

# WINNING STRATEGY EXECUTION BLUEPRINT

How to create a winning strategy execution plan that  
enables you to achieve your objectives and get results

WILL BARNETT



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# Welcome

Hi,

My name is Will Barnett and I am the founder of Shapecast. I help leadership teams to execute their strategies so they can achieve their objectives faster and more effectively.

I created this winning strategy execution blueprint e-book to outline the stages of strategy execution planning for our clients, to enable them to create winning strategies.

On completing this e-book, I hope you will have a good understanding of the process we follow to create world-class execution plans that enables you to achieve your outcomes and objectives.

More importantly, I hope you find some useful nuggets of information that will help you in putting together winning strategy execution plans for your organisations.

A handwritten signature in black ink, appearing to be 'WB', with a long horizontal stroke extending to the right.

# Introduction

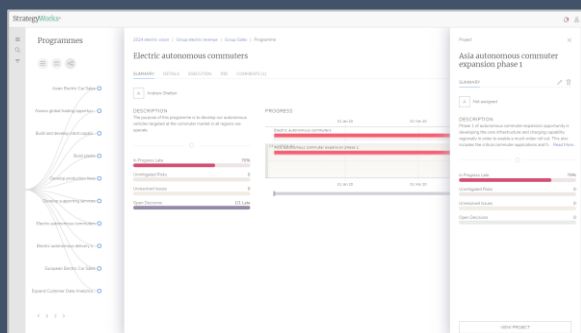
In the course of the transformation and strategic change work we ran with clients over the last decade and more, we noticed a common challenge. We observed leadership teams who frequently have clarity of their objectives, but don't always have a strong supporting execution framework that enables them to clearly see how the objectives will be achieved.

The purpose of this strategy execution blueprint is to help leadership and delivery teams to create purpose, motivation and clarity about their future objectives and the delivery plan through a simple, easy to follow framework.

My goal is to help you to do more and achieve your objectives faster and more effectively.

*“Success doesn’t necessarily come from breakthrough innovation, but from flawless execution.”*

Naveen Jain, CEO of Infospace



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CHAPTER 1

# CREATING A COMPELLING VISION AND MISSION

Design your perfect future that excites and aligns everyone  
involved in getting there.



# Vision and mission

Creating an inspiring vision and mission for the organisation is one of the most important steps a leader can take. Organisations that have a clear and compelling vision of the future and reason for being, generate the most investment, galvanise staff and partners in to the future and create the most focussed workforce.

## Defining the mission

The mission is your organisation's reason and purpose for being. The mission is not linked to any specific time line and does not result in a specific outcome. The mission should inspire great staff to join the organisation and it should resonate deeply with staff, partners and investors.

## A mission should

- Be true throughout the life of the organisation
- Be why the organisation exists
- Rarely change

Not every company has a mission but if your organisation has a clear purpose, we strongly encourage leaders to define the organisation's mission. It galvanises all stakeholders and enables staff and stakeholders to be emotionally engaged with the purpose.

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# Create a compelling vision

The vision statement should enable stakeholders to imagine the organisation as it could be once the objectives and/or the mission has been achieved.

The vision should define what the organisation will become and/or how the world will be as a result of the achievement of the vision.

A shared future vision is essential to create clarity of purpose and a sense of unity about the future. We like to make the vision as clear and as concrete as possible, so that the widest group of people can understand the future of the organisation and how they can contribute to making it a reality.

The vision statement should:

- Be as specific as possible
- Set the future direction of your organisation
- Be time bound if possible (i.e. when do you expect the vision to become a reality).
- Define either about the impact of your organisation on customers/markets or what the organisation will become when the objectives have been achieved

Mission = Every day

Vision = Some day

# Examples of good mission and vision statements



**Mission Statement.** “To organize the world’s information and make it universally accessible and useful.”

**Vision Statement.** “To provide access to the world’s information in one click.”

Google clearly and concisely state why they do what they do (the mission). The vision defines the customer experience they expect when they have achieved their objectives.



**Mission Statement.** “To attract and attain customers with high-valued products and services and the most satisfying ownership experience in America.”

**Vision Statement.** “To be the most successful and respected car company in America.”

The ongoing mission is create an experience but their vision is to be the most successful in America, i.e. when they have achieved their mission, they will be the most successful.



**Mission Statement.** “To bring the best user experience to its customers through its innovative hardware, software, and services.

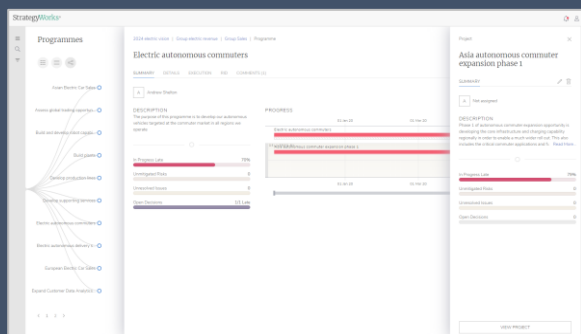
**Vision Statement.** “An apple computer on every desk”

The mission is to improve the experience to customers (always). Once they achieve this, there will be an Apple computer on every desk. Simple, effective and easy to envisage.



## Steps to create an inspiring vision

1. **Determine the vision timeline.** Think about how far you want to create a vision for. The farther out the vision timeline, the harder it will be to create clarity and certainty. A long timeline also makes it harder for members of the organisation to imagine the path to achieving the vision.
2. **Visualise the future.** Visualise the organisation or customer outcome as it will be when you have achieved your goals. The vision statement should be as clear and as concrete as you can make it. The fuzzier the vision statement, the harder it will be for people to imagine the future. Be bold, be daring, be as clear and forthright as you can be.
3. **Vision and mission consistency.** Ensure the vision statement supports your mission and values where they are defined. Confirm your vision supports and enhances your reason for being as an organisation. Your vision should create clarity on the future outcome which is aligned with your mission statement and does not clash with your values as an organisation.
4. **Ratify the vision.** Ratify the vision statement with stakeholders including non-execs, wider leadership team members and any advisers. Seek input and advice to ensure that your vision statement is bold and consistent with other members of the leadership.



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## CHAPTER 2

# CREATING BALANCED OBJECTIVES

Simple, clear, achievable outcomes that create excitement to  
do more



# Creating balanced objectives

Objectives set out and define what is it that you are trying to achieve as an organisation. They do not define how the objectives will be achieved or even when necessarily, but they must be clear statements of intent and goals that ultimately can be measured through key results or KPI's.

Importantly, the objectives must support and enable the vision that you have set out in the previous stage, so that once the objectives have been achieved, your vision will be realised.

Good objectives will also cover a wide range of different areas of the organisation so that you can ensure the overall organisation is being developed and enhanced to achieve the outcomes that you desire. Consider adding objectives across a range of balanced subjects of the organisation consistent with a balanced scorecard (more on this later).

## OKRs vs KPIs – which is best?

The two main terms to measure outcomes and performance are either Objectives and Key Results (OKRs) or Objectives and Key Performance Indicators (KPIs).

What is the difference, and which is best?

OKRs tend to be used at the strategic level and incorporate both objectives and their associated results (the results).

KPIs can be used both strategically but sometimes they are used for operational results(e.g. CRM platform go live). Consequently, KPIs aren't always used for strategic results.

In our framework both models are valid. However, if KPIs are chosen, it is important to ensure that the KPIs are used to measure business objectives rather than operational outcomes lower down the organisation. This will mean either:

OKR route

Objectives + Key results

KPI route

Objectives + Strategic KPIs

## Create effective, balanced objectives

Having created the vision statement, the objectives determining what you are trying to achieve should be aligned to your vision statement and should identify everything you are trying to achieve across different areas of the organisation. The objectives should be simple to understand and clear.

At this stage, do not worry about creating measurable outcomes for the objectives, just focus on critically what you are trying to achieve.

1. Create a balanced portfolio of objectives. Consider creating objectives across the following areas of the organisation:

- Customer perspective
- Internal processes
- Financial perspective
- Learning, innovation and growth

Good examples of objectives are

- Increase revenue
- Simplify operational processes
- Grow market share in North America



1. **Simplify and rationalise objectives.** Once a set of objectives have been agreed, aim to simplify to a manageable number. We recommend ideally between 2 and 10. The number of objectives will be dictated by the ability of the leadership team to focus on multiple objectives and outcomes. Smaller organisations will need to focus on the most important objectives that drive growth, for example revenue and profitability. Established and larger organisations can take a more balanced view to objectives, but the number should still be manageable.
2. **Decompose and cascade.** Decompose objectives based on the organisation structure. Once the major driving objectives has been identified, the next stage is to decompose the objectives so that different areas of the organisation can deliver respective sub objectives. For example, if a headline objective is to drive growth, if the organisation is organised geographically, consider assigning growth targets to each regional area. Alternatively, if the organisation is organised by product or service lines, partition to target growth to each different service line and make the objective more specific, e.g. product line 1 growth, product line 2 growth, etc

## CHAPTER 3

# CREATE FOCUSSED PERFORMANCE MEASURES

Measuring what matters so that it can be improved

*"However beautiful the strategy, you should occasionally look at the results."*

Sir Winston Churchill (1874–1965), British politician

# Create focussed performance measures

Having defined the objectives which will support your vision, the next stage is to identify how to objective performance. Two common measurement types are **Key Results (OKRs)** and or **Key Performance Indicators (KPIs)**.

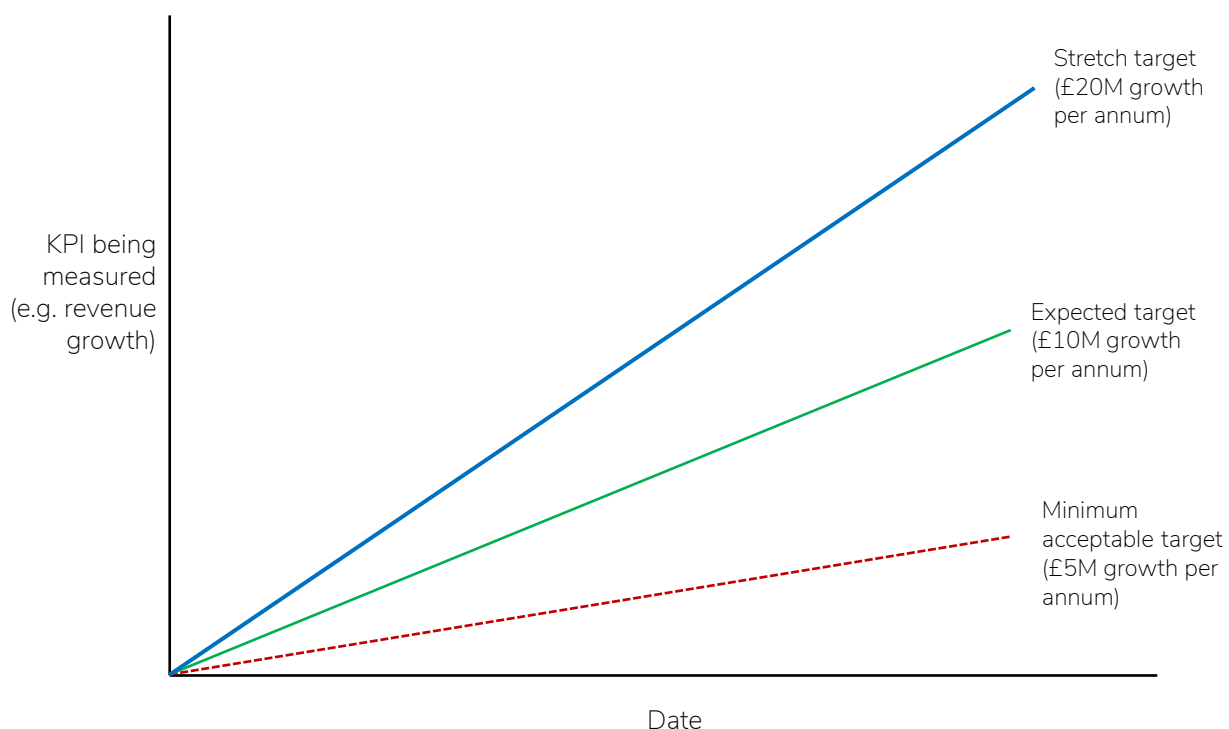
## Example taking the KPI approach

Given our previously identified objective of revenue growth, a good KPI measure might be :

Increase revenue by £10 million per annum by December 22<sup>nd</sup> 2022.

What is important with performance measures is they have both target value(s) and a clear timeframe within which you expect performance measures to be achieved. This enables clear understanding of which performance measures are either under or overachieving.

In some instances, it may also be helpful to create minimum, standard and stretch target KPI values for each KPI as follows:



## Steps to create effective performance measures

- 1) **Identify key measures.** For each objective, identify an (ideally small) number of performance measures that most pertinently measure the objectives. For each KPI, identify the units, the amount, and the timeframe within which you expect the measure to be achieved (see example above). What is most important for performance measures is that they are **Specific, Measurable, Actionable, Realistic and Time bound (SMART)**. For each objective, it is okay to choose multiple key performance indicators of different types but beware in creating KPI overload, as each KPI will need to be tracked and managed.
- 2) **Create minimum, standard and stretch measures.** If necessary, choose minimum, standard and stretch KPI measures for each objective as described above. These different metrics for each KPI can help set objective performance levels for teams and leaders and can be used for individual personal performance measurement once you are in execution delivery mode.
- 3) **Identify KPI owners.** The final step is identifying how performance measures will be measured and by whom. Identify who is the natural owner for each KPI and is accountable and responsible for ensuring the KPI is measured and reported on. The KPI owners are not necessarily the individuals who are accountable for the performance, they are simply the people that are accountable for ensuring that the measurement of the KPI happens and is reported on in a timely way.

### Do KPIs always need to be SMART?

Put simply – yes! Our firm belief is that if you cannot measure an outcome, it is difficult to improve it. Nearly all aspects of organisation performance, culture, customer satisfaction, and other areas can be measured in some way.

CHAPTER 4

# MAKE INNOVATIVE STRATEGIC CHOICES

Think outside the box in order to radically improve  
performance



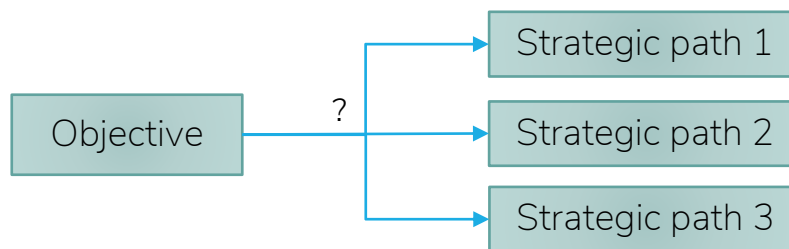
# Make innovative strategic choices

We should now be in a position where we have a balanced set of objectives and an effective set KPI's which measure the performance of the objectives with measure levels that we can use to drive the performance of both teams and individuals.

Collectively, these identify what we are looking to achieve and by when.

The next stage is to define our strategic choices that determine how we intend to achieve each objective. This is an area that is frequently overlooked because it is not a natural planning stage to some. It is easy to leap in to thinking about existing and new programmes of work without considering different ways of delivering our objectives.

By missing this important step, it is easy to make implicit assumptions about the best way to deliver without considering potentially innovative new or more effective routes to our goals.



## What are strategic choices?

For each objective, define the different ways that the objective could be achieved. In our experience, this is best done collaboratively, and we advise temporarily ignoring existing programmes or initiatives where possible, which might constrain the options planning process.

The purpose of a strategic choice is to enable consideration of new, innovative ways of achieving business objectives and enable leadership teams to clearly articulate why that are taking the course of action they are.

Strategic choices come with a set of assumptions and understanding which may be limited at the time of choice, that needs further testing and ratification once execution starts to validate the choice we have made. This is all part of agile strategy planning where choices must be made on incomplete information.

## Steps to define strategic choices

- 1) The art of the possible. For each objective, work collaboratively to define the different choices you must achieve the objective. Try to forget existing ways of delivering (which might be based on old assumptions, viewpoints, or beliefs).
- 2) Compare and rank choices. Identify (again, collectively if possible) the pros and cons of each choice based on your capabilities as an organisation. Identify gaps or problem areas which would need to be addressed for each strategic choice.
- 3) Identify capability gaps. Where gaps in capability have been identified, plan the options to address the gap. Examples could be working with new or existing suppliers, planning a joint venture or buying missing capability from the market from an existing organisation or competitor.
- 4) Prioritise choices. Prioritise and rank the strategic choices and identify which is the winning choice for each objective (and why).
- 5) Document the decisions and rationale. Document the choices clearly to that these can be explained to your teams, partners, investors and third parties where necessary so that its clear why the selected course of action is being taken. Make clear the assumptions that have been made and how the assumptions will be tested and validated.



CHAPTER 5

# CREATE A PERFECTLY ALIGNED PORTFOLIO

How to create focus on what is really important

## Create a perfectly aligned portfolio

We are now in a position where we have clarity on our objectives, effective key performance indicators defined, and we understood strategic choices we intend to take for each of our objectives.

The next stage is focused on creating a new delivery portfolio or aligning our existing portfolio to the strategic choices that we have made so that we can achieve our objectives.

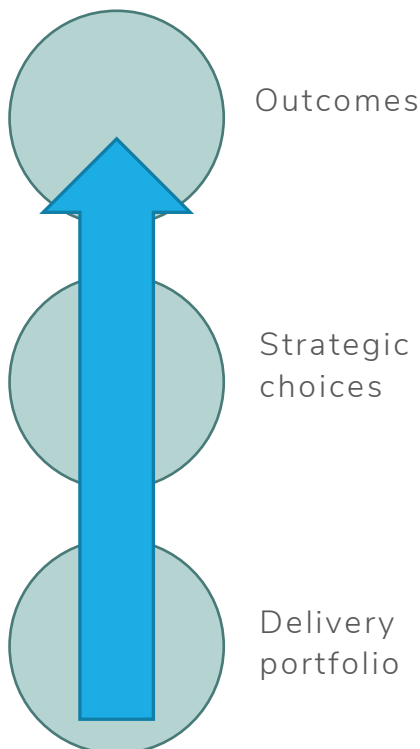
Many organisations building execution plans already have an investment in an existing delivery portfolio (groups of initiatives, programmes and projects).

The challenge is linking the existing investments in projects and programmes to new strategic choices and identifying any gaps and changes that are necessary in order to deliver against the strategic choices efficiently.

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## Steps to creating perfectly aligned delivery portfolio

1. Identify major initiatives. For each strategic choice made in Section 4, collectively identify the major initiatives and programmes which are already running that support those strategic choices (for example, existing marketing initiatives driving new revenue)
2. Assess scope. For each programme or initiative, identify whether the programme scope adequately covers the strategic choices or if there are any gaps (for example the marketing initiative is too narrow to drive the expected uplift in new revenue). If there are gaps, determine if the scope of initiatives could be easily extended to provide better coverage of each strategic choice.
3. Identify gaps in delivery. Once all projects and programmes for specific strategic choice have been identified, determine whether there are any further gaps in the delivery portfolio which may mean that strategic choice will not be achieved. For example, if a strategic choice is to deliver a new online service product, to we have enough programmes and projects required to create the service and make the service live.
4. Cut the waste. Identify any programmes or projects which are providing a similar outcome for any strategic choice. Where possible, identify overlaps in investment which enable you to simplify or streamline your execution portfolio that still deliver the same strategic choice or outcome.
5. Decompose and cut further waste. Once major initiatives or programs have been identified and the high-level, break each programme down into a series of existing or new projects that ensure the outcomes of the program or initiative will deliver your strategic choice. Again, where possible identify any projects that are already running which are providing the same or similar outcomes that can be simplified or rationalised thereby reducing cost.

CHAPTER 6

# MAP STRATEGIC VALUE

Manage the impact of benefits on strategic outcomes

## Chapter 6 – Map strategic value

In this next stage, it is important to know that the projects and programmes that we have identified against strategic choices, that if executed to plan, are going to have the impact that we expect on our key performance indicators.

Mapping strategic value focuses on assessing the benefits and outcomes of projects and programmes to determine whether the benefits that we deliver across the entire portfolio will provide the impact on KPIs that we expect. This minimises the risk that there are no nasty surprises when projects and programmes are delivered that objectives still haven't achieved what we set out at planning time.

### Steps to mapping strategic value

- 1) Link benefits to KPIs. Review each initiative, programme and project and the benefits expected. Ensure that the benefits provided by the projects and programmes contribute and affect key performance indicators. For example, if we have a revenue growth KPI, ensure that there are sufficient benefits across contributing projects and programmes which are expecting to deliver revenue growth at our minimum, standard and stretch performance levels.
- 2) Identify benefits gaps. Where projects and programmes do not have benefits cases identified, remodel benefits and outcomes from projects and programmes to ensure they are providing contributions to our target KPI levels. The aim is to ensure we have sufficient benefits to reach the KPI outcomes. If there is a gap between projects and programme outputs and KPIs expected values, identify if either further investment is required or whether the scope of existing projects and programmes can be modified so that they provide further benefits to cover the expected KPI target levels expected.

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Track and manage the benefits and value of your portfolio against strategic objectives. Designed from the ground up to make managing your strategy easy.

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## CHAPTER 7

# CREATE ULTIMATE ACCOUNTABILITY

Ensuring ownership of the plan throughout the organisation



## Section 7 – Creating ultimate accountability

At this point in the process, we aim to have a fully aligned strategic execution plan linked to our objectives and business vision.

The next stage is ensuring that stakeholders across the organisation are accountable and motivated to deliver the outcomes. We aim to ensure that every aspect of our execution plan has accountability and ownership from our leadership team downwards throughout the organisation.

### Steps to creating ultimate accountability

- 1) Walk the execution path. Starting from the very top of the execution plan identify each objective, KPI, strategic choice, initiative, programme and project to identify who across the organisation specifically should be accountable for the delivery of that part of the plan. We highly recommend using a RACI framework to define accountability and ownership.
- 2) Identify gaps and building resourcing and investment plans. Throughout the process of identifying accountability and responsibility, it is natural for gaps to be identified where further resource is required. Once gaps are identified, consider whether the missing resource could be provided through partners or suppliers. If not, identify the types and priorities of the new resources required and benchmark investment are required to deliver this part of the plan.

#### What is a RACI and how can it help?

A RACI defines who is Accountable (the person who is ultimately in a position of success or failure for the outcome), Responsible (the person or people who are involved in doing the work), Consulted (the person or people who are consulted throughout the process of completing the work may not necessarily be directly involved in the work themselves). The Informed (the person(s) who are informed once the work has been completed).

A RACI is a very useful tool to ensure each activity within the execution is fully defined with accountability and ownership. This helps drive ownership and forms the basis for performance based remuneration packages.

#### R A C I



Responsible : parties doing the work



Accountable: Single person who must make sure the activity is completed (but not necessarily performing the work)



Consulted: People who are not directly doing the work but are consulted throughout



Informed: Informed parties once the work or outcome has been achieved.

### Steps to creating ultimate accountability (continued)

- 3) Identify teams/individuals running too hot. In addition to identifying gaps in your execution plan, it is also important to identify individuals or teams which are overloaded and therefore are likely to be unable to deliver what is being asked of them. This is a sure-fire recipe to lead to burnout and/or attrition of key staff. When areas are identified, prioritise only the activities key staff can perform and offload less specialist skills across the organisation or to partners or suppliers.
- 4) Cascade and assign ownership. Once accountability has been assigned to leaders, it is important that ownership and accountability is cascaded through the teams to ensure that all teams across the organisation of working towards the delivery of a set of common objectives.
- 5) Bake accountability into annual objectives. Once accountability and ownership within the plan has been identified, make sure that the ownership plans are included within individual's annual objectives so it is clear what is expected of them and the impact they are having on the strategic outcomes of the organisation.



## CHAPTER 8

# EXECUTE, MONITOR & COMMUNICATE LIKE A HERO

Monitoring progress to ensure momentum remains high



## Section 8 – Execute, monitor and communicate like a hero

Having created a winning execution plan, the next stage is to execute the plan and to monitor how well your execution plan delivers the expected outcomes.

Having effective execution plan is extremely powerful but the reality of most plans is that what you expected and the assumptions you've made are not always correct and the plan needs to be constantly adjusted over time in order to be successful.

For complex organisations, effective communicate with the entire team involved in execution is vital, so that they are clear what is working, what isn't and how they can contribute and support the execution of objectives as situation change or assumptions are validated.

## Steps to execute, monitor and communicate like a hero

- 1) Start delivering. Put simply, this is kicking off all the projects and programmes in the order defined by the strategic plan.
- 2) Test assumptions. Create milestones and way points to test risks and assumptions created when making strategic choices. Ensure once tested, there is enough time to adjust the plan if assumptions prove to be incorrect.
- 3) Assess KPIs & execution in parallel. Regularly assess both the execution against plan, the benefits delivered and performance of KPIs. Ensure that execution and performance management happen in equal measure.
- 4) Adjust and flex as the plan develops. Identify what is working, what is not working and adjust either the strategic choices, initiatives or programmes and projects. The most successful execution plans are the ones the building the ability to flex and change as the situation changes. Avoid a mindset that changing your plan is a failure of planning. The reality of most organisations and the speed of change within markets requires flexibility and change. If you are clear on your objectives and strategic supporting plan, tactical agility is what will help bring successful outcomes.

"It is not the strongest species that survives, nor the most intelligent, but the most responsive to change." – Charles Darwin

CHAPTER 9

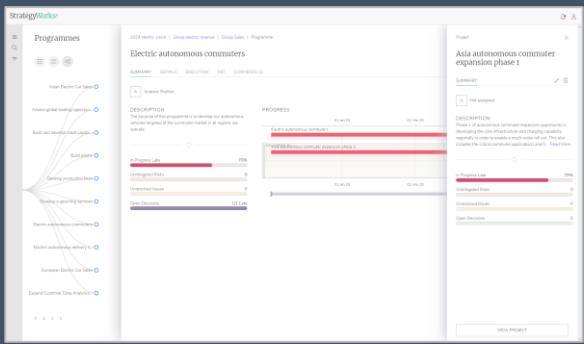
# DELIVER YOUR OBJECTIVES LIKE A PRO

How to bring it all together and deliver world-class  
performance in complex environments

## Section 9 – Deliver your objectives like a pro!

There is a lot to consider both in the planning of your strategic objectives and the delivery of your execution plan. For some, much of this execution planning can be performed on a spreadsheet.

For most larger, more complex organisations, planning the execution of strategic objectives, tracking execution that goes into the delivery of those objectives and performance can be managed on a spreadsheet.



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To help organisations create winning execution plans and to track and monitor ongoing progress and outcomes, we have developed StrategyWorks, which is a cloud-based platform to enable leadership teams to successfully deliver and monitor their strategies.

If you would like to find out more about how StrategyWorks can help you to achieve your strategic objectives and manage your entire execution plan across the organisation, please arrange a free demo by clicking the button above.

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