- Must show what will be funded, stopped, deferred, or protected.
- Must show which AI Use Cases, automation opportunities, or workflow redesigns are strategic enough to enter Discovery.
- Must show which Data, Technology, Factory, and People capabilities are required.
- Must include leader actions, team translation, communication needs, and review cadence.

08 Accountability, Ownership, and Decision Rights

Strategy cannot be delegated to a workshop facilitator, consultant, technology team, project office, or AI champion. Those groups can support the work. They cannot own the enterprise choices.

The accountable owner must have enough authority to convene leaders, force trade-offs, protect focus, move resources, and bring unresolved choices back to the executive sponsor or governing body.

Role	What they are accountable for
Board or governing body	Approves or oversees enterprise direction, risk posture, major investments, and strategic value evidence where governance requires it.
CEO, owner, city manager, or enterprise sponsor	Sets ambition, makes trade-offs, protects focus, decides what will be funded or stopped, and keeps strategy connected to trust and value.
Leadership team	Debates, commits, translates, resources, and reviews the strategy as a team. Functional agreement is not enough; enterprise commitment is required.
Strategy lead, chief of staff, or transformation lead	Runs the process, documents choices, prepares scorecards, tracks decisions, maintains the activation map, and coordinates review.
Functional and business-unit leaders	Translate enterprise choices into functional priorities, capacity commitments, team actions, data and technology needs, and adoption work.
Finance	Connects choices to funding, value measures, investment governance, benefits tracking, and resource trade-offs.
Data, Technology, Factory, People, Risk	Advise on readiness, constraints, capability gaps, evidence, workforce impact, and practical execution requirements.

Decision rights Strategy must clarify

Decision	Who typically decides	Evidence needed
Enterprise direction and ambition	CEO/owner/executive sponsor with board or governing-body input where applicable.	Mandate, external pressure, current performance, risk, capacity, and stakeholder context.
Strategic priority set	Leadership team, chaired by the executive sponsor.	Choice Set, scorecard baseline, capability maturity, capacity view.
Major funding and stop/defer decisions	CEO, CFO, executive committee, owner, or portfolio governance body.	Value logic, risk, capacity, strategy fit, opportunity cost.

Decision	Who typically decides	Evidence needed
AI Value Priorities	Executive sponsor and leadership team, with Technology, Data, Risk, Factory, and People input.	Use case demand, data readiness, risk posture, value hypothesis, workforce impact.
Quarterly adaptation	Leadership team through strategy review rhythm.	Scorecard, Evidence Gates, decision log, risk and adoption evidence.

Scale-fit accountability pattern

Operating reality	Strategy accountability pattern	Practical warning
Owner-led business **(10 – 50 FTEs)**	Owner or founder owns the strategy directly. A trusted manager or advisor may help document choices and scorecard.	Do not build a strategy bureaucracy. Use owner judgment, a simple scorecard, one or two priorities, and fast feedback.
Managed enterprise **(50 – 200 FTEs)**	CEO or owner plus small leadership group. Managers must understand what they are expected to carry.	Do not ask managers to execute a strategy they cannot explain.
Mid-sized enterprise **(200 – 1,000 FTEs)**	CEO and senior team with a strategy, chief of staff, or transformation lead maintaining the rhythm.	Do not let workstreams outrun strategic focus.
Large enterprise **(1,000 – 25,000 FTEs)**	CEO, executive committee, and board connection, with formal strategy owner and portfolio links.	Do not confuse initiative volume with enterprise value.
Large distributed enterprise **(25,000+ FTEs)**	Enterprise sponsor plus business-unit or regional owners operating within shared standards and local adaptation rules.	Central control alone will be too slow. Local decision authority alone will fragment the enterprise.

09 Skills Needed

The Strategy capability requires leadership judgment, not only planning skill. In the age of AI, executives do not need to become technologists, data scientists, or automation architects. They do need enough fluency to understand how AI, automation, data, and technology change strategic choices, value, risk, work, and people.

Skill level	Skills needed	How to build them
Executive	Strategic choice, enterprise trade-offs, AI-aware judgment, financial logic, risk appetite, resource allocation, portfolio focus, board or governing-body communication, workforce stewardship.	Mandate conversation, Executive AI Fluency Program, strategic choice workshops, scorecard reviews, board briefings, quarterly strategy reviews.
Practitioner	Strategy facilitation, evidence gathering, scorecard design, capability mapping, benefits logic, stakeholder synthesis, decision logging, activation mapping, facilitation of trade-offs.	TIO practitioner training, facilitation practice, scorecard design, maturity assessment work, strategy review preparation.
Functional leader	Translation of enterprise choices into function-level priorities, capacity, team expectations, data and technology needs, change implications, measures.	Leader activation sessions, ALA, functional planning, manager cascade, portfolio review participation.
Manager and workforce	Understanding what the strategy means for work, safe AI use, priorities, measures, role expectations, concerns, and team habits.	Manager Activation Pack, Change Story, team activation, AI fluency basics, adoption support.

Common skill gaps

- Leaders talk about strategy but avoid real trade-offs.
- Executives understand AI headlines but have not personally used the tools enough to sponsor with judgment.
- The leadership team can name priorities but cannot say what will stop competing for attention.
- Measures exist, but they do not change decisions.
- Strategic choices are not translated into leader actions, team priorities, incentives, and communication.
- Strategy reviews are status meetings, not decision meetings.
- The organization confuses a roadmap with a strategy.

10 Maturity Model: 0 to 5

The TIO maturity model scores what the organization can prove and use, not what it hopes is true. Strategy maturity is not about how polished the strategy document looks. It is about whether the organization can make choices, translate them, resource them, measure them, and adapt them.

Level	What it looks like	Evidence	Value and risk	Next move
0 Absent	No clear enterprise direction exists. AI, automation, data, and technology decisions are disconnected from strategy. People may be busy, but no shared choice system exists.	No approved choice set, no usable scorecard, no named owners, no decision log, no visible link between AI activity and enterprise priorities.	Value is accidental. Risk is high because tool, vendor, and project decisions can drift without a strategic anchor.	Run a mandate conversation. Create a first Enterprise Choice Set and name one accountable owner.
1 Initial / Ad-Hoc	Some leaders discuss direction, but choices depend on individual preference, urgency, vendor pressure, or the loudest problem. Priorities shift often.	Strategy notes, informal priorities, disconnected plans, scattered AI pilots, inconsistent funding choices.	Some useful work may happen, but capacity is wasted and people learn that priorities are unstable.	Turn informal direction into a simple, written Choice Set. Name the few priorities that matter now.
2 Repeatable	A basic way exists to discuss direction and priorities, but translation into resources, owners, measures, and team action is uneven.	Planning cadence, draft priorities, early scorecard, partial owner map, some linkage to AI and technology decisions.	The organization gains focus but still relies on leaders to translate locally. Risk remains when measures and resources do not follow.	Create the Strategy Scorecard and Activation Map. Link priorities to owners, funding, and first review cadence.

Level	What it looks like	Evidence	Value and risk	Next move
3 Defined	Strategy is documented, owned, communicated, and translated into priorities, measures, owners, leader actions, and team priorities.	Approved Choice Set, scorecard, activation map, leadership alignment, manager cascade, communication and change implications, decision log.	The organization can align work and make more consistent decisions. The risk is that strategy becomes static if reviews are weak.	Connect strategy to funding, portfolio choices, performance reviews, Evidence Gates, and quarterly adaptation.
4 Managed	Strategy is tied to funding, scorecards, portfolio decisions, risk appetite, performance reviews, and quarterly evidence-based reviews.	Quarterly review packs, funding alignment, portfolio stop/start decisions, performance and rewards links, evidence from Factory, maturity assessment updates.	Value becomes provable and resource decisions improve. The risk is over-management or scorecard overload.	Simplify measures, improve strategic learning, and use evidence to adapt choices faster.
5 Optimized	Strategy continuously refreshes as markets, technology, workforce, regulation, risk, customer needs, and evidence change. The organization adapts without losing coherence.	Living strategy rhythm, clear assumptions, rapid adjustment, mature scorecard, disciplined portfolio, active capability maturity management, enterprise learning loop.	The organization uses strategy as an adaptive management system. Value compounds because learning changes choices, not just reports.	Protect simplicity. Keep testing assumptions, scanning the environment, and maturing dependent capabilities.

How to score Strategy honestly

- Do not score the strategy deck. Score the evidence that choices are used in decisions.
- Ask leaders and managers to explain the strategy without reading from a document.
- Review whether funding, capacity, leadership priorities, and incentives changed after the strategy was agreed.
- Check whether AI Use Cases, automation opportunities, and technology investments are filtered by strategy.
- Look for stop, defer, redesign, or scale decisions. A mature strategy capability does not only approve work; it also stops weak work.
- Look for adaptation. A strategy that never changes may be stable or may be ignored. Evidence decides.

11 Evidence, Measures, and Value

Strategy maturity must be evidenced. The organization should be able to prove that the capability exists, that people use it, and that it improves decisions and value.

Evidence type	What it means	Strategy examples
Existence evidence	The capability exists in a visible form.	Enterprise Choice Set, Strategy Scorecard, Strategy Activation Map, owner map, funding logic, review cadence.
Use evidence	People actually use the capability in decisions and work.	Investment reviews reference strategy, managers translate priorities, AI Use Cases are filtered, stop/defer decisions are logged.
Value evidence	The capability improves outcomes that matter.	Better strategic clarity, stronger resource alignment, faster decisions, fewer low-value initiatives, more value from selected use cases, improved trust.

Useful Strategy measures

Measure	What it tells us	Good use	Bad use
Strategic clarity	Whether leaders and managers can explain direction, priorities, and their role.	Tests whether strategy travels beyond the executive room.	Becomes a survey score with no follow-up.
Priority focus	Whether the organization has a small number of enterprise priorities.	Prevents overloading capacity.	Used to hide important work that still needs resources.
Resource alignment	Whether money, capacity, leadership attention, and incentives support the strategy.	Shows whether choices are real.	Claimed without reviewing actual budgets and calendars.
Measure quality	Whether scorecard measures are few, meaningful, and decision-useful.	Keeps measurement tied to decisions.	Creates KPI overload.
Strategy translation	Whether leaders and teams have translated the strategy into their work.	Shows adoption of direction.	Turns into template completion.
Adaptation discipline	Whether strategy is reviewed and adjusted when evidence changes.	Keeps strategy alive.	Becomes constant churn without decision discipline.

Not all Strategy value appears as direct financial return. Some of the value comes from better choices, fewer distractions, better risk posture, stronger trust, clearer funding, and faster course correction. Strategy also creates value indirectly by making Data, Technology, Factory, and People work on the right problems.

How Strategy creates value

- It reduces wasted capacity by narrowing the priority set.
- It improves AI and automation value by selecting use cases tied to real enterprise outcomes.
- It reduces risk by clarifying what must be protected before work scales.
- It improves technology investment by linking platforms, architecture, integration, and resilience to direction.
- It improves data work by naming the data that matters most for strategic decisions and priority use cases.
- It improves workforce trust by giving people a clear explanation of what the organization is building and protecting.
- It improves board confidence by replacing activity updates with evidence-based value and risk discussions.

12 How to Build and Mature the Capability

The Strategy capability should be built with the lightest structure that creates clarity, accountability, trust, and value. Do not build a strategy office before leaders have made choices. Do not buy a strategy execution platform before the organization knows what it is trying to execute.

Stage	What to build	What to avoid
First 30 days	Confirm sponsor and accountable owner. Run mandate conversations. Gather current strategy, scorecards, AI activity, major initiatives, risk concerns, data and technology constraints, workforce issues, and current governance routines.	Starting with software selection, a full transformation office, or a long diagnostic that delays choices.
Days 31 to 60	Facilitate **Strategic Choices Cascade**. Draft Enterprise Choice Set. Identify AI Value Priorities. Start **Balanced Scorecard** design. Launch or align with TIO Maturity Assessment.	Creating a strategy deck that does not force trade-offs or name owners.
Days 61 to 90	Finalize Choice Set, Scorecard, and Activation Map. Identify Workstreams, Name owners. Connect to funding, governance, Factory Discovery, Data and Technology readiness, People change story, and first review cadence: design, develop and charter your **Strategy/Transformation Program**.	Launching too many workstreams before the strategy can be explained by managers.
First 12 months	Run quarterly strategy reviews. Connect Evidence Gates, value reviews, risk updates, maturity progress, and workforce feedback to strategy adaptation.	Treating the first strategy output as finished. Strategy matures through review and use.
Year 2 and beyond	Continuously improve the capability. Simplify measures, adjust priorities, mature dependent capabilities, and build enterprise learning into the leadership rhythm.	Letting the strategy harden into ceremony or drift into a portfolio reporting exercise.

Minimum viable Strategy capability

The minimum viable Strategy capability is not a complete strategic planning system. It is enough choice discipline to guide the next round of action. It should include:

- one clear enterprise ambition or mandate statement;
- three to five strategic choices or priorities;
- explicit non-choices or stop/defer decisions;
- a simple scorecard with a few useful measures;
- named accountable owners;
- a first Strategy Activation Map;
- one review rhythm that produces decisions.

How to move between maturity levels

Move	Build this next
0 to 1	Create a mandate conversation and name the strategy sponsor. Stop pretending scattered activity is strategy.
1 to 2	Make the first Strategy cycle repeatable: choice conversation, priority set, scorecard draft, owner map, review cadence.
2 to 3	Document and communicate the strategy. Translate it into owners, measures, leader actions, team priorities, AI Value Priorities, and resource choices.
3 to 4	Tie strategy to funding, portfolio decisions, risk posture, performance reviews, Evidence Gates, quarterly value reviews, and maturity progress.
4 to 5	Make adaptation normal. Use evidence, market shifts, technology changes, workforce signals, and risk patterns to refresh strategy without losing coherence.

13 Scale-Fit Application

The Strategy capability is the same capability across organizations, but it should not look the same at every scale. TIO guides are organized by operating reality, not headcount alone. The right design is the lightest structure that can create clarity, accountability, trust, and value.

Operating reality	What Strategy should look like	Core outputs
Owner-led business	The owner is still the system. Strategy should be a simple owner mandate, a few choices, a small scorecard, one practical AI Use Case shortlist, and a monthly owner review rhythm.	Owner Mandate; simple scorecard; First AI Use Case Shortlist.
Managed enterprise	Managers are becoming the system. Strategy must become simple enough for managers to carry. It should connect priorities, manager expectations, safe AI practice, and one to three AI Use Cases.	Enterprise Ambition; simple scorecard; manager expectations; first 12-month plan.
Mid-sized enterprise	The leadership team and transformation rhythm must become the system. Strategy should set a focused priority set, scorecard, workstreams, maturity assessment, AI fluency, and Evidence Gates.	Strategic Choices Cascade; Balanced Scorecard; strategic priorities; Leadership Principles.
Large enterprise	Governance, portfolio discipline, and cross-functional execution must become the system. Strategy must guide a focused enterprise AI Use Case portfolio, decision rights, readiness actions, and board visibility.	Enterprise Scorecard; AI Value Priorities; Enterprise AI Use Case Portfolio; Board Update.
Large distributed enterprise	Federation, local decision authority, shared standards, and enterprise coherence must become the system. Strategy must define common standards, where local adaptation is allowed, and how learning will move across units.	Enterprise Coherence Principle; unit-level translation; federated portfolio rhythm; cross-enterprise learning forum.

The danger at small scale is overbuilding. The danger at large scale is under-governing. The danger at distributed scale is either central bottleneck or local fragmentation. Strategy must fit the operating reality.

14 Role in the Enterprise Transformation Program

Strategy is not the whole Transformation Program. It is the capability that gives the program direction. In TIO, the first 12 months usually follow four practical phases: set the mandate, make strategic choices, build the transformation or portfolio rhythm, and mobilize and prove value: crawl and walk, before you can run and (ultimately) – fly!

Transformation phase	Strategy role	Strategy outputs
1. Set the mandate	Clarify what the organization must become, why now, what must be protected, and how AI, automation, data, technology, people, risk, and trust change the answer.	Mandate notes, Enterprise Ambition, Transformation Mandate, early strategic problem statement.
2. Make strategic choices	Turn ambition into choices about where to focus, how to create value, what capabilities must mature, and what management systems must support the change.	Enterprise Choice Set, Strategy Scorecard, AI Value Priorities.
3. Build the transformation or portfolio rhythm	Connect strategic choices to governance, funding, workstreams, maturity assessment, AI Use Case portfolio, readiness actions, and decision rights.	Strategy Activation Map, portfolio filters, review cadence, priority capability targets.
4. Mobilize and prove value	Use evidence from Factory, Data, Technology, People, Risk, and value reviews to decide what should scale, stop, continue, redesign, or be deferred.	Quarterly strategy review pack, decision log, updated priorities, board or owner update.

Strategy and Evidence Gates

Strategy decides what types of value matter. Factory Evidence Gates prove whether specific AI Use Cases, automation opportunities, and work redesigns delivered what they promised. The quarterly strategy review should use Evidence Gate decisions to adapt the strategy, not only to celebrate completed work.

The clean pattern is: Strategy sets the value direction. Discovery finds candidate opportunities. Design shapes the work. Delivery launches. Measurement proves. Scaling decides what happens next. Strategy reviews the evidence and adjusts focus.

15 Best Practices, Industry Consensus, and Research Base

External practice supports the TIO view of Strategy, but TIO should not simply copy any external framework. The useful pattern is to use established practice as evidence and translate it into plain executive action.

External anchor	What it confirms	TIO translation
Strategy as choice: Roger Martin's **Strategic Choices Cascade**	Modern strategy practice emphasizes choices, trade-offs, where to play, how to win, required capabilities, and management systems.	Strategy must be an Enterprise Choice Set, not a broad aspiration list.
Balanced Scorecard	A strategy needs more than financial measures. Leaders need a balanced view of the business to understand drivers of performance.	The Strategy Scorecard must include financial, customer, operations, people, risk, trust, capability, and value dimensions.
OKRs and goal systems	Objectives and measurable results can help connect strategy to execution when used with discipline.	OKRs can support the Strategy Activation Map, but they should not replace strategic choices.
Benefits realization	Value should be identified, aligned to strategy, tracked during delivery, and sustained after implementation.	TIO uses value hypotheses, baselines, Evidence Gates, and quarterly value reviews.
COSO ERM and ISO 31000	Risk should be connected to strategy and performance, not handled as a late compliance step.	Strategy must identify what risk posture the organization is willing to carry and what must be protected.
NIST AI RMF and ISO/IEC 42001	AI needs governance, risk management, accountability, transparency, monitoring, and continuous improvement.	Strategy must set AI Value Priorities and pass AI risk and governance requirements into the relevant TIO capabilities.
ISO 56002 innovation management	Innovation should be managed as a repeatable system that supports intended outcomes and continual improvement.	Strategy should guide which innovation and AI opportunities enter Factory, instead of treating all ideas as equal.
Recent AI adoption research	Many organizations are using AI widely, but scaled value depends on workflow redesign, leadership ownership, measurement, and operating changes.	TIO treats AI transformation as enterprise transformation, not technology deployment.

What the industry seems to agree on

- AI adoption is no longer rare. The hard part is moving from use and pilots to measurable enterprise value.
- Value comes when AI is connected to priority workflows, redesigned work, data readiness, governance, risk, adoption, and measurement.
- Boards and executive teams need a clear view of strategy, value, risk, and workforce impact, not only tool deployment updates.
- Technology alone cannot carry the change. Leadership, operating model, incentives, work redesign, skills, and trust matter.
- Risk management and governance must enable safe speed. If controls arrive too late, risk grows. If controls are too heavy, useful work stalls.
- Measurement must begin before launch. Value claims made after the fact are weak.

What TIO adopts, simplifies, and rejects

TIO stance	What this means for Strategy
Adopts	Choice discipline, scorecards, benefits realization, risk integration, AI management discipline, strategy-to-execution routines, and evidence-based adaptation.
Simplifies	Complex strategy language becomes three outputs: Enterprise Choice Set, Strategy Scorecard, Strategy Activation Map.
Rejects	AI strategy as a side document, strategy decks without resource choices, governance theatre, KPI overload, vendor-led transformation, and pilots without baselines or decision points.

16 Vendor and Service Provider Landscape

Vendors can support the Strategy capability. They cannot own it. A platform can track goals, portfolios, dependencies, resources, and measures. It cannot decide where the organization is going, what must be protected, or which trade-offs leaders are willing to make.

Category	What it can help with	Example providers or tools as of July 2026
Strategy advisory and transformation support	Mandate, strategic choices, operating model, leadership alignment, board framing, transformation design, AI strategy integration.	McKinsey, BCG, Bain, Deloitte, Accenture, PwC, EY, KPMG, Gartner, Forrester, boutique strategy and transformation firms, like The Summit Leadership Alliance (TSLA), authors of TIO framework and system.
Strategy execution and OKR platforms	Objectives, key results, alignment, reviews, transparency, strategy execution rhythm.	WorkBoardAI, Cascade, Betterworks, Perdoo, Profit.co, Mooncamp, Weekdone, Quantive legacy assets now associated with WorkBoard.
Strategic portfolio management	Portfolio priorities, funding, capacity, resource trade-offs, scenario planning, benefits tracking, executive visibility.	Planview, ServiceNow Strategic Portfolio Management, Atlassian Jira Align, Planisware, Adobe Workfront, Smartsheet.
Financial planning and resource modeling	Funding scenarios, capacity, capital allocation, operating plans, workforce planning.	Anaplan, Workday Adaptive Planning, Oracle EPM, SAP Analytics Cloud, Board, Pigment.
Analytics and performance dashboards	Scorecards, executive dashboards, evidence views, performance analysis.	Microsoft Power BI, Tableau, Qlik, ThoughtSpot, Looker, Sigma.
Risk, governance, and compliance tools	Risk registers, control evidence, policy workflow, auditability, risk dashboards.	ServiceNow GRC, Archer, MetricStream, OneTrust, Diligent, AuditBoard.

When tools help

- The organization already has clear choices, owners, measures, and a review rhythm.
- Leadership needs one source of truth for priorities, resources, portfolio decisions, and value evidence.
- The organization is large or distributed enough that spreadsheets and slide decks are hiding dependencies.
- The tool will reduce reporting burden and improve decisions, not create another reporting burden.

When tools are premature

- Leaders have not made trade-offs.
- The organization has not named accountable owners.
- Measures are unclear or too numerous.
- AI Use Cases are not tied to strategic value hypotheses.
- The leadership rhythm does not yet produce decisions.
- The organization believes buying the platform will create the Strategy capability.

Selection criteria

- Can the tool represent choices, not only tasks?
- Can it connect strategy to funding, capacity, owners, measures, dependencies, and value evidence?
- Can it support quarterly reviews and decision logs without excessive administration?
- Can it integrate with existing project, portfolio, financial, data, and collaboration systems?
- Can executives, managers, and practitioners actually use it?
- Can it support risk, privacy, security, and vendor governance requirements?
- Does it make work simpler or just more visible?

17 What TSLA Can Help With

TIO is open source, developed and owned by The Summit Leadership Alliance (TSLA). Leaders can use the model directly. TSLA helps organizations apply it safely, practically, and faster by providing thought-partnership, facilitation, assessment, leadership activation, AI fluency, strategy-to-execution design, and implementation support.

Strategy need	TSLA support	Typical output
Mandate and ambition	CEO, owner, board, or executive Thought-Partnership; mandate conversation; Executive TIO Briefing.	Mandate notes, Enterprise Ambition, Transformation Mandate.
Strategic choices	Strategic Choices Cascade facilitation, leadership alignment, AI-aware strategy discussion.	Enterprise Choice Set.
Scorecard and value	Balanced Scorecard design, AI Value Priority workshop, value logic, benefits thinking.	Strategy Scorecard, initial value measures, first baselines.
Capability connection	TIO Maturity Assessment, target maturity facilitation, capability priority setting.	Priority capability targets, maturity gap view, first moves.
Activation	ALA for leader activation, SATA for team activation, manager cascade design.	Strategy Activation Map, leader priorities, team priority maps.
Governance and portfolio link	Steering rhythm, decision rights table, Evidence Gate design, portfolio filter.	Decision rights, AI Use Case selection criteria, quarterly review cadence.
Communication and change	Communications Strategy and Plan, Change Story, Workforce Commitment, manager pack.	Plain-language strategy message and change support.
Sustainment	Quarterly review, thought-partnership retainer, course correction.	Quarterly strategy review pack, decision log, refreshed priorities.

The TSLA role should be to help the organization build the **internal capability**. The goal is not dependency. The goal is to help leaders create a strategy system they can keep using after the first engagement ends.

18 Common Failure Modes

Strategy failures are usually visible before they are admitted. A strong guide should help leaders recognize them early:

Failure mode	What it sounds like	Recovery move
Tool-first strategy	We need an AI strategy. Which platform should we buy?	Return to enterprise ambition and work under strain before choosing tools.
Everything is a priority	All of these initiatives are important.	Force a short priority set and a visible stop/defer list.
Deck without decisions	The strategy is approved.	Ask what will be funded, stopped, measured, owned, and reviewed differently.
AI side strategy	Here is the enterprise strategy, and here is the AI strategy.	Fold AI, automation, data, and technology into the enterprise choices.
Scorecard overload	We track 80 KPIs.	Reduce to measures that guide decisions and show strategic progress.
No owner	Someone should move this forward.	Name an accountable owner for each priority and decision.
Unfunded ambition	We agree, but people are already overloaded.	Connect priorities to money, capacity, calendars, and incentives.
Strategy does not travel	The executive team understands it.	Activate managers and teams; test whether they can explain what changes for their work.
Quarterly theater	We review progress every quarter.	Turn reviews into decision meetings with evidence, stop/scale decisions, and adaptation.
Vendor-led transformation	The vendor says this is the future.	Use the vendor as input, not as the strategy owner.
Risk as a late blocker	Risk needs to review this before launch.	Define risk posture and escalation rules during strategy and design.
Pilots without baselines	It seems to be working.	Require baseline, value hypothesis, Evidence Gate, and decision point.

19 Real-World Examples

Example 1: Owner-led business

A 35-person service business wants to use AI but the owner is already the bottleneck. Employees are using public AI tools for emails and social posts. The owner is curious but worried about confidentiality and reputation.

The Strategy capability begins with the Owner Mandate. The owner decides the business will use AI first to reduce administrative load and improve customer communication, not to replace customer judgment or pricing decisions. The owner creates a simple scorecard: quote turnaround time, customer response quality, admin hours saved, and no confidential information in public AI tools. The first AI Use Case becomes a safe customer email drafting workflow with human review.

The value is not a grand transformation. It is a repeatable owner-led pattern: choose one problem, protect trust, test safely, measure what changed, and decide what happens next.

Example 2: Mid-sized enterprise

A 600-person company wants growth but has too many urgent initiatives. Sales, operations, finance, and technology all have AI ideas. Managers are already overloaded. The CEO wants speed but does not want a transformation bureaucracy.

The leadership team uses the Strategic Choices Cascade to decide where the organization will focus growth, which customer segments matter most, and which operating capabilities must improve. The team chooses three strategic priorities, creates a Strategy Scorecard, names owners, and filters the AI Use Case backlog through those priorities. Several exciting ideas are deferred because they do not support the strategy or are not ready.

In the quarterly review, one onboarding automation use case shows cycle-time improvement and clear user adoption. Another reporting initiative is redesigned because the data ownership gap is larger than expected. Strategy matures because evidence changes decisions.

Example 3: Large enterprise

A large enterprise has many AI pilots but no clear value story for the board. Functions are moving at different speeds. Risk review is inconsistent. The board wants to know what value is being created and what exposure is growing.

The Strategy capability creates an Enterprise Choice Set, AI Value Priorities, and an Enterprise Scorecard. The leadership team narrows the enterprise AI portfolio to a smaller number of priority workflows and requires baseline, owner, risk screen, data readiness, and Evidence Gate for each. Technology and Data readiness actions are named before scale. Managers receive a cascade pack so they can explain what is changing and why.

The board update changes from a list of pilots to a strategy, value, risk, workforce, and next-decision view. The enterprise moves from activity to discipline.

Example 4: Failure pattern

A company launches an enterprise AI assistant because the demo is impressive. Adoption is high at first. Six months later, value is unclear, data leakage concerns appear, managers do not know how to guide use, and functions disagree about whether the tool should be expanded.

The failure was not only technical. Strategy was absent. The organization did not define what work the assistant should improve, what information it could use, who owned the value case, how leaders would measure success, or what trust commitments would be made to the workforce. The recovery path is to stop treating deployment as strategy, define the use cases that matter, create a scorecard, clarify safe-use boundaries, and move priority work through the Factory.

20 Expert Checklist and Monday Morning Moves

A reader who understands the Strategy capability should be able to test it quickly. Use this checklist before a strategy refresh, AI portfolio review, board update, or transformation kickoff.

Expert question	What it tests
Can we define the strategy in plain language?	Clarity.
Can leaders name the choices and non-choices?	Trade-off discipline.
Can managers explain what the strategy means for their teams?	Translation.
Can we show what is funded, stopped, deferred, or protected?	Resource alignment.
Can we show how AI, automation, data, and technology change the strategy?	AI-aware direction.
Can we name the capabilities that must mature?	Capability-based transformation.
Can we prove value with measures and evidence?	Evidence-driven management.
Can we show how risk and trust are protected?	Responsible speed.
Can we adapt the strategy when evidence changes?	Maturity.

What to do Monday morning

1. Ask the CEO, owner, or enterprise sponsor to state the current strategic choices in one page. If this cannot be done, Strategy is not yet clear enough.
2. Create a list of all current AI, automation, data, technology, and transformation activities. Mark which strategic choice each one supports. Anything unlinked needs review.
3. Identify the top five measures leaders actually use to make decisions. If there are none, start the Strategy Scorecard.
4. Ask each executive to name one thing they will stop, defer, protect, or fund differently because of the strategy.
5. Set the first quarterly strategy review with three agenda items only: evidence, decisions, and adaptation.

Closing thought

Strategy is not the words leaders approve. It is the choices the organization can see in funding, attention, ownership, measures, work redesign, risk posture, and what leaders are willing to stop.

A Strategy Capability Build Questions

These questions can be used in a workshop, executive interview, assessment readout, or quarterly strategy review.

Mandate and ambition

- What is the organization here to do?
- What must it become over the next three to five years?
- What must be protected as the organization changes?
- What pressure makes change necessary now?
- What would happen if nothing changed?

Strategic choices

- Where will we play?
- How will we win?
- What capabilities must we build?
- What will we not pursue?
- What must stop competing for attention?

AI, automation, data, and technology

- Where could AI and automation change the economics, speed, quality, service, risk, or experience of the organization?
- Which workflows matter enough to redesign first?
- What data must be trusted, protected, connected, and usable?
- What technology foundation is required for the strategy?
- Which AI Use Cases are strategic, safe enough to test, and measurable?

People and trust

- What should employees hear early and repeatedly?
- Where will human judgment remain required?
- What skills must leaders, managers, and teams build?
- Which roles may change?
- What workforce commitments are leaders willing to honor under pressure?

Evidence and adaptation

- What baseline will prove whether value changed?
- What are the leading indicators that the strategy is working?
- What will trigger a stop, scale, redesign, or defer decision?
- What assumptions need to be reviewed every quarter?
- Who maintains the decision log?

B Source Notes and Research Base

This guide uses the TIO canon as its primary source and uses external research and standards as supporting anchors. External sources should not take over TIO. They should help validate and sharpen TIO practice.

Source area	How it informed this guide
TIO internal canon	TIO Framework Document v1.0 FINAL, July 2026. Establishes TIO as an enterprise-first, AI-aware, capability-based, evidence-driven, scale-fit transformation system.
TIO Leadership master	TIO Leadership Capability Domain Master v0.3 DRAFT, July 2026. Defines Strategy, Fluency, Governance, Risk, and Transformation; includes Strategy definition, behaviors, outputs, evidence, measures, maturity model, owners, and TSLA connections.
TIO implementation guides	Owner-Led, Managed, Mid-Sized, Large, and Large Distributed Enterprise Implementation Guides v1.0 FINAL, July 2026. Provide scale-fit first 12-month paths and operating reality patterns.
Strategy as choice	Roger L. Martin and A.G. Lafley, Playing to Win: How Strategy Really Works, 2013; Roger Martin strategy materials. Used as an anchor for the idea that strategy is a set of integrated choices.
Balanced Scorecard	Robert S. Kaplan and David P. Norton, The Balanced Scorecard: Measures that Drive Performance, Harvard Business Review, 1992. Used as an anchor for balanced, decision-useful strategy measures.
OKRs	IBM and What Matters resources on Objectives and Key Results. Used as an anchor for connecting objectives to measurable results when applied with discipline.
Benefits realization	Project Management Institute, Benefits Realization Management: A Practice Guide. Used as an anchor for linking strategy to value identification, measurement, and sustainment.
Enterprise risk and strategy	COSO Enterprise Risk Management - Integrating with Strategy and Performance; ISO 31000 Risk Management. Used as anchors for linking risk, strategy, performance, and governance.
AI risk and management systems	NIST AI Risk Management Framework 1.0; ISO/IEC 42001:2023 Artificial Intelligence Management System. Used as anchors for AI governance, risk management, monitoring, accountability, and continual improvement.
Innovation management	ISO 56002:2019 Innovation Management System. Used as an anchor for treating innovation as a repeatable system connected to intended outcomes.

Source area	How it informed this guide
AI adoption and value research	McKinsey State of AI 2025, BCG AI Radar 2025, Deloitte State of Generative AI in the Enterprise, Stanford AI Index 2025. Used as anchors for the gap between AI adoption and scaled value, and for the importance of workflow redesign, governance, leadership, and measurement.
Vendor landscape	Official product pages and market materials from WorkBoardAI, Cascade, Planview, ServiceNow Strategic Portfolio Management, Atlassian Jira Align, Adobe Workfront, Smartsheet, and related strategy execution, OKR, and portfolio management providers, reviewed July 2026.