

Presented by  cascade

Strategy Bootcamp

2022

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Strategy Bootcamp

2022

Quick Introduction

Let's warm up a bit!



Jeremy Jarvis

Strategy Execution Director

Jeremy has over seven years of experience in Technology, working in Health as well as the Federal and State Government industry sectors. His experience lies in Salesforce development and transformation, strategy formulation and execution, IT service delivery and process design, UNIX administration, incident management, problem management, change management, technology risk and compliance, technology governance, network design and implementation, penetration testing, network administration and controls.

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Strategy Bootcamp

2022

You're in for a treat today.

Workshop Agenda



01

Formulate effectively



02

Launch with confidence



03

The key to execution



04

Refine on time

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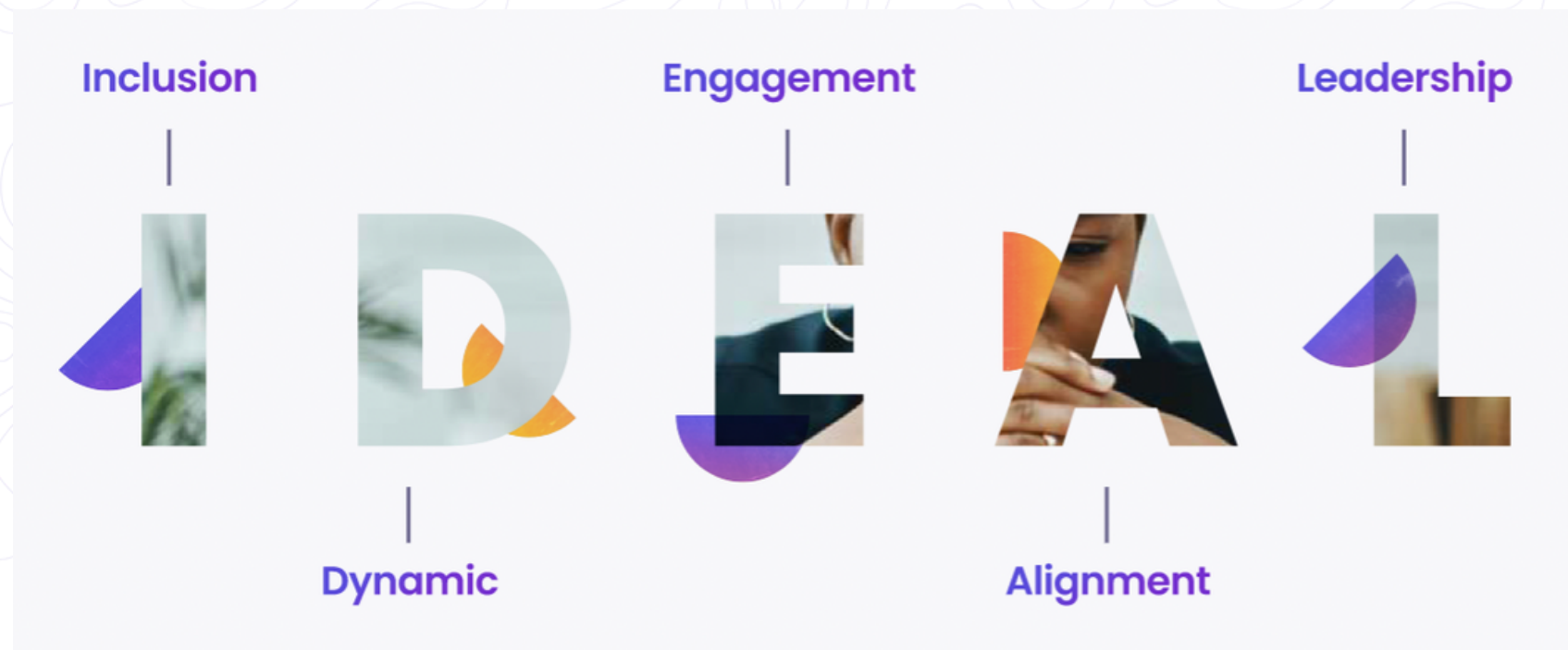
Strategy Bootcamp

2022

Introduction

How will this bootcamp work?

- ✓ 4 x 15 minute bitesize sessions
- ✓ We'll be following the IDEAL methodology found in our Strategy Report
- ✓ Scan the QR code where you see it, or wait for the links to be emailed
- ✓ Follow along with your workbooks
- ✓ Chat with attendees, ask us questions as we go along!



You're doomed or you adapt

Traditional planning
assumes the market
is stable...



Access it now!



You're doomed or you adapt



1 Part One Formulating your strategy

The screenshot displays the Cascade app interface. At the top, a goal titled "Achieve 25% Growth in Asia Pacific by 2023" is marked as "On Track". Below it, several objectives are listed with progress bars and status indicators:

- Reduce wait times for distribution** (On Track): Includes sub-objectives like "Average <5 minute turnaround" (At Risk) and "Objective Eg. Hit our carbon emissions" (On Track).
- Objective Eg. Hit our carbon emissions** (On Track): Includes sub-objectives like "Initiative Eg. Purchase 25 new EV vehicles for Northern fleet" (Behind).

Three circular profile pictures of team members are overlaid on the interface. A quote box from a team member reads: "I want a place where my team can work collectively on our plans and support the company strategy." Below the quote, it says "Every strategic leader ever".

The IDEAL methodology proposes a new *(and improved)* way to strategy execution.

Inclusion

- Rally your entire organization around strategy.
- Collaborate with your teams.
- Ensure everyone's day-to-day work aligns with the top level strategy.

Engagement

- Connect individual goals to business outcomes.
- Empower team members.
- Encourage teams to focus on work that matters.
- Measure individual impact to drive accountability.

Leadership

- Communicate changes without endless meetings and email threads.
- Know what everyone is working on, how it's progressing without having to chase anyone for updates.
- Measure the success of your strategic initiatives in real time.



Dynamic

- Identify risks before it's too late.
- Know if, when and how you should course-correct.
- Adapt to changing priorities without a hassle.
- Easily adapt to changes in business landscapes and priorities.

Alignment

- Always stay aligned and on the same page.
- Align huge cross-functional projects easier.
- Give teams clarity on what they should do, how and why.
- Collaborate with teams to build multiple inter-connected plans.

Download the
Workbook!



Strategy needs to be everyone's business.

Fixing your broken strategy is easier than you think.
The answer is the IDEAL methodology, let's break it down:



Inclusion

Stop

Hiding your strategy in the boardroom.

Start

Bringing everyone together to contribute to the strategy. Everyone knows something about the business that others don't whether it's unique pressures, market insights or customer needs. Collaborate, don't proscribe.

1 Inclusion

Does everyone in your team know the strategy?
Does everyone feel part of the strategy?
Do you value diverse point of views?

People that don't have access to strategy.

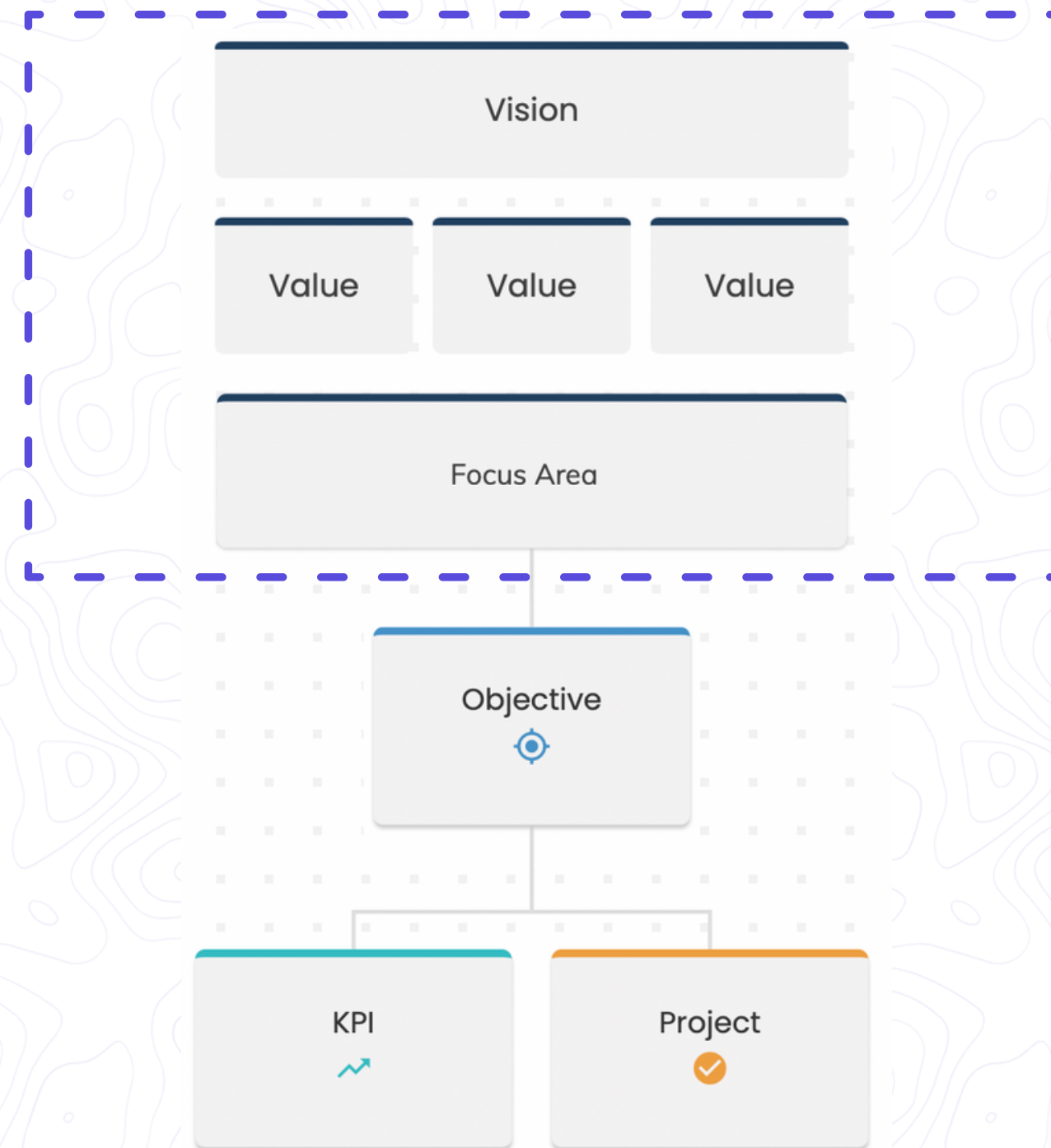


Plan structure & terminology



Strategy model in place

The elements that make up your strategic plan, and the framework that we covered.



Vision/Mission

Every significant action in your organisation going forward will ultimately be contributing towards this.

Values

Values unite your organisation through a tight set of core beliefs that everyone shares & embraces.

Focus Areas

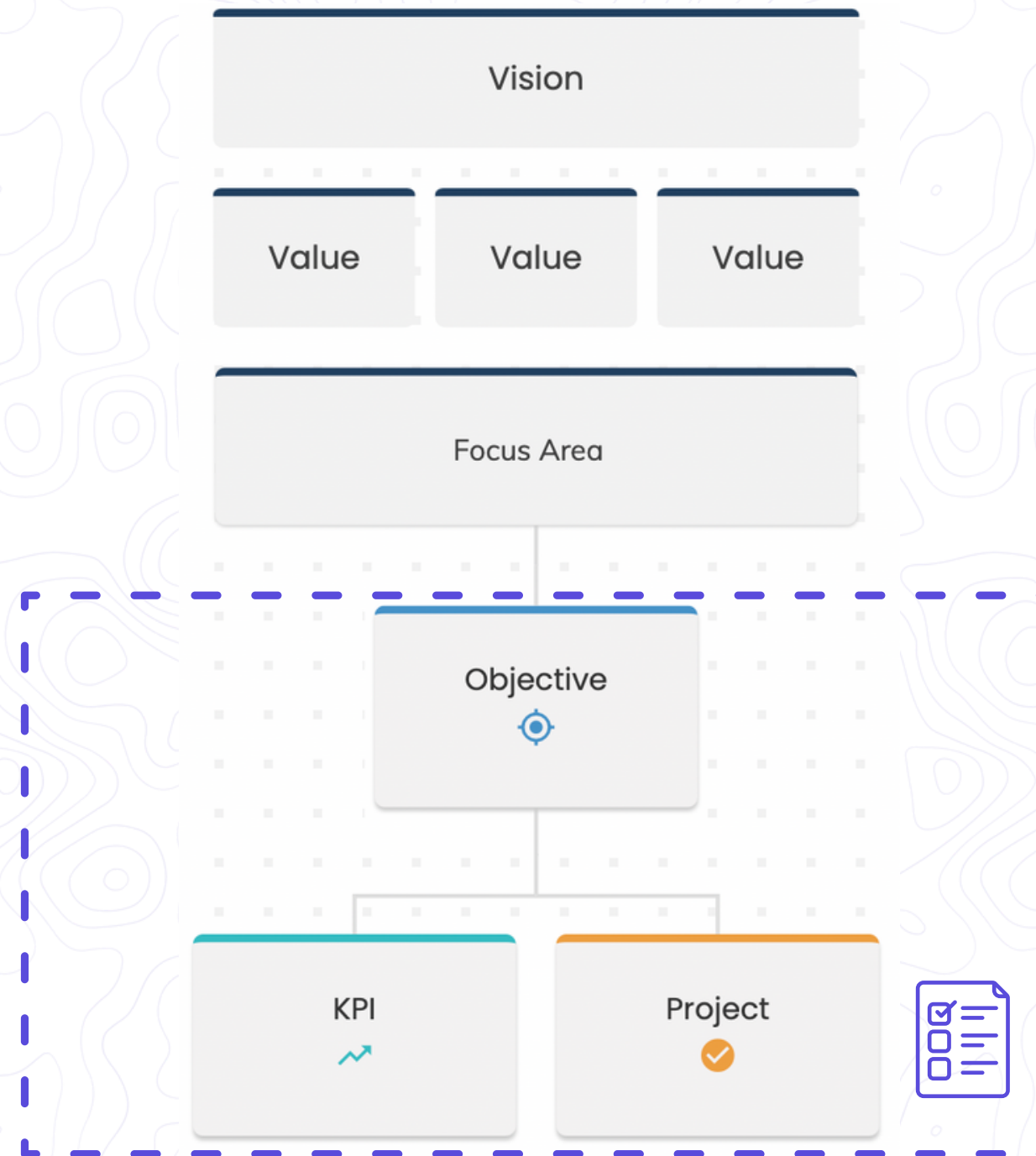
The foundations that categorise your vision. Sometimes known as Pillars or Priorities!

Learn More!



Focusing on Strategy Execution

The elements that make up your strategic plan, and the framework that we are covering today.



Objectives

What you want to achieve as an outcome. More specific than focus areas, as they have a deadline.

Projects & Tasks/ Actions

Specific projects to realise your outcomes. They should have clear owners, start and end dates. They will later be broken down into specific tasks/actions that are either done or not done.

KPIs

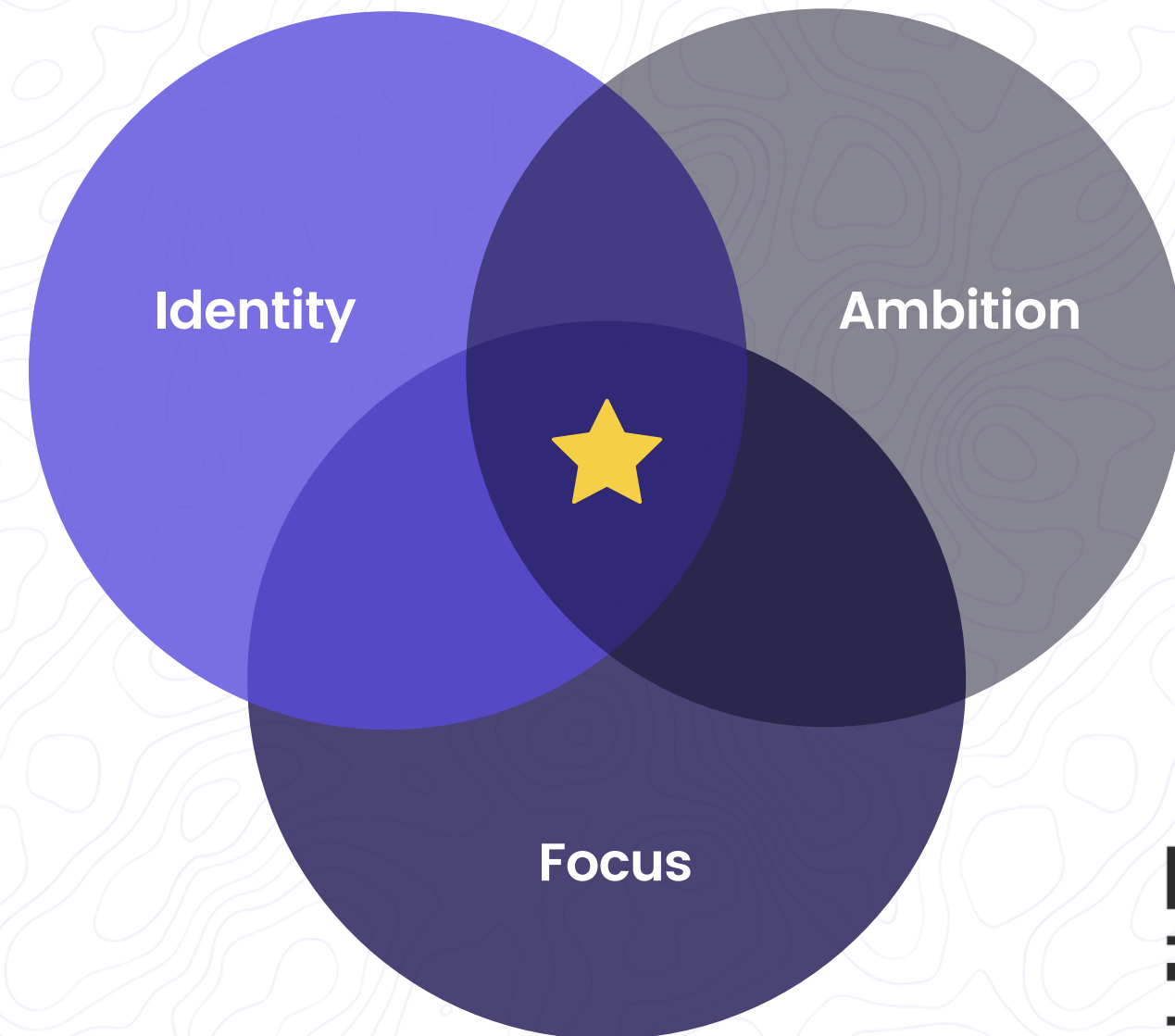
Numerical measures of success to determine whether or not you're meeting your outcomes.

What makes a good Focus Area?

- ✓ Foundation stones of your strategy
- ✓ Expand on your vision with specific categories of effort
- ✓ Easy to remember...for easier FOCUS!
- ✓ No longer than 6 words each
- ✓ Not too broad, no jargon
- ✓ No metrics

Example:

Aggressive Growth



Learn More!

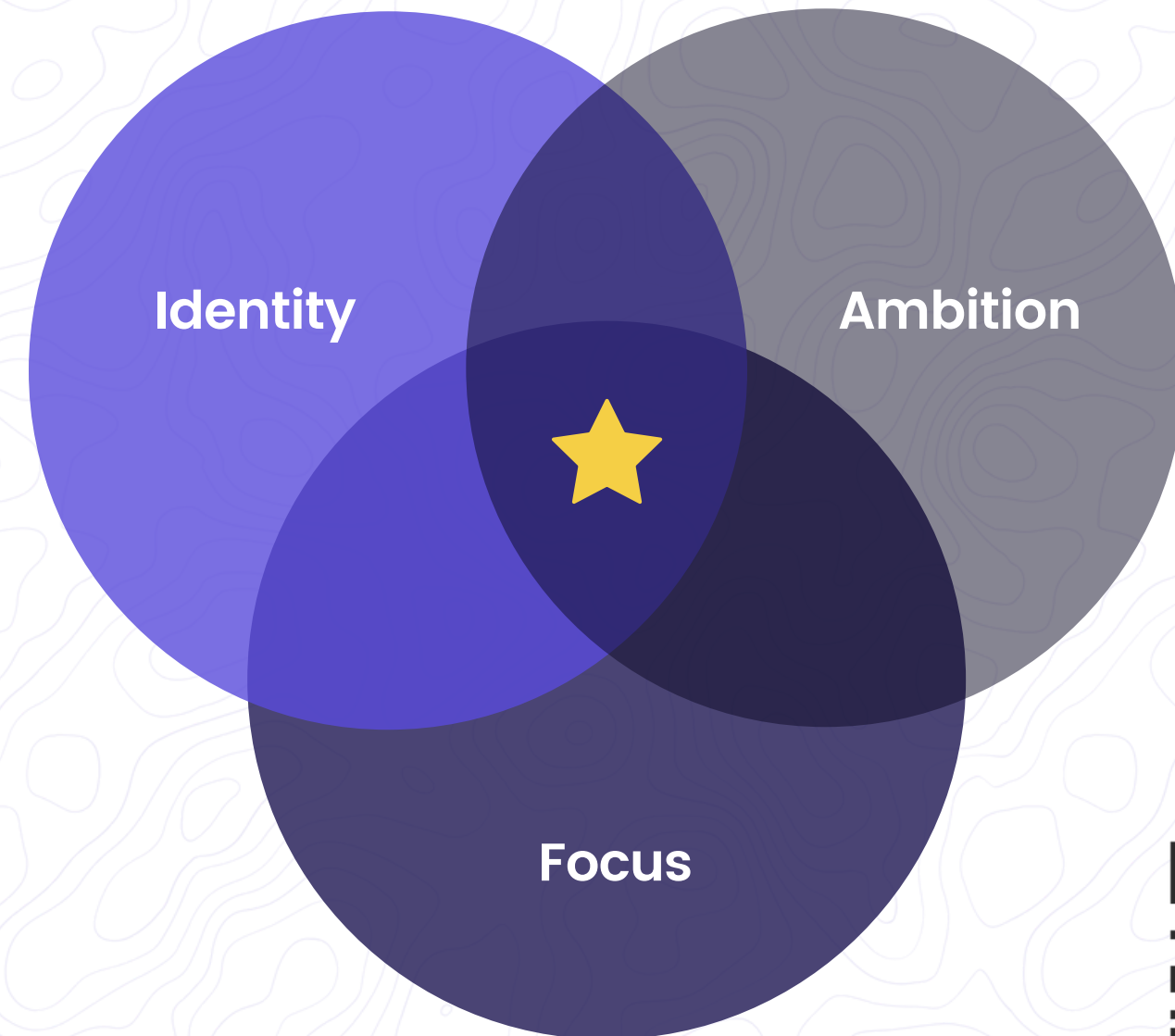


What makes a good Objective?

- ✓ 3-6 high-level statements describing a specific outcome
- ✓ Always has a deadline attached, even if it's just the full year
- ✓ Can be tangibly achieved; linked to org identity
- ✓ Should be attached to your Focus Areas (ideally one each)
- ✓ NO SPECIFIC METRICS (those come later)

Example:

Triple our revenue across key segments by date



Learn More!



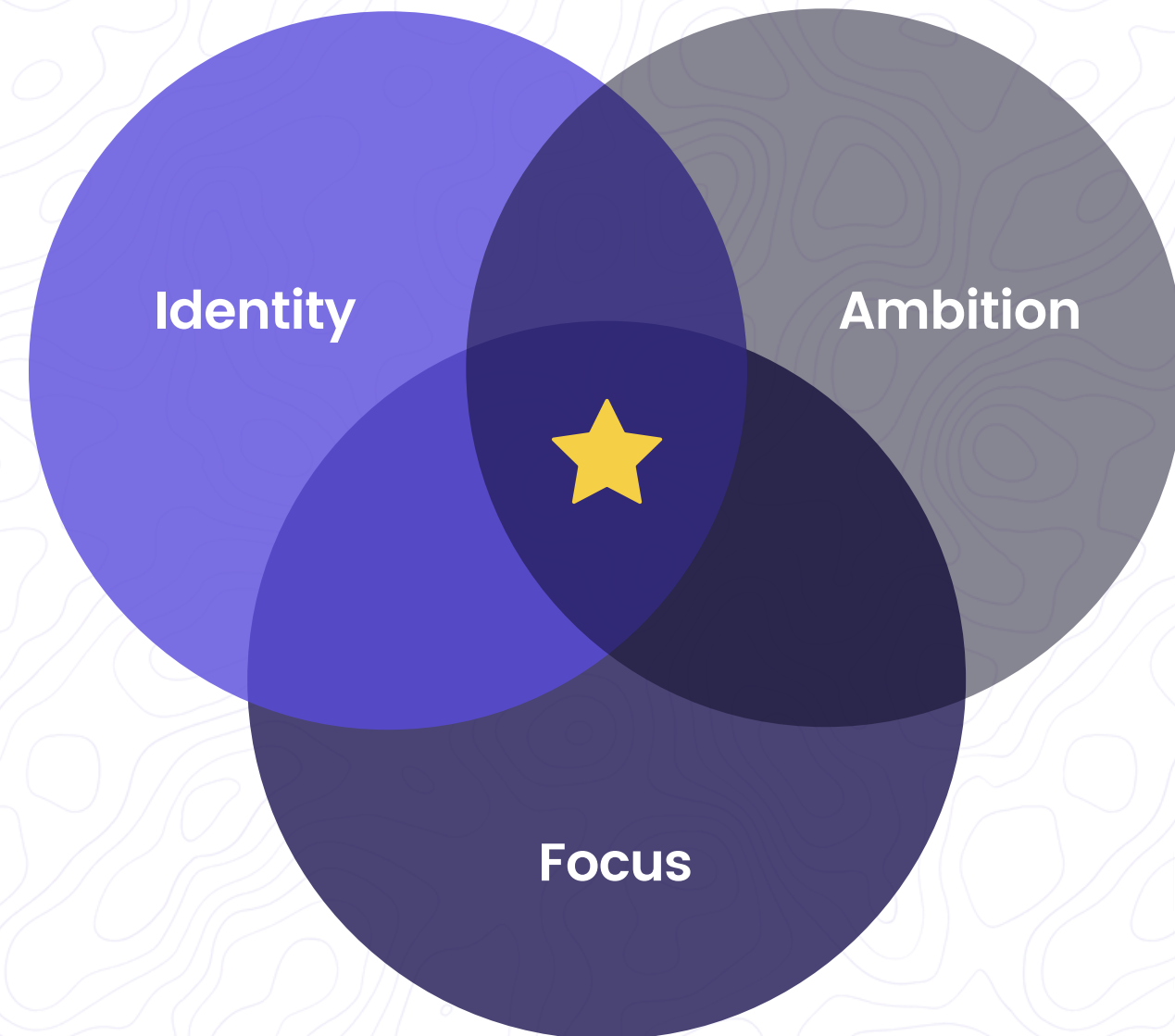
What makes a good Project?

- ✓ What you'll do to achieve your objectives
- ✓ Specific actions you will take to get there
- ✓ Do NOT list operational things ("Keep the lights on" stuff)
- ✓ Can be broken down into sub-projects or tasks/milestones
- ✓ Tasks/Milestones are done or not done - keep it simple

Example:

Create a large-scale marketing campaign by date

- Task: Hire Marketing Manager
- Task: Engage PR company
- Task: Write email copy



Learn More!

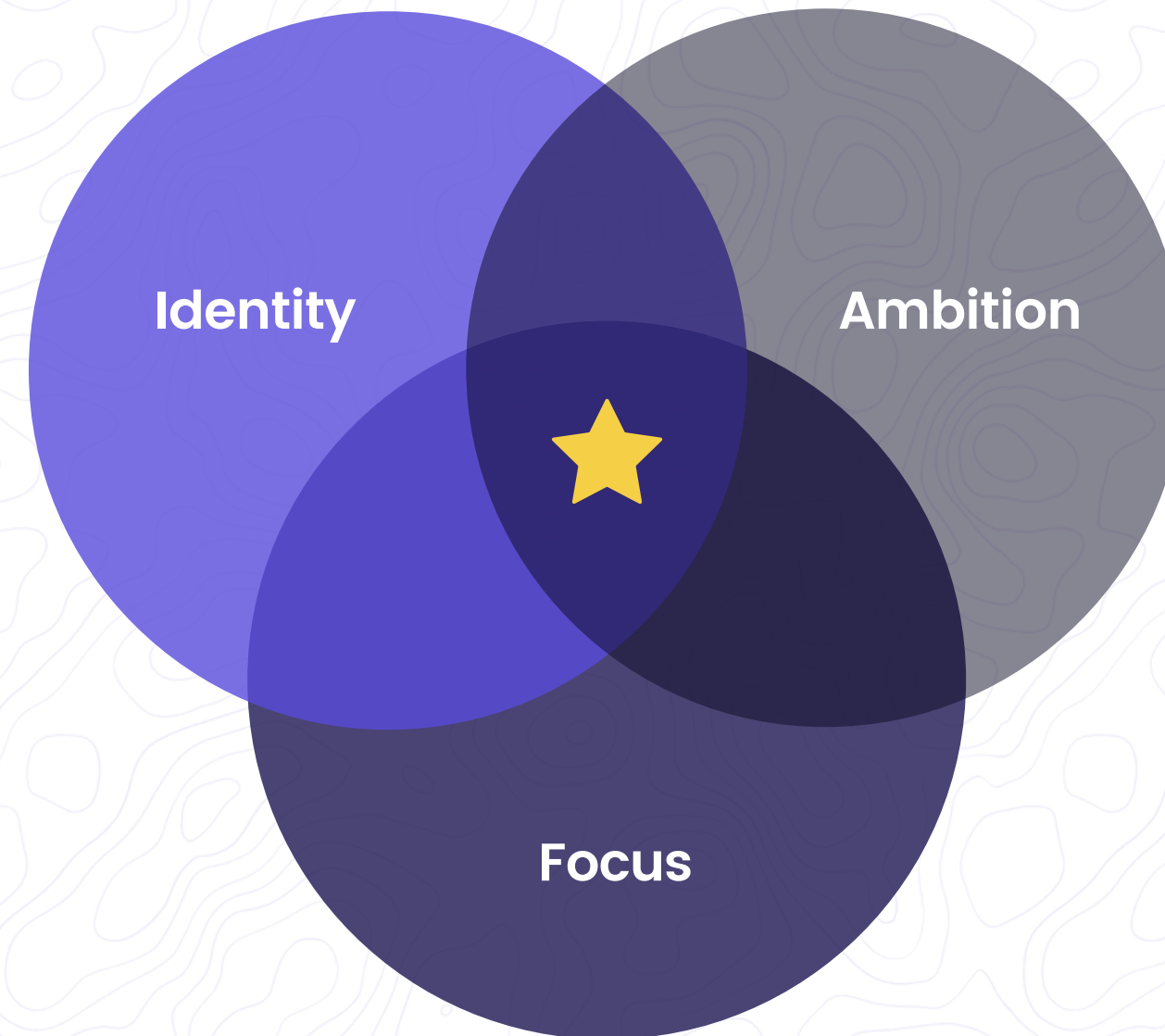


What makes a good **KPI**?

- ✓ ALWAYS QUANTITATIVE, time-bound measure
- ✓ DEFINE SUCCESS for corresponding objectives
- ✓ Together, they act as a scorecard for company health
- ✓ Help to identify when to make adjustments
- ✓ Recognize and analyze patterns/trends
- ✓ Did I mention these need to be measurable?

Example:

Increase revenue to \$65,000,000 by date



Learn More!



Embrace speed and be ready to adapt.

Fixing your broken strategy is easier than you think.
The answer is the IDEAL methodology, let's break it down:

D Dynamic

Stop

Creating grand strategic plans.


Start

Involving everyone in your planning process and you won't be short of ideas. Establish goals and outline a general approach quickly. You can't wait months to refine it all to a perfect plan. Become comfortable knowing that your dynamic plan will change often. Prioritize the best ideas first and start executing quickly! Be open to experimentation and iteration as you progress.

2 Dynamic

*Are you suffering from analysis paralysis?
Is your strategy ready to adapt to change?
Do you value flexibility in your culture?*



Follow me: 

Pia Heidenmark Cook

Senior advisor to Ingka Group/IKEA



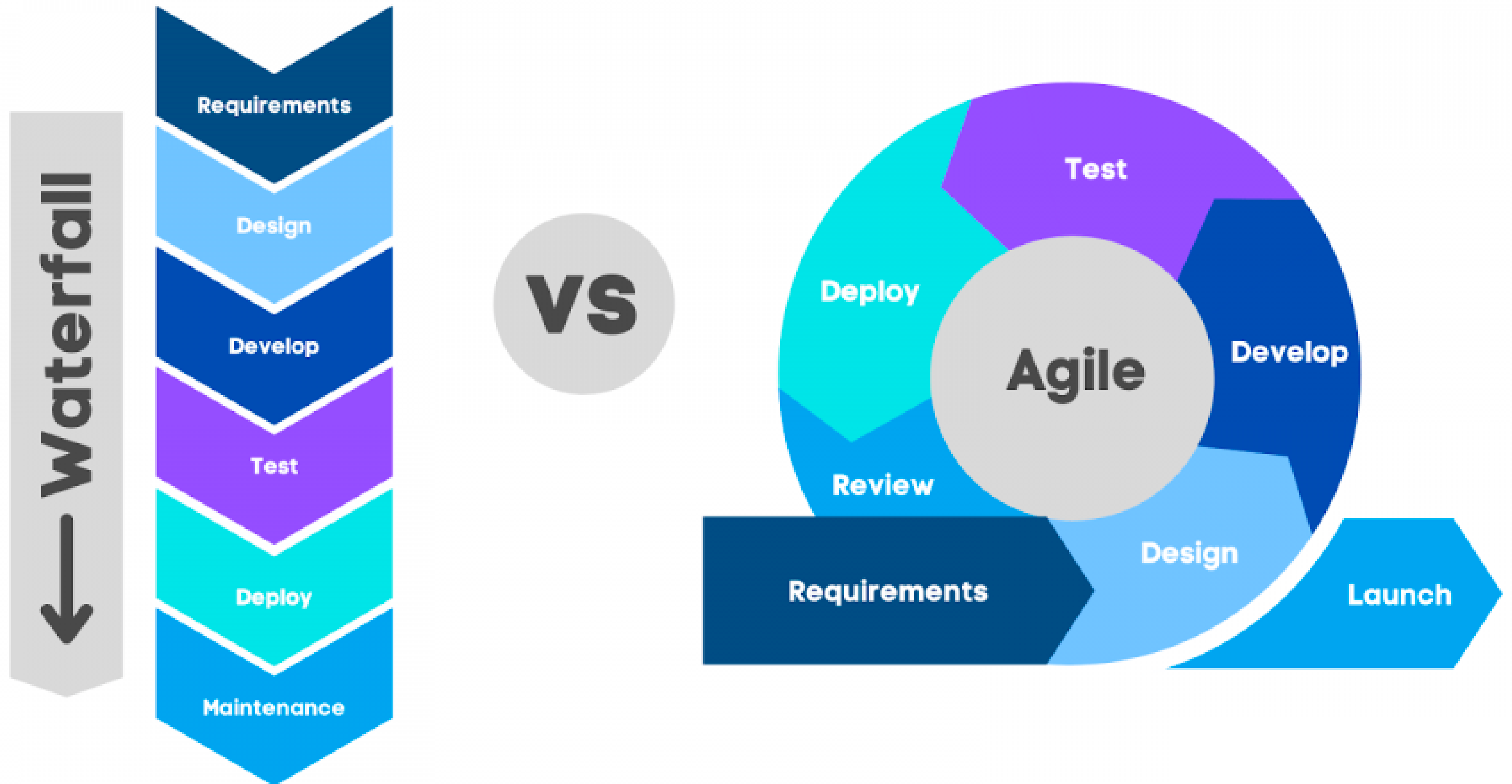
"It's fundamental to know that we learn as we go, because if you're going to sit and make this perfect plan knowing every piece and what will happen, then you'll be paralyzed by perfection. You never know what can happen.

Things change so fast, now you need to write your strategy, agree on your strategy and almost execute it at the same time.

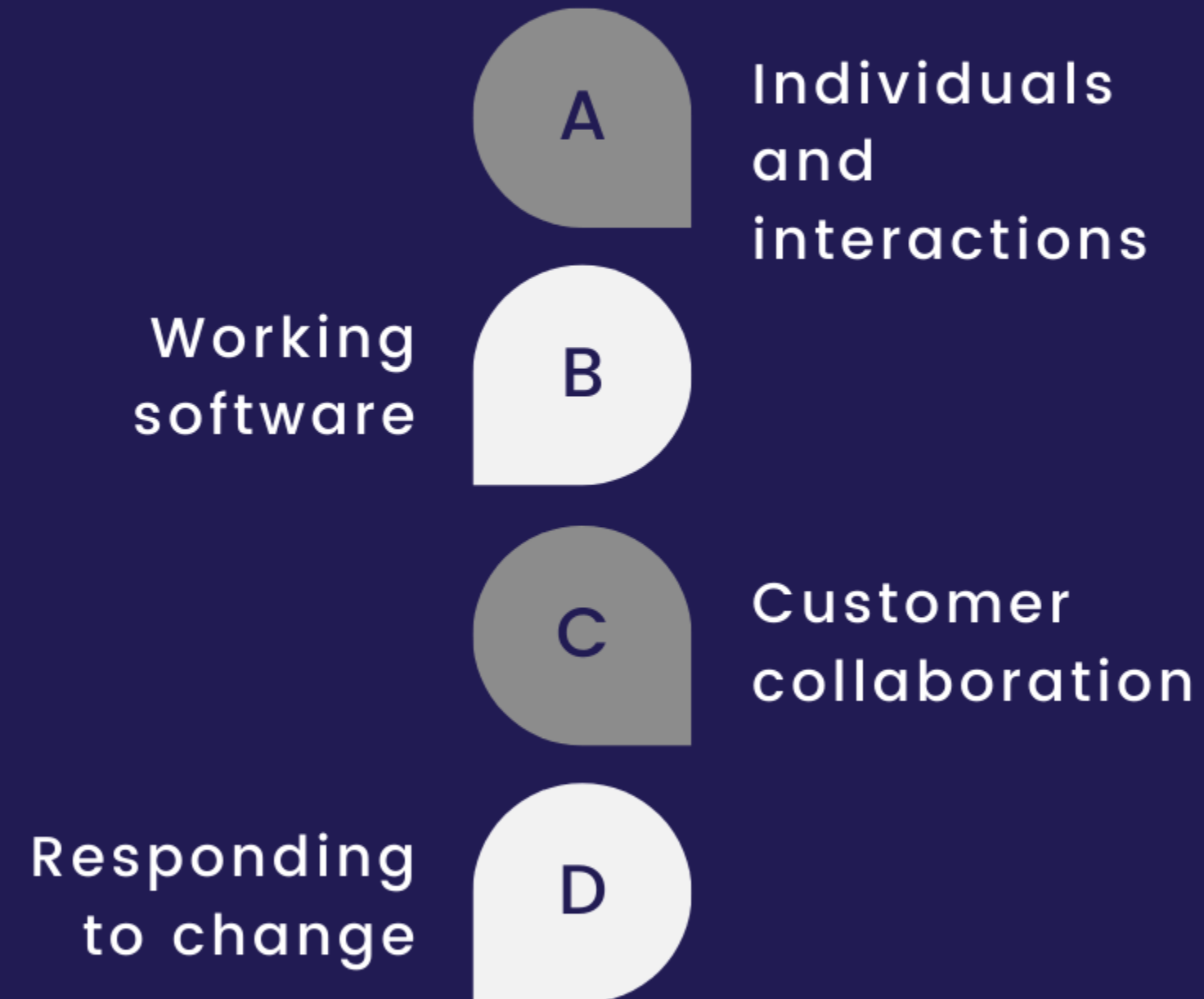
Agile vs waterfall methodologies



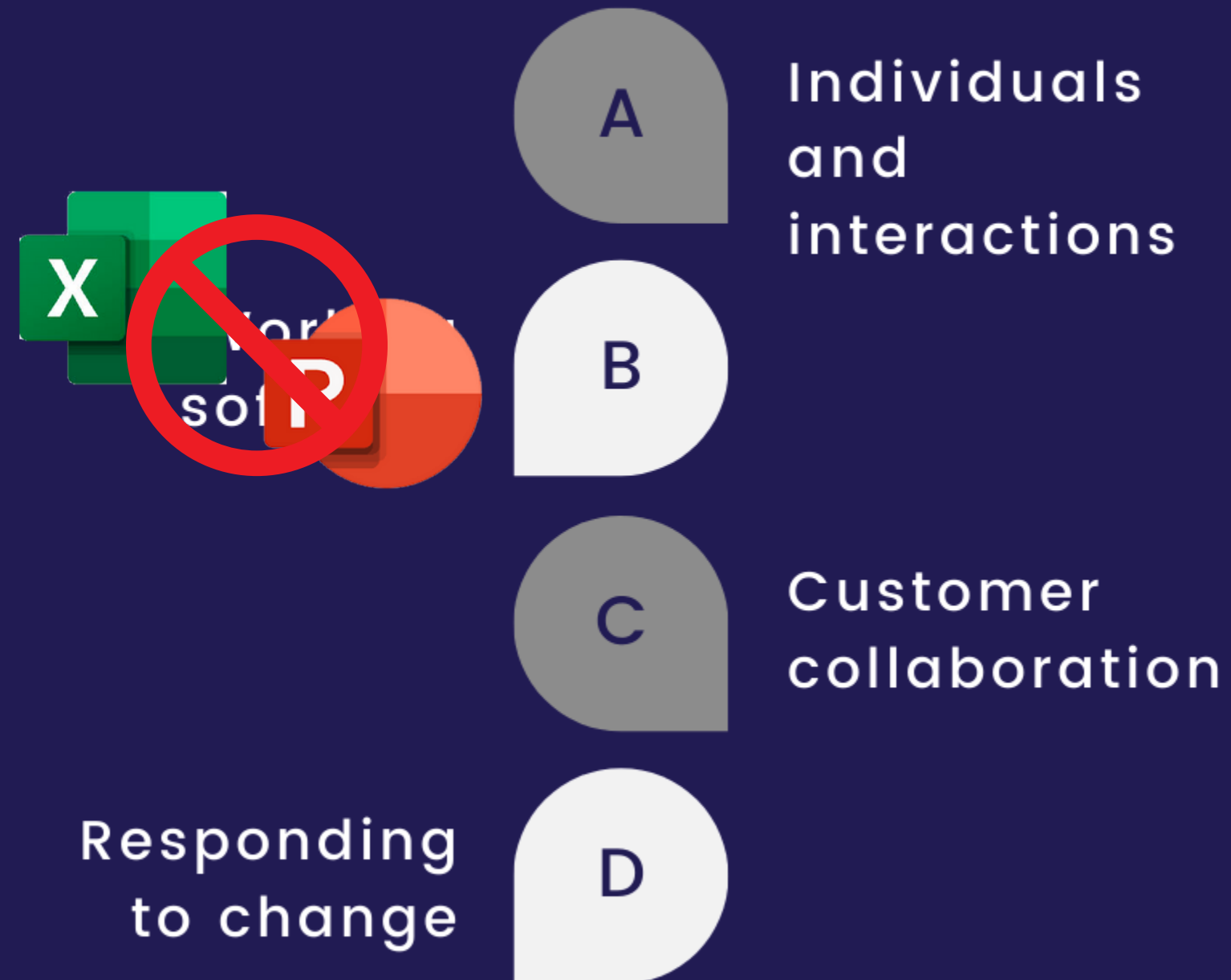
Agile vs Waterfall



4 core values of Agile



4 core values of Agile



Learn More!





Part One: Formulating your strategy

Recap on Part One!

- ✓ It all starts with Inclusion – Ensure everyone in your business knows your strategic priorities and feel part of the journey
- ✓ Involve your people early: get insights and buy-in
- ✓ Use the opportunity to educate – Ensure your teams know the difference between objectives, projects & KPIs
- ✓ Be agile with your planning – Stop making grand plans!

2

Part Two

Launching your strategy

Achieve 25% Growth in Asia Pacific by 2023 On Track

Initiative	Owner	Due Date	Progress	Status
Reduce wait times for distribution	[Avatar]	31 Dec 2021	[Progress Bar]	On Track
Average <5 minute turnaround	[Avatar]	31 Dec 2021	[Progress Bar]	At Risk
[Initiative]	[Avatar]	31 Dec 2021	[Progress Bar]	On Track
[Initiative]	[Avatar]	[Date]	[Progress Bar]	Behind

Objective
Eg. Hit our carbon emissions

Initiative
Eg. Purchase 25 new EV vehicles for Northern fleet

Quote: "I want a place where my team can work collectively on our plans and support the company strategy."
Every strategic leader ever

Everyone should know how they make an impact.

Fixing your broken strategy is easier than you think.
The answer is the IDEAL methodology, let's break it down:

E Engagement

Stop

Pushing your people away from the vision.

Start

Including everyone in the strategy. When you do, something magical happens. They buy-in deeply, and fight for the strategy because it's not just the company strategy, it's their own. Engagement increases enormously and they achieve more than ever before.

3 Engagement

*Does everyone work with the strategy in mind?
Do your teams know how they impact the strategy?
Is ownership clear for every goal/project?*



Follow me:

Guillermo Hermosillo Cue

Global Innovation Director



Organizations that promote a transparency and collective culture when it comes to strategy, generate a stronger commitment and sense of accountability from their employees.

Promoting a strategy-focused culture helps employees stay focused on priorities. A strategy-focused company has higher chances of building a strong culture because employees feel part of the end goal.

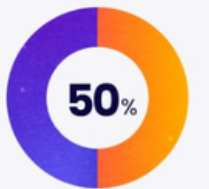
How do you deliver engagement?

- ✓ Continue engaging your people, right from planning. Have members own goals with deadlines.
- ✓ Delegate high level goals to your key stakeholders, and celebrate success!
- ✓ Have functional leaders present their strategy back and help them to ensure that their goals are aligned with those of the company
- ✓ Take the time to launch your strategy – Don't email the PowerPoint to your team. The event should be important!
- ✓ Integrate the strategic plan into your processes, BAU and governance – Don't make strategy feel like an extra responsibility.

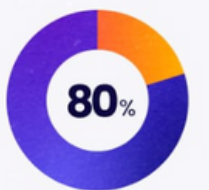
When people are disengaged with strategy they're likely to consider quitting.

● CONSIDER QUITTING ● NOT CONSIDERING QUITTING

“
I don't feel I contribute
to the growth of
the business



“
I don't feel my daily
work fits into the
business strategy



Strategy is a collective effort.

Fixing your broken strategy is easier than you think.
The answer is the IDEAL methodology, let's break it down:

A Alignment

Stop

Isolating your teams and duplicating work.

Start

Sharing ownership of the strategy with you teams. Because everyone is included, and the team is engaged, alignment comes easier and faster than ever. As alignment increases, dynamic iteration skyrockets. Because the alignment comes naturally from shared ownership of the strategy, people are more willing to drive the strategy through its iterations wherever that may go.

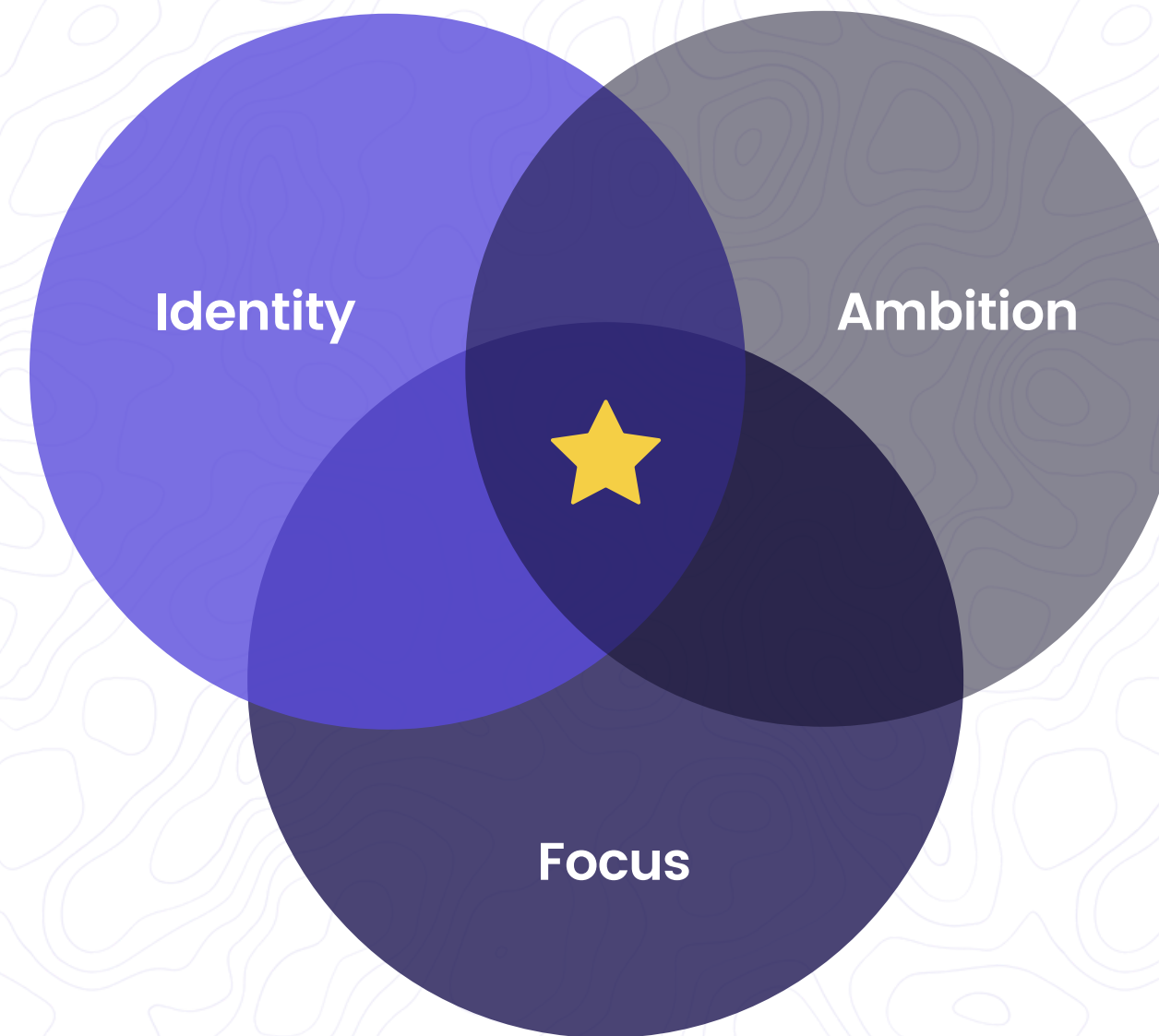


4 Alignment

Does every team know what others are working on?
Do you usually have duplicate work?
Is your cross-department collaboration effective?

What makes good alignment?

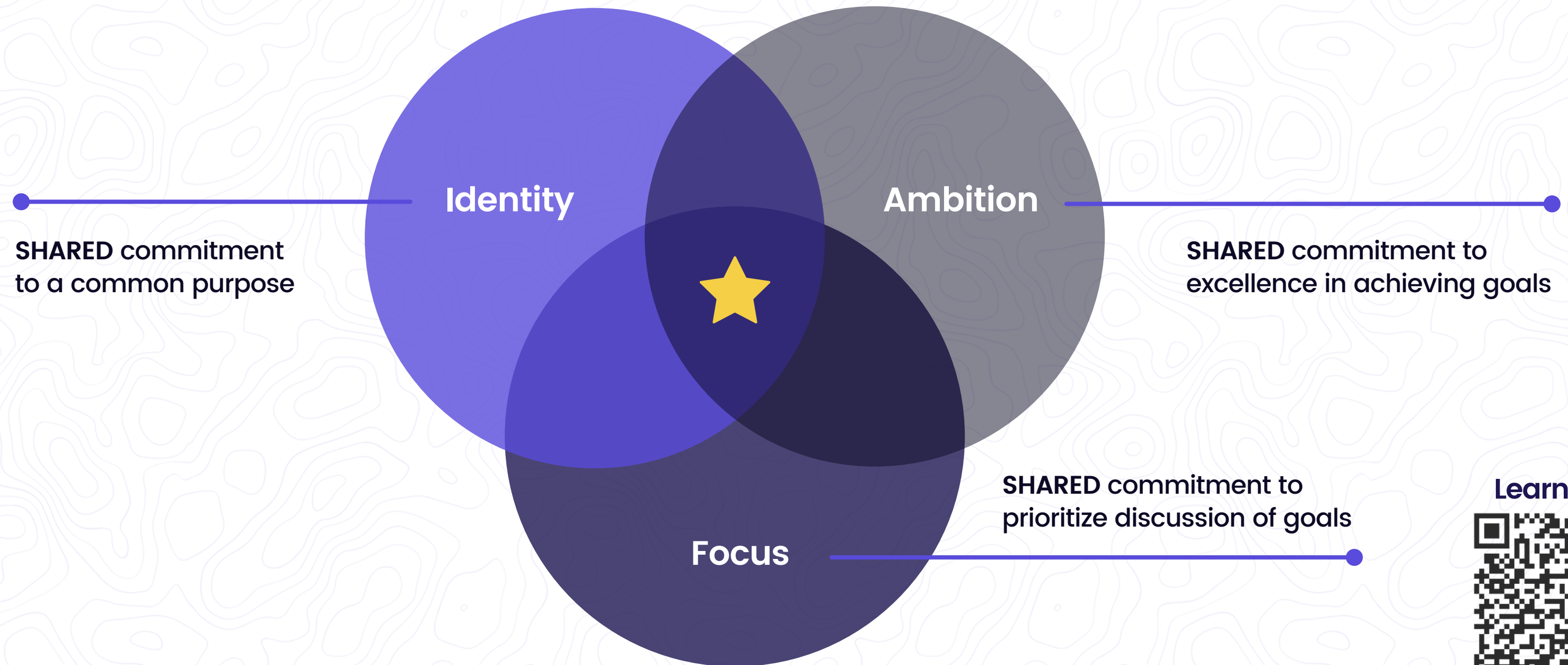
- ✓ Culture of transparency and FOCUS
- ✓ Clear direction and focus from leadership
- ✓ CONSISTENCY in celebrating the good, sharing the bad
- ✓ Clear purpose for EVERY recurring meeting
- ✓ Connecting performance to the strategy
- ✓ COMMITMENT ALL AROUND!



Learn More!



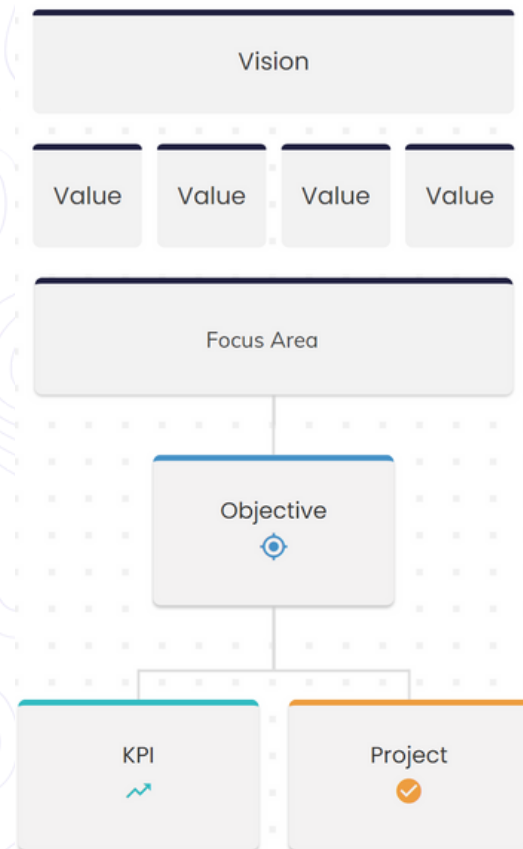
Cultural Alignment



Learn More!



TANGIBLE Alignment



How we fit together



How often we discuss,
and with who



How the review looks,
depending on audience

Define Venues

Meeting	Frequency	Attendees	Purpose
Stand-ups	Daily	Individual teams	Brief chat for escalation, key items happening
Strategy Reviews	Weekly	Departments	Highlight successes, challenges, next steps
Business Reviews	Monthly	Leadership	Gauge strategic direction, consider pivots, financials



Part Two: Launching your strategy

Recap on Part Two!


- ✓ Reduce the time that it takes everyone to get on the same page – Keep your plans visible!
- ✓ Work with team leads to link their individual plans to objectives and measures that are happening in other plans
- ✓ Emphasise ongoing iteration, and demonstrate success with early adopters
- ✓ Lift your people up: Celebrate momentum, address barriers
- ✓ Audit your meetings – Ensure the right people are talking about the right things, at the right time.

3




Part Three


Executing your strategy

Achieve 25% Growth in Asia Pacific by 2023



Reduce wait times for distribution






31 Dec 2021

On Track







Average <5 minute turnaround



31 Dec 2021


At Risk






31 Dec 2021

On Track




Objective

Eg. Hit our carbon t



emissions



Initiative

Eg. Purchase 25 new EV vehicles for Northern fleet

"I want a place where my team can work collectively on our plans and support the company strategy."

Every strategic leader ever

Enable your teams to take ownership.

Fixing your broken strategy is easier than you think.
The answer is the IDEAL methodology, let's break it down:

L

Leadership

Stop

Putting barriers in front of people who want to step up.

Start

Making everyone a leader. Because people are aligned with the strategy, everyone is engaged and people feel deeply included leaving everyone with a real sense of ownership and accountability. Naturally, they step up on behalf of strategy and lead the charge to its success.



5 Leadership

*Does your culture reward people who take leadership?
Do you need to work on your leaders' skills?
Are your employees prepared to be decision-makers?*

Strategy is monopolized by the leaders.

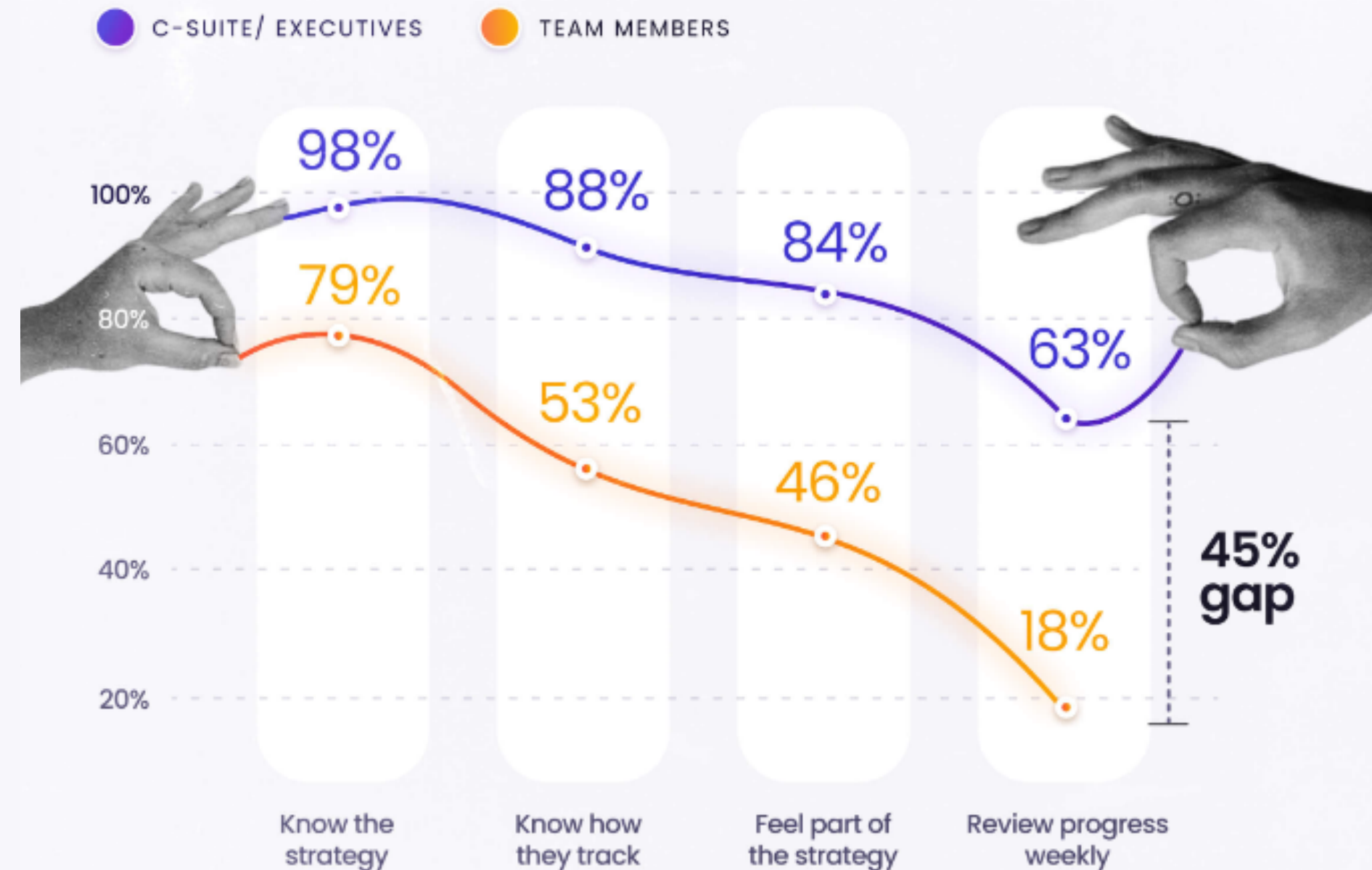
The further from the top, the less people know about their company's strategy.

Key Impact:

- Half of teams have no idea.
- People who aren't involved aren't effective.
- Disengagement = quitting.
- Leaders don't have a complete picture.

Source:

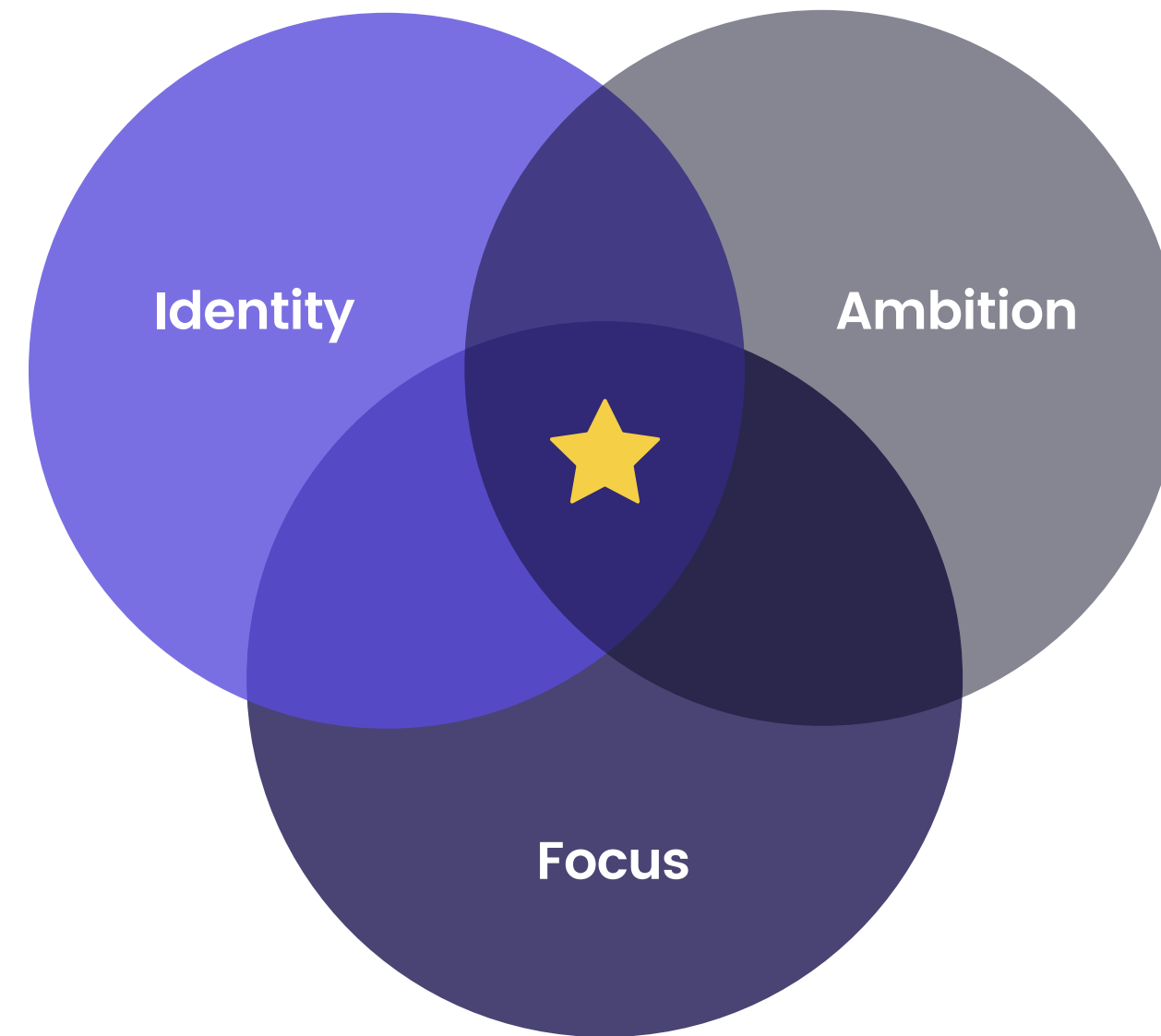
"You're Doomed or You Adapt" – Strategy Report



This survey was completed in partnership with our research partner Momentive, Survey Monkey's business arm. The report is based on a survey involving answers from 1,765 people of all reporting levels, from team members and individual contributors all the way to C-level executives at mid to large organizations, with 1,000 employees or more.

How to successfully Execute?

- ✓ The first step to successfully executing your strategy is to start with a successful planning process
- ✓ Engage your whole organisation from the planning phase
- ✓ Create tangible goals for **everyone!**
- ✓ Ensure there is a time to share progress of goals, and that there are always ways to quantitatively measure goals
- ✓ Performance management should be a natural extension of goal setting, which in turn is a natural extension of your strategic plan
- ✓ Build a culture of execution by linking rewards with your strategic plan.



**Let's see execution
in action!**



and remember...

1

There will
never be a
perfect plan.

2

There is no replacement
for commitment.

3

There is no
over-communication.

Part Three: Executing your strategy

Recap on Part Three!

- ✓ Empower employees to make their own decisions
- ✓ Ensure your teams know the strategy and know how to execute it
- ✓ Ensure all employees have goals to work towards and can measure their success
- ✓ Look at your meeting agendas – Do teams have space to report on their goal progress?
- ✓ Assess your rewards program – Are you rewarding fairly to those who are natural leaders?



Strategy Workshop Contest



The poster features a dark background with a city skyline. At the top left, there are two overlapping triangles, one purple and one orange. In the top right corner is the Cascade logo. The text 'CONTEST TIME!' is centered. Below it, the main headline reads 'Win a personalized Strategy Workshop for you & your team.' To the right of the text is a large silver trophy with purple lines radiating from it. Below the headline, it says 'YOU ONLY NEED TO:' followed by three steps in light blue boxes. Step 1: 'SHARE' with the URL 'www.cascade.app/strategy-report-2022'. Step 2: 'ADD' with the prompt 'In one sentence, what did you like about it?'. Step 3: 'TAG' with '@Cascade' and a reminder 'Don't forget! This way we'll know your participating.' Orange circles with white plus signs are placed between the steps.

CONTEST TIME!

Win a personalized Strategy Workshop for you & your team.

YOU ONLY NEED TO:

- SHARE**
the report URL in a LinkedIn post:
www.cascade.app/strategy-report-2022
- ADD**
your own take!
In one sentence, what did you like about it?
- TAG**
@Cascade
Don't forget!
This way we'll know your participating.

What you need to know & how to participate?

- ✓ Follow the 3 simple steps in the image: 1. SHARE; 2. ADD; 3. TAG.
- ✓ Only attendees of the Strategy Bootcamp can win.
- ✓ Workshop for 20 people (max).
- ✓ You will have a meeting prior to the workshop to align with our expert.
- ✓ The workshop needs to happen before end of 2022.
- ✓ The winner will be announced on Sept 1st on our LinkedIn Company Page.

You will receive an email after the Bootcamp with this information!

Part Four

4 Refining your strategy

Achieve 25% Growth in Asia Pacific by 2023

Reduce wait times for distribution

31 Dec 2021

On Track

Average <5 minute turnaround

31 Dec 2021

At Risk

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Eg. Hit our carbon

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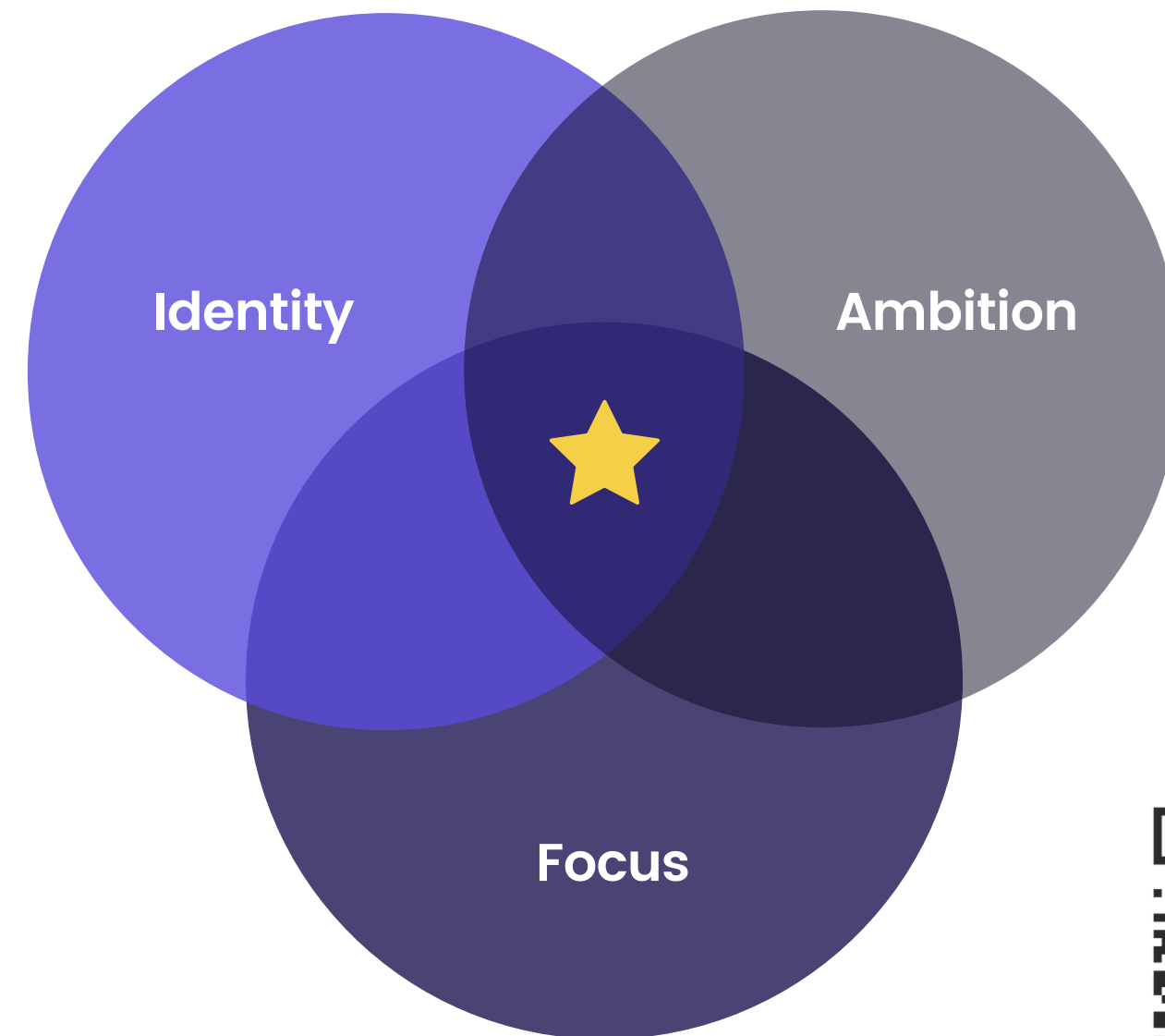
Every strategic leader ever

Initiative

Eg. Purchase 25 new EV vehicles for Northern fleet

How to refine your strategy & accelerate teams

- ✓ Ensure goals are actionable and inspirational
- ✓ A good strategy maps out the choices your people will take, and choices mean Plan A, Plan B and even Plan C
- ✓ Regularly assessing the performance of your strategic plan, will eventually mean adjusting it
- ✓ Don't be afraid to change your strategy within the year as the market changes
- ✓ When things don't go as planned, learn from them and move on as a team.



Learn More!



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**Download the
Workbook!**





Part Four: Refining your strategy

Recap on today's bootcamp!

- ✓ Follow the IDEAL methodology - Use your workbooks!
- ✓ Involve your people early, never stop planning!
- ✓ Over-communicate your strategy - Don't let it die in PowerPoint
- ✓ Celebrate momentum and small wins!
- ✓ Ensure everyone has goals working towards your company vision
- ✓ Test out all of this in Cascade... for FREE!

Making great visions happen

Q & A

- [Start a trial](#) or [request a demo](#) with us.
- Ask me anything!
- Network with us!



Presented by  cascade

Strategy Bootcamp 2022

Jeremy Jarvis
Strategy Execution Director

