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Connect the Dots:

Linking Agile Strategy to Execution

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change
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Agenda

1. Background
2. CUE Method
3. ASE Maturity and Framework
4. The Role of Culture in Strategy Planning
5. Exercise & Wrap Up
Learn the definition, myths & requirements of Agile Strategy Execution

Assess agile strategy improvements using the CUE Model

Measure agile maturity using the Agile Strategy Maturity Model (ASEM)

Understand obstacles to strategic execution based on prior research

Discuss the connection between strategy and execution for agile programs, projects and tactics

Demonstrate a new Agile Strategy Execution Framework and tools

Discuss how this model will connect the dots between your strategy needs and execution
I work with or in:

1. A department to help execute their strategy
2. A company to help execute their strategy
3. Other depts. helping with cross dept. communication and coordination
4. Work with a dept./company in project or portfolio management
5. All of the above
6. None of the above
Finding Your True North

Related to company culture
Assets, know-how, strengths
Customers you serve (or want to serve)
Market, trends, developments
What words describe you?
Your business?
The Goal: Value

Sustainable shortest lead time
Best quality and value (to people & society)
Delight the customer
Based on principles of “Kaizen” = change for the good
The Goal: Value

Sustainable shortest lead time. Best quality and value (to people and society). Most customer delight, lowest cost, high morale, safety.

**Pillar 1: Respect for People**
- don’t trouble your customer
- develop people-then build products
- no wasteful work
- teams and individuals evolve their own practices and improvements
- build partners with stable relationships, trust and coaching lean thinking
- develop teams

**Development Practices**
- long-term great engineers
- mentoring mgr-eng-teachers
- cadence
- cross-functional
- team room + visual mgmt
- entrepreneurial chief product manager
- set based concurrent dev.
- create more knowledge

**Pillar 2: Continuous Improvement**
- Go See
- kaizen
- spread knowledge
- small, relentless,
- retrospectives
- 5 whys
- eyes for waste variability, overburden, NVA, handoff, WIP, info scatter delay, multitasking, defects, wishful thinking...
- perfection challenge
- Work to flow (smaller batch sizes, low cycle time)

**14 Lean Principles**
Long-term philosophy, flow, pull, level workload, stop and fix, master norms, visual controls, tested tech, leaders-teachers from within, develop exceptional people, help partners be lean, go see, consensus and action, learning/reflection/kaizen

**Foundation: Management Support**
Management applies and teaches lean thinking, and bases decisions on this long-term philosophy

Larman and Vodde (2000)
Adopted by Leffingwell, LLC. (2006)
Embrace Lean-Agile Values

House of Lean

VALUE

Respect for people and culture
Flow
Innovation
Relentless improvement

LEADERSHIP

Agile Manifesto

Individuals and interactions over processes and tools

Working software over comprehensive documentation

Customer collaboration over contract negotiation

Responding to change over following a plan
Throughput

- Rate which inventory generates money through sales, not just production.

Inventory

- Money invested in goods the firm intends to sell.

Operating Expense

- Includes all money the firm spends converting inventory into throughput.
Agile Goals

Value

Time to Value

Cost of Value
Lean + Agile + Kaizen =

Organization as a flow ....
<table>
<thead>
<tr>
<th>Lean</th>
<th>Agile</th>
<th>Kaizen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduce Waste</td>
<td>Increase Value</td>
<td>Continual Waste Reduction</td>
</tr>
<tr>
<td>Quality Products</td>
<td>Working Software</td>
<td>Continuous Improvement</td>
</tr>
<tr>
<td>Shortened Lead Time</td>
<td>Improve Speed to Delivery</td>
<td>Value Stream Mapping</td>
</tr>
<tr>
<td>Continuous Improvement</td>
<td>Learning Organization</td>
<td>Kaizen Organization</td>
</tr>
<tr>
<td>Build a Kaizen Culture</td>
<td>Collaborative Culture</td>
<td>Kaizen Culture</td>
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</table>
Optimizing Activities using the CUE Model

Consolidate Activities

Use Lean Metrics that Matter

Eliminate Waste

Culture

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What is Strategy Execution?

“..a term used to describe the activities within an organisation to manage the execution of a strategic plan”. Wikipedia

“A systematic way of exposing reality and acting on it.”

**Execution** Bossidy & Charan
“We have an awesome strategic plan....so why can’t our people just execute it?”

Is any execution plan easy?

How hard is it to plan to go on a diet?

How hard is it to execute that plan?

How about executing a strategic plan for an entire organization?

Do organizations/society reward executing strategy?
We’ve basically unplugged anything that was annual. … in the digital age, sitting down once a year to do anything is weird, it’s just bizarre. So whether it’s doing business reviews or strategic planning, it’s in a much more continuous way”

Jeff Immelt, Chairman & CEO, GE

Gallup 2013*

41% of employees “feel they know what their company stands for and what makes its brand different from its competitors.” Non-managers, the figure is only 37%!

70% report that they are either “not engaged” or “actively disengaged” about their job

*State of the American Workplace research” (>3000 randomly selected workers)

Strategic planning needs to keep up with the times… it needs to be replaced with top to bottom strategic thinking & agility.
A plan of action or policy designed to achieve a major or overall aim. Wikipedia

“A systematic way of exposing reality and acting on it.”
Execution Bossidy & Charan

Translating strategy into a reality that is aligned, accountable & responsive” Leeds, 2012
Principles of Agile Strategy Execution (ASE)

- **Aligned**: Strategies (goals/initiatives/tactics) are linked & coordinated. Process to align org/dept. plans vertically & horizontally. Tactics/projects aligned & cascaded from linked objectives.

- **Accountable**: Data & outcome driven team buy-in & ownership. Progress to plan is regularly measured & reported. Metric variances lead to real-time discussion/refinement of dept. plans, budgets & actions.

- **Responsive**: Ongoing adaptation/realignment to the changing landscape. Cross-dept. objectives, actions & metrics managed real time. Variances lead to ongoing plan & activity discussion/refinement.
ASM analyzes the gap between CURRENT & DESIRED maturity, identifying specific improvement opportunities in the strategy execution process.
## ASM: Maturity Gap

### 1 Year Plan: Current Vs. Desired Maturity

<table>
<thead>
<tr>
<th>Maturity</th>
<th>Creation</th>
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<th>Accountable</th>
<th>Responsive</th>
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<td>Managed</td>
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<tr>
<td>Task</td>
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SAFe: Enterprise Portfolio

“Strategic themes are specific, itemized business objectives that connect a SAFe Portfolio to the evolving enterprise business strategy”

1. Can lean & agile principles apply to strategy execution?
2. What would be a framework to make this happen?
Agile Strategy Execution: Framework

- Refresh/Transform
- Strategic Plan
- Detailed Plans & Metrics
- Culture
- Retropectives
- Sprint Decisions
- Real-time Updates
- Cascade, Align & Link
- Governance

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1. Detail Plans & Metrics

**Definition:** A systematic approach translating organizational goals, objectives & strategies into area initiatives, tactics & metrics

**Methods:**

- Hoshin Kanri: Hoshin Planning, Policy Deployment
  - Focus on the few breakthrough business goals and objectives
- OGSM: Objectives, Goals, Strategies and Metrics
- OKR: Objectives and Key results - Intel, Google
  - Communicate priorities, maintain alignment and make it stick
- Balanced Scorecard: Performance measurement framework
## Plan Templates: Examples

### Review Table

<table>
<thead>
<tr>
<th>Review Date:</th>
<th>By:</th>
<th>Hoshin Objective:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Strategy or Tactic (Plan)</th>
<th>Goal (Plan)</th>
<th>Actual Performance (Do)</th>
<th>Made</th>
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<th>Root Cause of Deviation (Check)</th>
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<td>Specific steps that have been, or will be, taken to deal with every goal that has been missed.</td>
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Department Plan: Example

- **Primary Link**: A. Consumer Products Strategy 2014: John Lively
  - Financial
    - a1. Reduce Overall Expenses by 25%
    - a2. Revenue for organization
  - Customer

- **Secondary Link**: B. 5 Key Result Areas 2013 (Secondary Link)
  - 14 Key Results
    - b1. Customer Satisfaction
    - b2. Revenue Growth

---

**Objective, Initiative & Actions**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Initiative</th>
<th>Status</th>
<th>Date Due</th>
<th>Owner</th>
<th>Progress</th>
<th>Exec Comments</th>
<th>Hyperlink</th>
<th>Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Financial area</td>
<td>1.1 Reduce costs of all major product lines by 15%</td>
<td>✔</td>
<td>12/31/2014</td>
<td>Susan Rutherford</td>
<td>✔</td>
<td>Please review GP report</td>
<td>Program progress</td>
<td>✔</td>
</tr>
<tr>
<td>Internal</td>
<td>1.1 Define usage of each product line for the past year for AI</td>
<td>✔</td>
<td>09/30/2014</td>
<td>Krishna Ramasamy</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1 Ensure 20% of revenue is from new product releases</td>
<td>✔</td>
<td>12/31/2014</td>
<td>Stan Rhodes</td>
<td>✔</td>
<td>Should exceed</td>
<td>Increase yearly goal</td>
<td>New release schedule</td>
<td></td>
</tr>
</tbody>
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**Outcomes:**
- Transparency: Single Source of Truth: (SSOT)
- Communication: strategic goals drive progress & actions at all org. levels
- SMART: Specific, Measurable, Achievable, Results focused, Time bound
- Metrics: tied to critical objectives: measured & reviewed real-time
- Employee involvement: targets, improvement schedules & reviews
2. Cascade, Align & Link

**Definition:** Ensure that strategic goals, strategies & operating plans are cascaded, aligned & linked, vertically & cross-functionally, driving progress/actions at all organization levels.

**Methods:**
- Relevancy assessment
- Primary cascade: connecting organization to department plans
- Secondary Cascades: cross-functional collaboration Levers
- Catch-ball engagement: to drive progress and actions
Traditional Strategy Cascade

Company

A  Company Performance

B C  Goals & Objectives

flow to...
## Strategy Cascade: Example

<table>
<thead>
<tr>
<th>OBJECTIVES, INITIATIVES &amp; ACTIONS</th>
<th>AREA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Financial</td>
<td>Consumer Products</td>
</tr>
<tr>
<td>1.1 Gross profit</td>
<td>Consumer Products</td>
</tr>
<tr>
<td>1.2 Margins</td>
<td>Consumer Products</td>
</tr>
<tr>
<td>1.3 Reduce Overall Expenses by 25%</td>
<td>Consumer Products</td>
</tr>
<tr>
<td>1.3.1 Financial Cost Analysis Project</td>
<td>Finance</td>
</tr>
<tr>
<td>1.3.2 Reduce costs of all major product lines by 15%</td>
<td>Operations</td>
</tr>
<tr>
<td>1.3.2.1 Big Sandy Project</td>
<td>Manufacturing</td>
</tr>
</tbody>
</table>
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**Methods:**
- Relevancy assessment
- Primary cascade: connecting organization to department plans
- Secondary Cascades: cross-functional collaboration Levers
- Catch-ball engagement: to drive progress and actions

**Outcomes:**
- Common language and taxonomy
- Line of sight aligning resources, objectives, metrics, initiatives and projects
- Universally applied organizing concepts by channel, geography, functions
- Horizontal & vertical feedback/collaboration loops
- Identification of unsupported initiatives

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3. Real-time Updates

**Definition:** Enable a digital, transparent ‘single source of truth’ for all reporting & drive real-time updates based on day to day ‘triggers’, ensuring properly prioritized & scheduled work.

**Methods:**
- Digital Single Source Of Truth (SOST): strategy through projects & tactics
- Metrics variance analysis
- Structured prioritization processes
- Issues Escalation process
“Our performance on OKRs this quarter was poor. As of today, 9 PMs still have NOT posted their Q4 OKRs on moma (out of 582)” ....... The offenders are listed below……”

“For now, I recommend we all torture the offenders below by asking them in the halls, why the heck they are late on their OKRs?....”

Source: John Doerr on OKRs and Goal setting at Google Jul 30,2014
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**Methods:**
- Digital Single Source Of Truth (SOST): strategy through projects & tactics
- Metrics variance analysis
- Structured prioritization processes
- Issues Escalation process

**Outcomes:**
- Improved decision making quality and reduced cycle time
- SSOT with open access to all stakeholders
- Org., dept., team & personalized collaboration/ reporting Initiatives, tactics & projects: doing the right things right
- Strengthened organizational agility and responsiveness
4. Sprint Decisions

**Definition**: Ensure real-time resourcing & course correcting solutions to manage prioritization & the backlog decision making processes.

**Methods**:
- Share & analyze team sprint performances to date (including linked items)
- Identify issues, develop action plans for to get back on track/change direction
- Identify & prioritize items for next set of sprint items (initiatives/epics)
- Reprioritize backlog re. “Stop Keep Start” (SKS) as needed
## Sprint Decisions: Example

### Objectives, Initiatives & Actions

<table>
<thead>
<tr>
<th>Objectives, Initiatives &amp; Actions</th>
<th>Area</th>
<th>Current Quarter</th>
<th>Due Date</th>
<th>Owner</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Financial</td>
<td>Consumer Products</td>
<td></td>
<td>12/31/2014</td>
<td>Matt Gardner</td>
<td></td>
</tr>
<tr>
<td>1.1 Gross profit</td>
<td>Consumer Products</td>
<td></td>
<td>12/31/2014</td>
<td>John Lively</td>
<td></td>
</tr>
<tr>
<td>1.2 Margins</td>
<td>Consumer Products</td>
<td></td>
<td>12/31/2014</td>
<td>Paul R.</td>
<td></td>
</tr>
<tr>
<td>1.3 Reduce Overall Expenses by 25%</td>
<td>Consumer Products</td>
<td></td>
<td>12/31/2014</td>
<td>Steve</td>
<td></td>
</tr>
<tr>
<td>1.3.1 Financial Cost Analysis Project</td>
<td>Finance</td>
<td></td>
<td>12/31/2014</td>
<td>Jim Carroll</td>
<td></td>
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<tr>
<td>1.3.2 Reduce costs of all major product lines by 15%</td>
<td>Operations</td>
<td></td>
<td>12/31/2014</td>
<td>Susan Rutherford</td>
<td></td>
</tr>
<tr>
<td>1.3.2.1 Big Sandy Project</td>
<td>Manufacturing</td>
<td></td>
<td>5/14/2014</td>
<td>Laurie Bacopoulos</td>
<td></td>
</tr>
</tbody>
</table>

### EPIC

<table>
<thead>
<tr>
<th>EPIC</th>
<th>Status</th>
<th>% Complete</th>
<th>Owner</th>
<th>Start</th>
<th>Planned End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define</td>
<td>✔</td>
<td></td>
<td>Laurie Bacopoulos</td>
<td>2/5/2014</td>
<td>3/5/2014</td>
</tr>
<tr>
<td>Measure</td>
<td>✔</td>
<td></td>
<td>Laurie Bacopoulos</td>
<td>4/6/2014</td>
<td>5/6/2014</td>
</tr>
</tbody>
</table>

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4. Sprint Decisions

**Definition:** Ensure real-time resourcing & course correcting solutions to manage prioritization & the backlog decision making processes.

**Methods:**
- Share & analyze team sprint performances to date (including linked items)
- Identify issues, develop action plans for to get back on track/change direction
- Identify & prioritize items for next set of sprint items (initiatives/epics)
- Reprioritize backlog re. "Stop Keep Start" (SKS) as needed

**Outcomes**
- Objectives/initiatives broken into manageable components (epics/stories)
- Work completed & delivered on schedule
- Analysis and learnings from 'wins' and 'losses'.
- Institutionalize prioritization/backlog processes: integral to organizational culture & governance
5. Retrospectives

**Definition:** Formal assessment and re-evaluation of existing and emerging strategy-execution efforts and priorities. Re-assess and refine next quarter’s objective/initiative and tactic priorities, timeframes and backlog.

**Methods:**
- Assess current “deliberate” strategy performance: metrics trends, objectives, initiatives status, trends & budgets
- Define “market watch” opportunities: based on market trends
- Develop opportunity plans: based on agile strategic systems thinking
- Initiate deep dives: small/big bets to address potential gaps/opportunities
Retrospectives: Meeting Questions

How are we doing on our “deliberate” strategies and objectives?
How have our strategic objectives been performing over the past quarter?
What are the implications for our team?

Are there “emerging strategies” we need to consider (Market Watch)?
Are there any emerging trends with customers, competitors or market?
What impact could/should they have on our strategies and objectives?
Should we add/refine/change anything in our “deliberate” strategies or objectives?

Is our business model correct?
Is our customer and business strategy having the impact we expect/want?
Is it driving the results we expect it to, or do we need to make changes?
What “deep dives” should we consider? Are they big or small bets?

How are our budgets and rolling quarterly financial variances looking?
Are there changes we need to make to our budgets?
Are there refinements we need to make on our initiative backlog?
Are there new skills/expertise we need to consider?
Are there refinements we need to make to our initiative timing?
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**Methods:**

Assess current “deliberate” strategy performance: metrics trends, objectives, initiatives status, trends & budgets

Define “market watch” opportunities: based on market trends

Develop opportunity plans: based on agile strategic systems thinking

Initiate deep dives: small/big bets to address potential gaps/opportunities

**Outcomes:**

Assessment of current strategy/objective performance

Organization focus on agile initiative refinement and ongoing innovation

Re-prioritization of current & emerging strategies for initiation and backlog

Process & environment for agile innovation & strategy-to-execution re-alignment
6. Refresh/Transform

**Definition:** Formal, periodic reassessment of all core business assumptions, & where needed, update/revise strategic, operating plans, priorities, linkages & alignment

**Methods:**
- Outside-In Strategic Forces Assessments
- Global Analysis: SWOT and TSPE Trends
- Market & Competitor Analysis: Quality Function Deployment (QFD)
6. Refresh/Transform: Tools

Competitive Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Internal origins:
- Helpful
- Harmful

External origins:
- Helpful
- Harmful
6. Refresh/Transform

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**Methods:**
- Outside-In Strategic Forces Assessments
- Global Analysis: SWOT and TSPE Trends
- Market & Competitor Analysis: Quality Function Deployment (QFD)

**Outcomes:**
- Improved decision making cycle time with agile course corrections for strategic big bets
- Forces review & reassessment of value propositions for key priorities across the organization based on updated trends
- Improved strategy investment ROI & ‘Time to Value’ assessment
Incorporate a systematic & disciplined approach focusing on translating breakthrough objectives into specific functional 'Area' plans & metrics.

Ensure that strategic goals are cascaded & aligned both vertically & cross-functionally, driving progress/actions at all organization levels.

Drive real-time plan updates based on day to day ‘triggers’, ensuring properly prioritized & scheduled work.

Ensure appropriate resourcing & course correcting solutions to manage prioritization and backlog.

Update strategies real-time and reassess operating priorities predominately based on variances in our performance or metrics.

Assess core business assumptions, updating or revising strategic & operating plans, linkages & alignment as needed.
What Drives Culture?

CULTURE = "How we do things around here to succeed."

"We succeed by working together."
Affiliation, Synergy, Partnership, Interaction, Teams, Egalitarian

"We succeed by growing people who fulfill our vision."
Purpose/Faith, Dedication, Let things Evolve, Subjectivity, Creativity

REALITY (ACTUALITY)
"We succeed by getting and keeping control."
Power, Security, Standardization, Hierarchical, Stability, Orders

CONTROL
Predictability, Process

COMPETENCE
Efficiency, Meritocracy, Craftsmanship, Expertise, Creativity

COMPANY (IMPERSPERSONAL)
"We succeed by being the best."
Professionalism, Achievement, Be the Best

PEOPLE (PERSONAL)
"We succeed by growing people who fulfill our vision."
Purpose/Faith, Dedication, Let things Evolve, Subjectivity, Creativity

CULTIVATION

POSSIBILITY (ORIENTED)

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What Drives Culture?

Adapted from “The Heart of Change Field Guide”, Dan Cohen
Changing Culture Aligns Business and IT

- Strategic Change Management (Business)
- IT Change Management

Organization Change Management (People Side)

- Organization Level
- Group Level
- Individual Level
‘Culture eats strategy for breakfast’
- Peter Drucker
Strategy Execution has been around a long time….time for a change

We can adopt “Agile” best practices ...with refined frameworks, methods & tools

A top driven culture is needed for Agile Strategy Execution: it is everyone’s job

‘Strategy without Execution is Hallucination‘ …adopted from Thomas Edison

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Questions?
Your Task (individually or small group):

1. “Oval” the **current maturity** of your **organization** in **RED**
2. “Oval” the **desired maturity** of your **organization in 1 year** in **GREEN**
3. Indicate the **#1 priority** for your organization for this year

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ASM: Evaluation
### Plan Templates

**Review Table**

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**OKRs Scorecard**

**Objective 0.6**

Accelerate Widget revenue growth

**Key Results**

1.0 Launch new Widget referral program

0.5 Sign up 3 new Widget distribution partners

0.5 Launch 4 revenue-specific experiments to learn what drives revenue growth

**Objective 0.8**

Improve Widget’s public reputation

**Key Results**

0.6 Speak at 3 Industry events

0.9 Get 10 bloggers to write about Widget

0.8 Improve Widget's product review score by 1 point

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**Strategic Focus Area: Increase Shareholder Value**

<table>
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<th>Perspectives</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financials</strong></td>
<td>Revenue Growth of 20% by 2014</td>
</tr>
<tr>
<td><strong>Customers</strong></td>
<td>Acquire More Customers</td>
</tr>
<tr>
<td><strong>“Internal” Processes</strong></td>
<td>Customer Marketing &amp; Service Program</td>
</tr>
<tr>
<td><strong>Learning &amp; Growth</strong></td>
<td>Develop Support Systems &amp; Personnel</td>
</tr>
</tbody>
</table>

**ReadySetEat OGSM (simplified)**

- **Goal**: What do you want to achieve?
- **Strategy**: How much?
- **Measures**: How will we know when we get there?
- **Tactics**: What tools will we use to employ the strategy?
- **Opportunities**: Drive incremental sales of ConAgra Foods brands
- **Goals**: Drive XXX% lift in incremental sales of ConAgra Foods products
- **Tactics**: By providing users with quick and easy dinner ideas to solve the weeknight dinner dilemma.
- **Opportunities**: Drive XXX visits to recipe pages
- **Measures**: SEM, Content Discovery and Pinterest

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6. Refresh/Transform: Tools

Global Analysis

- What’s hot & what’s not
- Global vs Region short & long term
- Consumer & business perspectives
- Government & regulatory trends

Customer & Partner Listening & Impression Capture

Market & Competitor Analysis

- Global Analysis
- What’s hot & what’s not
- Global vs Region short & long term
- Consumer & business perspectives
- Government & regulatory trends

Competitive Analysis

- SWOT
  - Strengths
  - Weaknesses
  - Opportunities
  - Threats

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## Agile Strategy Maturity Model (ASM)

ASM analyzes the gap between **CURRENT** & **DESERVED** maturity, identifying specific improvement opportunities in the strategy execution process.

<table>
<thead>
<tr>
<th></th>
<th>Creation</th>
<th>Aligned</th>
<th>Accountable</th>
<th>Responsive</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Optimized</strong></td>
<td>Ongoing real-time assessment &amp; refinement of org./area strategies based on internal &amp; external factors</td>
<td>Plan refinements trigger org. wide notification/ discussion/corrective actions with all affected areas/owners... real time.</td>
<td>Real time org/area KPI’s visible &amp; acted upon. Metrics variances lead to real-time discussion/refinement for area plans, budgets &amp; actions.</td>
<td>Institutionalized agile strategy execution process in place. Agile processes &amp; culture change embedded in organization.</td>
</tr>
<tr>
<td><strong>Integrated</strong></td>
<td>Integration of org./area: plans, external data &amp; internal performance.</td>
<td>Transparent and real-time coordination between area plans. Cross-area initiatives are coordinated between teams. Tactics/projects aligned &amp; linked to objectives.</td>
<td>Org. &amp; area metrics linked/cascaded to area objectives. Variances reported with real-time actions. Coordinated portfolio-based initiative funding.</td>
<td>Area real time sprint decision making &amp; retrospectives conducted within/between areas. KPI &amp; issue triggers drive plan reassessment &amp; backlog mgmt.</td>
</tr>
<tr>
<td><strong>Task Oriented</strong></td>
<td>Yearly org. plans developed using readily available data. Selected area plans are developed.</td>
<td>Selected area plans and activities aligned and linked to organization plans.</td>
<td>Org metrics &amp; area indicators are quantified/reviewed for selected initiatives/areas. Area key initiative funding.</td>
<td>Selected areas. link objectives to activities with scheduled reviews. Selected objectives/ tactics visibly managed.</td>
</tr>
</tbody>
</table>

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Agile Strategy Execution: Framework

- Refresh/Transform
- Detailed Plans & Metrics
- Culture
- Cascade, Align & Link
- Sprint Decisions
- Real-time Updates
- Governance

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Strategic Planning Process Flow

- **Brain-storming**
  - Asks questions
  - Uncovers facts

- **Situation Analysis**
  - Develops insights
  - Generates alternatives

- **Decision Making**
  - Defines roadmap
  - Promotes effective action

- **What is going on?**
  - Asks questions
  - Uncovers facts

- **What are our options?**
  - Develops insights
  - Generates alternatives

- **What should we do?**
  - Defines roadmap
  - Promotes effective action

Inputs and New Ideas

Updated Plans and Strategies
Retrospectives

Inputs and New Ideas

Brain-storming

Situation Analysis

Decision Making

Updated Plans and Strategies

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