

# Strategic Thinking & Execution Planning

*Because the execution of an idea is  
always more important than the  
brilliance of the thought*

# What is a Strategic Thinking & Execution Planning Workshop?

---

---

It's a dedicated half, one and or two day offsite workshop for your executive and or management teams to complete a highly practical & immediately applicable strategic & execution planning process.

You will come away with either a draft or rebuilt version of a Strategic & Execution One Page Plan (OPP) and a list of priorities to execute, that will guarantee your company's growth & scale.



# The Proven Ingredients of our OPP Methodology

---

---

- A framework used by tens of thousands of successful companies worldwide, the elements of People, Execution, Sales & Cash are the elements you must master in order to increase growth & scale.
  - The principle of cascade planning & reverse hierarchy guarantee engagement & accountability levels that deliver repeatable results.
- |                                       |            |
|---------------------------------------|------------|
| ✓ Revenue Growth                      | +30 - 200% |
| ✓ Profitability Growth                | +10 - 30%  |
| ✓ Productivity Growth                 | +30 - 50%  |
| ✓ Employee Engagement Growth          | +40 - 70%  |
| ✓ Customer Success Net Promoter Score | +30 - 50%  |



# Who needs a Strategic Thinking & Execution Planning Workshop?

---

---

For CEO's & Executive teams that recognize they spend more time working IN-the-Business vs. ON-the-Business.

For businesses who need to find a structured, yet highly practical & customized, strategic thinking & cascade execution planning framework that enables a focus on the key decisions of People, Sales, Execution & Cash that will move the needle.

By applying the 3 fundamental principles of the right set of Priorities, Data/Metrics & Meeting Rhythms, you will ensure a healthy balance between the 2 drivers of People & Productivity that prevents growth from having an adverse affect on your business.



# How does your Team Benefit?

---

---

Executive & Management Teams come away with...

- ✓ An understanding of the Purpose, Vision & Values of the business
- ✓ Clarity on the direction of the business that's required for success
- ✓ Focus, Motivation & Alignment
- ✓ Ownership for the activities required to deliver business benefit
- ✓ A new set of tools / skill sets to be more lean, agile & productive



# How does your Company Benefit?

---

---

Tens of thousands of successful companies worldwide have reported...

- |                                       |            |
|---------------------------------------|------------|
| ✓ Revenue Growth                      | +30 - 200% |
| ✓ Profitability Growth                | +10 - 30%  |
| ✓ Productivity Growth                 | +30 - 50%  |
| ✓ Employee Engagement Growth          | +40 - 70%  |
| ✓ Customer Success Net Promoter Score | +30 - 50%  |

In good teams the management is sweating.

In great teams the workers are sweating!



# The One Page Strategic & Execution Plan (OPP)

---

---

Starting with a blank page, the OPP reflects 5 levels of effective cascade planning. Starting with high-level ambition @ Level 0 & laddering down to Level 4 tactical execution planning.

The OPP framework is principally derived from the following universal best practices that have lived the test of time.

- [Balanced Scorecard](#)
- [Strategic Execution Framework \(INVEST Model\)](#)
- [Agile Manifesto](#)
- [Cascade Planning](#)
- [Reverse Hierarchy](#)





# Why take time to do strategic thinking ahead of execution planning?

---

---

Time over time it's been proven that when a company doesn't change often enough, and adapts to a new set of realities, they die. The biggest barrier to change in today's organizations are...

- Inertia and the power of the status quo: 34%
- Lack of resources/competing priorities: 32%
- People not wanting to take risks that could hurt them: 26%
- Lack of skills/expertise to make changes: 5%

➤ 90% of the threats that impact our businesses are known to us in advance. We simply aren't focused, nor asking the right questions often enough



# Building a Strategic Execution Plan

---

- Objectives & Key Results (OKR's) are established
- Accountability for results (KPI's) are identified / assigned
- A short, medium & long-term roadmap for success is designed
- Cascade planning & reverse hierarchy engages the entire organization to accountable & focused on a 90 Day Execution Sprint



# What Problem does this Solve?

---

---

- 90% of strategies fail due to poor execution *(Harvard Business School)*
- 52% of employees doubt the company has the right plan *(Booz & Company)*
- Only 15% of employees know their company's top priorities
  - Even worse, only 6 know their own individual priorities *(Stephen Covey & Bob Whitman)*
- 64% say they having too many conflicting priorities
  - The vast majority of executives (82%) say functional departments in their companies get competing demands from different business units *(Booz & Company)*
- 60-70% failure rate for organizational change projects due to ineffective & unsustainable knowledge transfer *(McKinsey & Company)*



# So what is the problem?

---

---

People within the business don't know where the company wants to go, what to focus on or how to successfully execute strategies provided to them.

Strategies don't grow businesses, people do. It is the people in your business who must be motivated, engaged & directed to achieve the goals of the company. In order to grow & scale a business, not only do you need a winning strategy, but you need to ensure that you have the right people knowing what needs to be achieved, how to do it and what the priorities are.

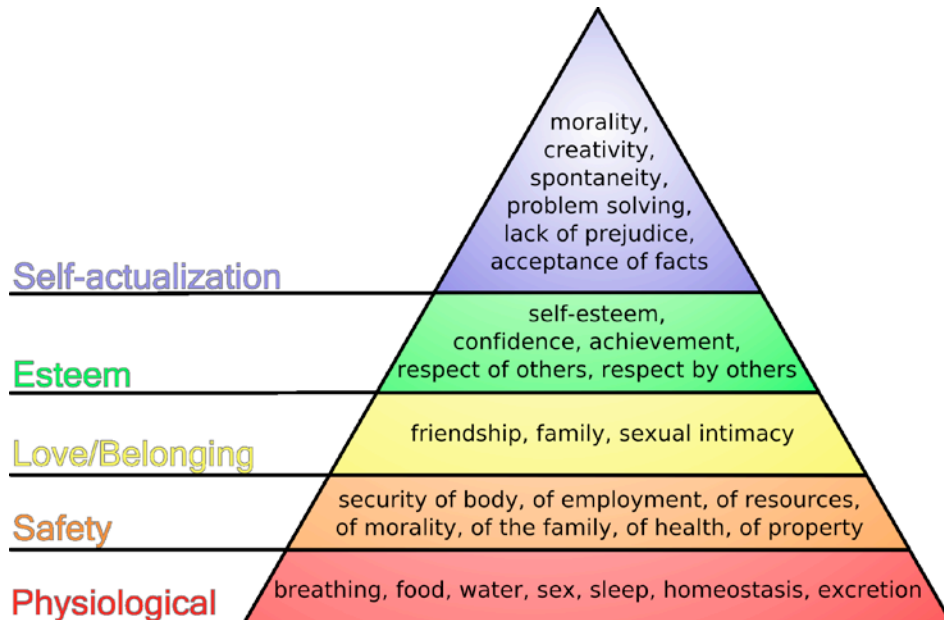
Most businesses don't do this this!



# Why this process is Transformational

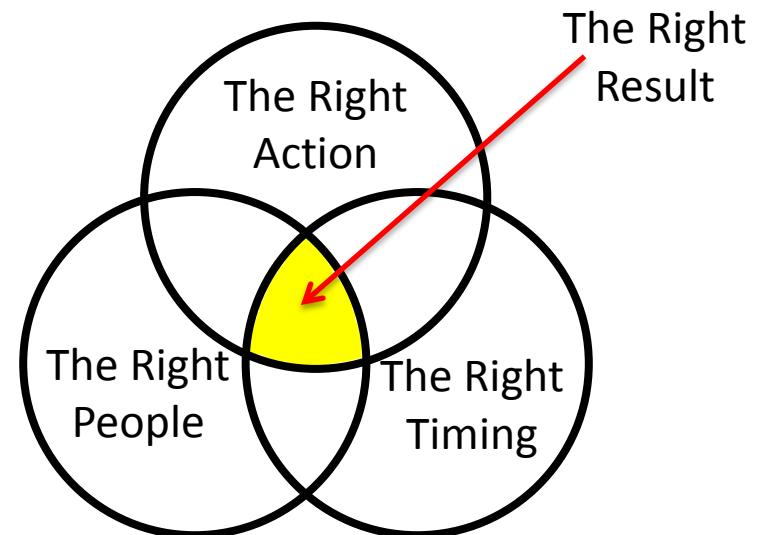
## Maslow's Hierarchy of Needs

- The “what’s in it for me” factor guarantees engagement



## Convergence Theory

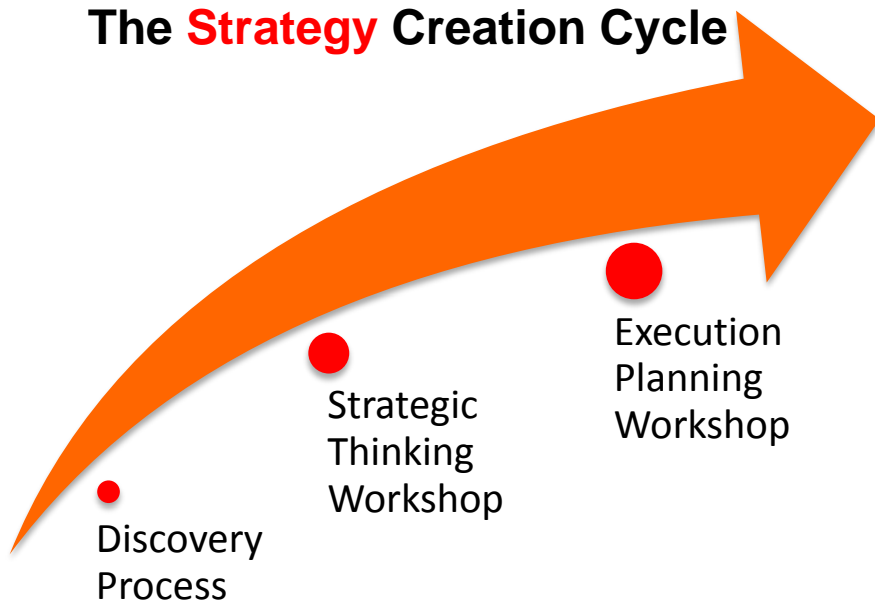
- Inspiration Top / Down
- Alignment & Execution Bottom / Up



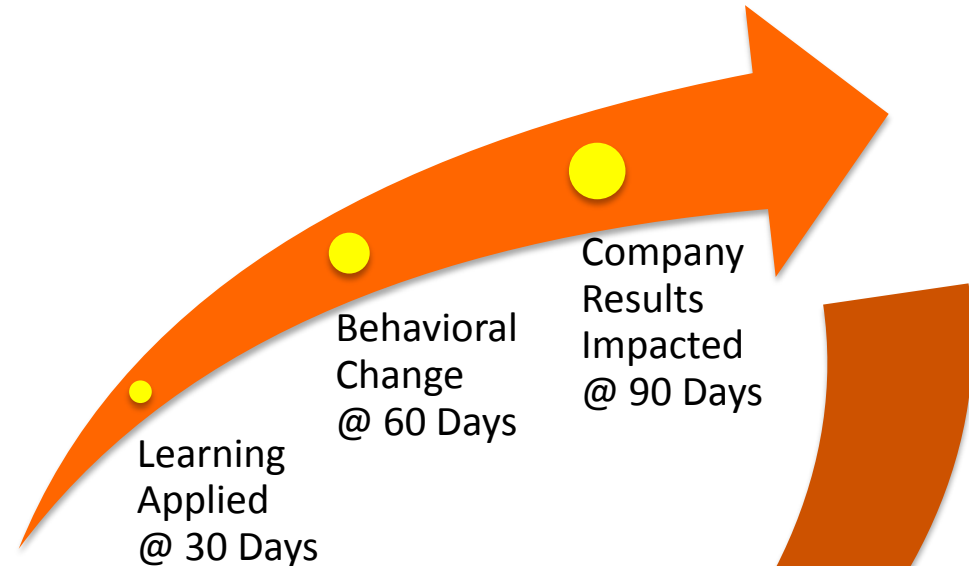
# The process at 10,000 feet

---

## The **Strategy** Creation Cycle



## The Execution & **Results** Creation Cycle



## An **Agile** and **Continual Improvement** Cycle

- Results pulse-check @ “period”-to-date vs. required
- Measure velocity, relevance & agility of results

# Why does this process work?

---

---

Most businesses simply don't spend structured time to think & plan.

The most expensive thing a management team can do is take time off-site to understand Strategic Thinking & Execution Planning.

Yet when performed correctly, this achieves the greatest impact on future growth and profits.

- |                                       |            |
|---------------------------------------|------------|
| ✓ Revenue Growth                      | +30 - 200% |
| ✓ Profitability Growth                | +10 - 30%  |
| ✓ Productivity Growth                 | +30 - 50%  |
| ✓ Employee Engagement Growth          | +40 - 70%  |
| ✓ Customer Success Net Promoter Score | +30 - 50%  |



# What 5 days will do for your company?

---

---

- 2 Day Strategic Thinking & Execution Planning per year
  - 1 Day Strategic Thinking & Execution Planning per quarter
  - 12.8 weeks per quarter (51 weeks per year) to execute
- |                                       |            |
|---------------------------------------|------------|
| ✓ Revenue Growth                      | +30 - 200% |
| ✓ Profitability Growth                | +10 - 30%  |
| ✓ Productivity Growth                 | +30 - 50%  |
| ✓ Employee Engagement Growth          | +40 - 70%  |
| ✓ Customer Success Net Promoter Score | +30 - 50%  |



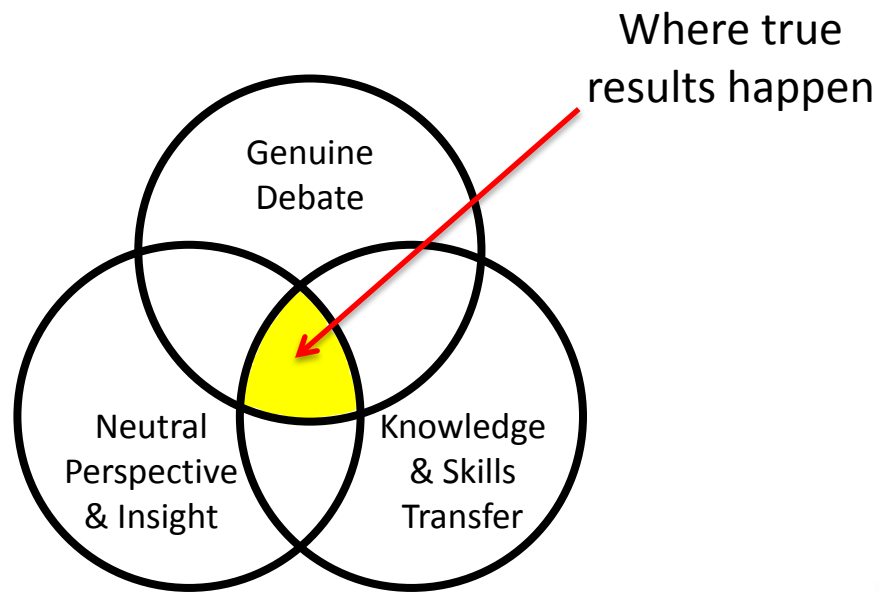


# The true value of a facilitated Strategic & Execution Planning?

---

---

Why engage a facilitator?



# Your Experience Facilitator



---

---

Driven by a purpose & passion to make heroes of everyone he touches, JC helps people and organizations grow 5x faster & better to realize their true potential.

+30 years of proven results across 5 continents & every stage organization imaginable. Working IN-the-business operationalizing Go-to-Market & Customer Success strategies so that CEO's can focus ON-the-business.

- 16 years as COO (Chief Operations Officer), CTO (Chief Technology Officer) & Customer Services Director @ Fortune 500's
- 14 years as Interim Executive Manager, Entrepreneur in Residence & Business Coach @ early, mid & late stage entrepreneurial ventures
- Since 2005 practicing **Strategic Thinking, Execution Planning** and the **One Page Strategic Execution Plan** across 5 continents, in 3 languages maximizing growth & scale at entrepreneurial ventures of every stage. Also helping Fortune 500's become more agile, innovative & obtain accelerated performance results.
- All the while providing Leadership Development & Organizational Effectiveness knowledge transfer that significantly helps companies move the needle

# A Strategy in a Day & The One Page Strategic Plan

*Because the execution of an idea is  
always more important than the  
brilliance of the thought*



[jc@jcduarte.com](mailto:jc@jcduarte.com)  
[@strategyguy](https://www.linkedin.com/in/jcduarte)  
[www.linkedin.com/in/jcduarte](https://www.linkedin.com/in/jcduarte)  
[www.thestrategyguysite.com](http://www.thestrategyguysite.com)