

# STRATEGY AUTOMATION

## 6 PERSPECTIVES OF CHANGE AGENDA



PAST STATE

### Ad-Hoc Approach

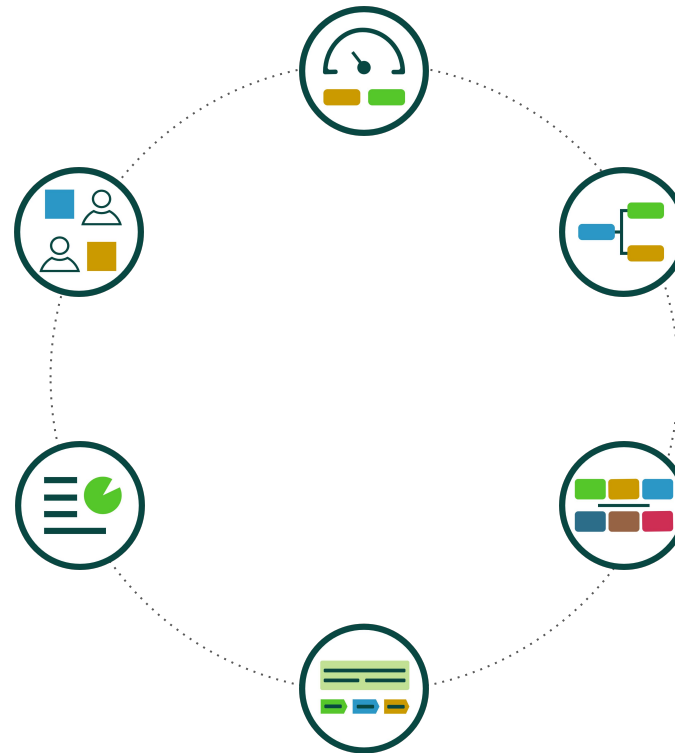
Managing strategy with **spreadsheet** and **presentation** software.



FUTURE STATE

### Specialized Software

Strategy is automated with **specialized** strategic planning software.





## Perspective 1

# Performance Indicators



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Specialized Software

- Broken calculations
- Decomposition is limited to 2-3 levels of goals

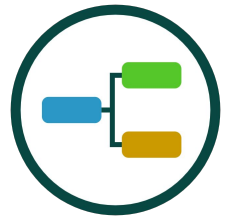
As the scale grows, maintaining a spreadsheets scorecard becomes a challenge.

Lacks awareness of the type of data you are managing.

- Automatic **calculations**
- **Limitless** strategy decomposition

Ensures **data consistency**:

- Update intervals
- Weights and data normalization
- Leading and lagging indicators
- Aggregated data

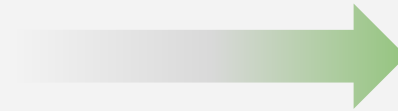


## Perspective 2 Strategy Maps



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Specialized Software

- Difficult to update
- Lacks up-to-date data
- Little value for strategy discussions

A map diagram created in presentation software is a static image.

- Created **automatically**
- Always **up-to-date**
- Shows goals, risks, indicators, and initiatives

The role of strategy map changes to:

- Facilitate strategy **presentation**
- Provide **supporting details**
- Automate **brainstorming** sessions



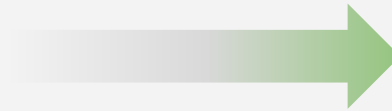
Perspective 3

## Templates and Frameworks



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Ad-Hoc Approach



FUTURE STATE

Specialized Software

- **Five Forces** - Analysis of competitive landscape
- **PESTEL** - Analysis of external factors
- **Ansoff Matrix** - Planning growth strategies

Visually appealing templates from the Internet are **disconnected**.

Shared strategy workspace.

- Business frameworks **embedded** within the software
- An easy way to **align** the insights from the templates with the company's strategy
- **Templates** for some popular strategy and functional scorecards (cybersecurity, supply chain, talent management)



## Perspective 4 Strategic Alignment



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Specialized Software

Works on a low level, fails on high level.

- Aligns goals with KPIs and initiatives
- Fails to align strategy and function scorecards
- Fails to align templates and scenarios with strategy

- Alignment “by design” for goals, KPIs, risks, and initiatives
- Alignment by perspectives, normalized goals, or by a shared context for scorecards

Creates a **single source of truth** regarding strategy!

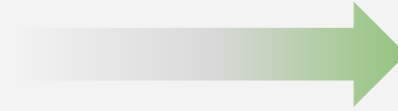


## Perspective 5 Reporting



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Ad-Hoc Approach



FUTURE STATE

Specialized Software

Reporting with general-purpose office tools is time consuming.

Different paradigm for reporting.

- Instead of generating a report, share a **link** to access the required data
- A report can be generated **automatically** by the software
- Send out reports on **schedule**

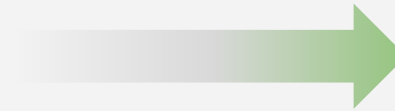


## Perspective 6 Teamwork



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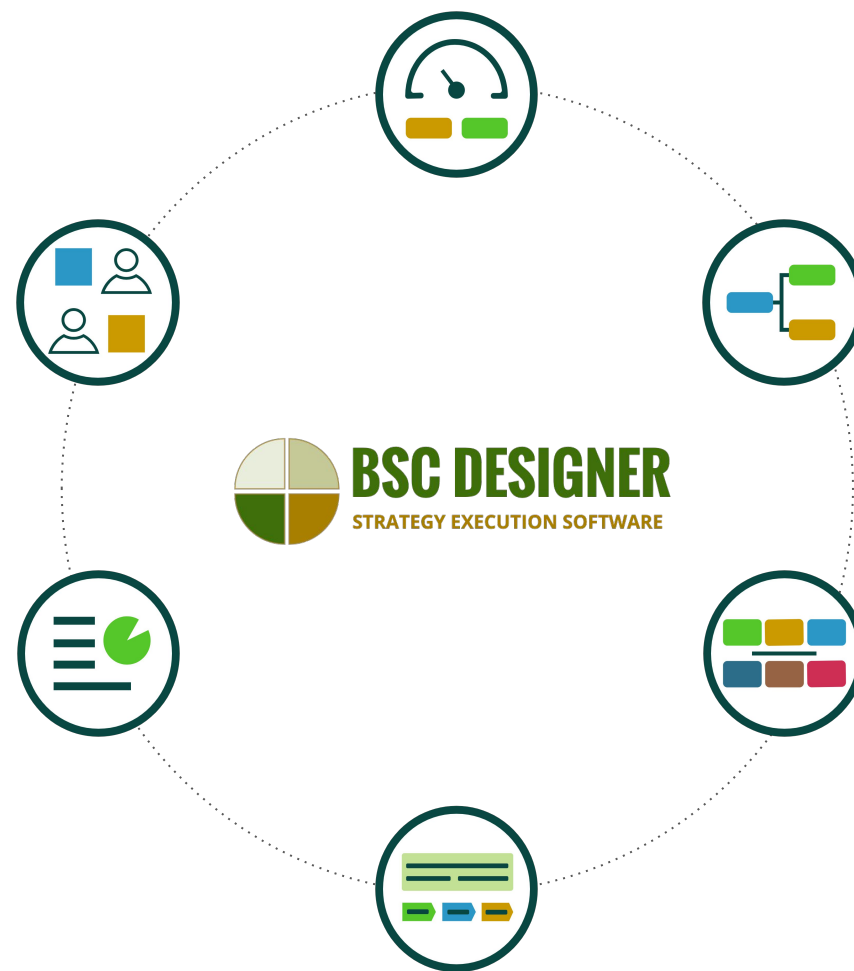
FUTURE STATE

Specialized Software

Access controls are designed for general-purpose use cases.

- Lack of accountability: no way to track **who** introduced the changes and **why** they were made.

- **Audit trail**
- **Access control** for scorecards and indicators
- Automatic **notifications**
- Workflow for securing **historical data**
- **Approval** mechanisms for new data



# Thank you!

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