

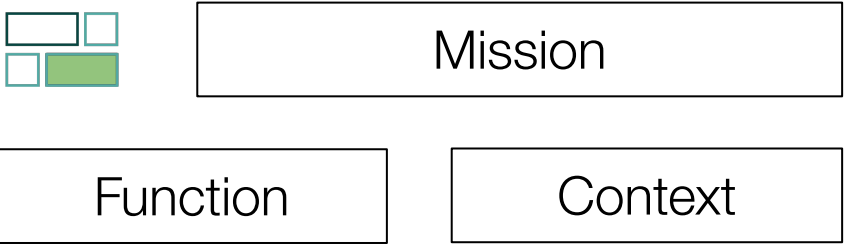
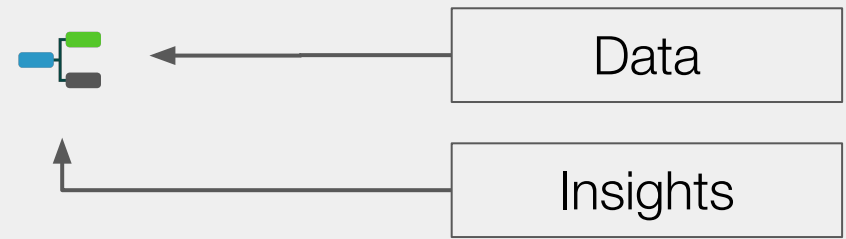
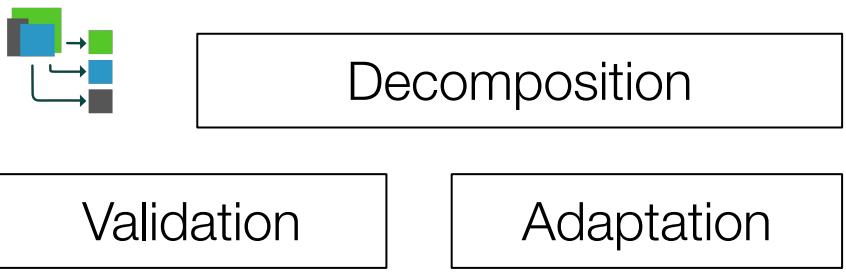
STRATEGIC PLANNING: WHO NEEDS TO BE INVOLVED?

Examples of BSC Designer subscription costs depending on the organization's maturity in strategic planning.


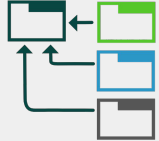
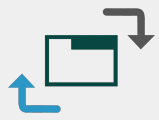
Key Topics:

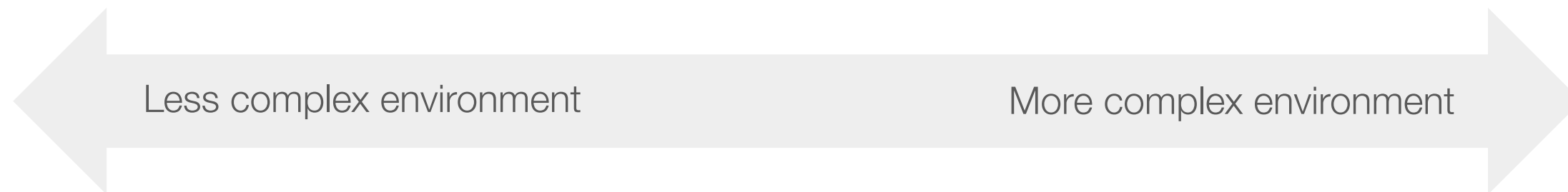
1. Tiers of **Involvement** in Strategic Planning
2. Levels of Strategic Planning **Maturity**
3. Examples of BSC Designer **Pricing**

3 TIERS OF INVOLVEMENT IN STRATEGIC PLANNING

<p>Tier 1. Awareness</p> 	<p>All employees should be aware about organization's strategy:</p> <ul style="list-style-type: none"> ● Mission-aware. Employees know the company's formal mission and vision statement. ● Function-aware. Employees can explain how their unit contributes to the company's strategy. ● Context-aware. Employees can explain how they support their unit's strategy.
<p>Tier 2. Contribution</p> 	<p>The role of employees changes from pure observers to contributors. This may involve contributing:</p> <ul style="list-style-type: none"> ● Insights, and ● Data reporting.
<p>Tier 3. Collaboration / Ownership</p> 	<p>Employees are involved in strategic planning activities:</p> <ul style="list-style-type: none"> ● Analyzing the needs of stakeholders. ● Decomposing high-level goals into smaller sub-components (sub-goals, initiatives, metrics). ● Establishing performance measurement for the goals. ● Validating hypotheses in practice. ● Adapting strategy to new factors.


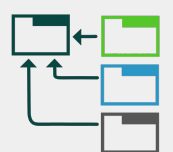
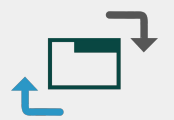

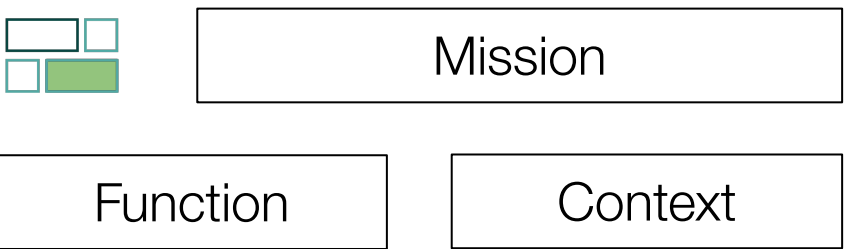
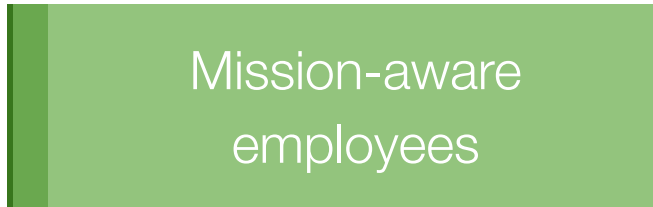



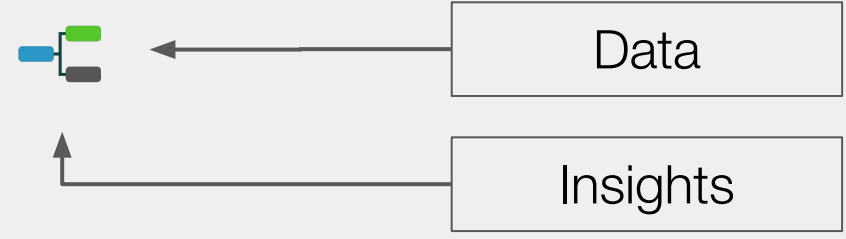

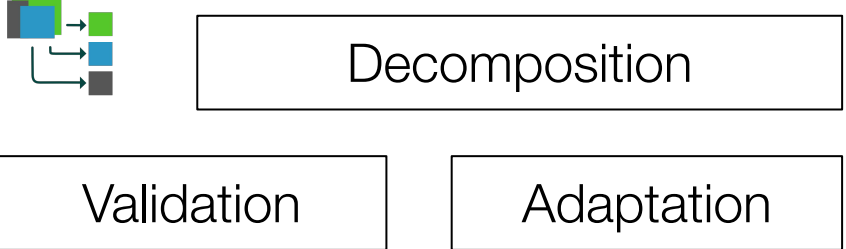

3 LEVELS OF STRATEGIC PLANNING MATURITY

 <p>Level 1. Formal Strategy</p>	 <p>Level 2. Cascaded Strategy</p>	 <p>Level 3. Collaborative Strategy</p>
<p>The formal strategy defined in a strategic plan, but is not used by management as a guiding tool.</p> <p>Typical examples include:</p> <ul style="list-style-type: none"> • Budgeting camouflaged as strategic planning. • Strategic plans created mainly with investors, regulators, or the press in mind. 	<p>The strategy of the business unit is formulated and maintained by 1-2 strategists and senior managers.</p> <ul style="list-style-type: none"> • The strategy is cascaded/mandated to other employees; • The operations team accepts the strategy “as is” and, • Involved in data reporting (tier 2), but not at the collaboration/ownership level. 	<p>Key employees are involved in strategic planning at the tier 3 (collaboration / ownership).</p> <p>Typical examples include:</p> <ul style="list-style-type: none"> • Organizations with well-developed unit-level strategies. • Senior managers projecting the corporate-level strategy onto the reality of their unit.



THE EMPLOYEE INVOLVEMENT AND STRATEGIC PLANNING MATURITY MATRIX

The percentage of employees involved in strategic planning.

<div style="text-align: right;">Strategic Planning Maturity</div> <div style="text-align: left;">Employee Involvement</div>	 Level 1. Formal Strategy	 Level 2. Cascaded Strategy	 Level 3. Collaborative Strategy	 Strategy Automation
Tier 1. Awareness 				 View-Only Users
Tier 2. Contribution 	3%	10-15%	15-30% of employees	 Data Input Users
Tier 3. Collaboration / Ownership 	1%	3-5%	5-10% of employees	 Power Users

PRICING EXAMPLES

Example 1


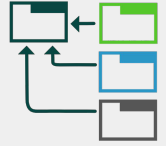
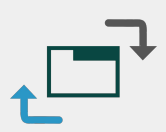



Total FTE (Full-Time Equivalent) Employees: **100**

	 Level 1. Formal Strategy	 Level 2. Cascaded Strategy	 Level 3. Collaborative Strategy
 Tier 1: View-Only Users	+	+	+
 Tier 2: Data Input Users	3	15	30
 Tier 3: Power Users	1	5	10
Professional Plan	1,259 USD / year	5,962 USD / year	11,798 USD / year
Enterprise Plan	N/A	10,055 USD / year	19,850 USD / year

	Professional	Enterprise
Customer Support by Email	✓	✓
Onboarding tutorials	✓	✓
Self-learning tools	✓	✓
Online training sessions		✓
BSC Designer Specialist certification		✓
Secure storage for strategy-related documents	5 GB	100 GB
RESTFull API (API calls per hour per power user)	100 calls / hour	500 calls / hour
Audit trail for general activity and values of KPIs	1 year	Unlimited
Lock historical data		✓
Approvals automation		✓

Example 2

Total FTE (Full-Time Equivalent) Employees: **250**

	 Level 1. Formal Strategy	 Level 2. Cascaded Strategy	 Level 3. Collaborative Strategy
 Tier 1: View-Only Users	+	+	+
 Tier 2: Data Input Users	7	35	75
 Tier 3: Power Users	3	12	25
Professional Plan	3,331 USD / year	13,925 USD / year	28,760 USD / year
Enterprise Plan	N/A	23,489 USD / year	48,111 USD / year

THE OFFICE OF STRATEGY MANAGEMENT (OSM)

The Office of Strategy Management concept was introduced by Kaplan and Norton in their [HBR article](#) in 2005, articulating among its functions:

- Establishing a shared process of scorecard development.
- Overseeing data collection, validation, integrity, and reporting.
- Standardizing terminology.
- Providing scorecard training and education.
- Aligning scorecards across the organization.
- Communicating strategy.


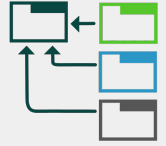



When scaling up into departments, divisions, etc., we will see that the maturity level of strategic planning **fluctuates**.

We need to focus on:

- Establishing **standards** for strategy development,
- Sharing **best practices**, and
- **Communicating** strategy across units.

Example 3

Total FTE (Full-Time Equivalent) Employees: **500**

	 Level 1. Formal Strategy	 Level 2. Cascaded Strategy	 Level 3. Collaborative Strategy
 Tier 1: View-Only Users	+	+	+
 Tier 2: Data Input Users	15	75	150
 Tier 3: Power Users	5	30 (25 + 5 OSM)	55 (50 + 5 OSM)
Professional Plan	5,962 USD / year	32,118 USD / year	59,157 USD / year
Enterprise Plan	10,054 USD / year	55,027 USD / year	99,593 USD / year

Example 4

Total FTE (Full-Time Equivalent) Employees: **5000**

	 Level 1. Formal Strategy	 Level 2. Cascaded Strategy	 Level 3. Collaborative Strategy
 Tier 1: View-Only Users	+	+	+
 Tier 2: Data Input Users	150	750	1500
 Tier 3: Power Users	50	260 (250 + 10 OSM)	520 (500 + 20 OSM)
Professional Plan	56,009 USD / year	262,922 USD / year	508,929 USD / year
Enterprise Plan	93,109 USD / year	430,271 USD / year	825,699 USD / year

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