



Strategy Deployment,  
Portfolio Planning,  
& Organization Design  
...Oh My

**Something I'd like to try:**

**Result that is hoped for:**

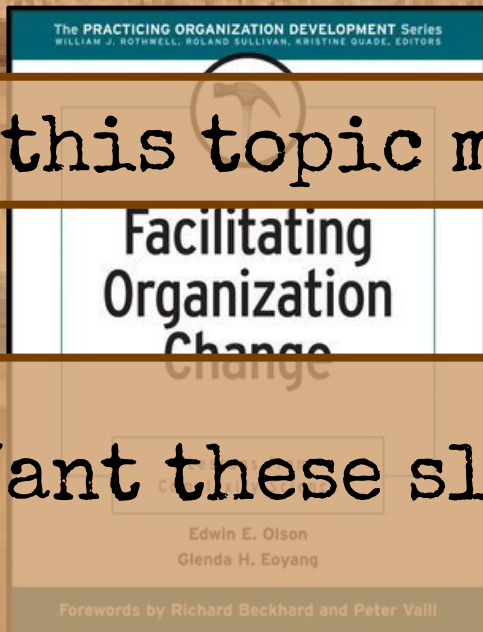
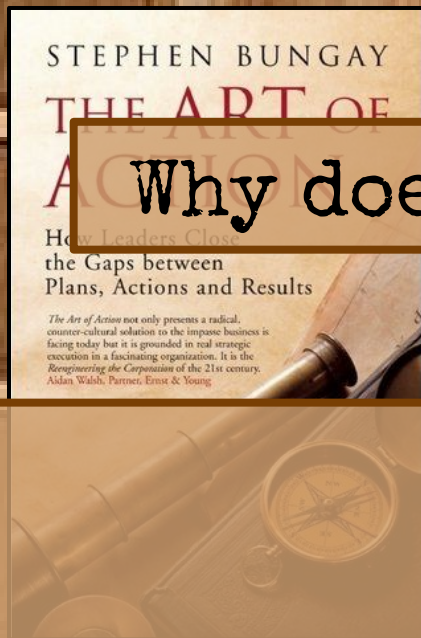
**Unblocked next step:**

**Who else could be involved:**





@mattbarcomb | #dsmagile



Why does this topic matter to you?

Want these slides?

Email: [info@IntentionallyAdaptive.com](mailto:info@IntentionallyAdaptive.com)

A photograph of a turtle on a sandy ground. The turtle is facing towards the bottom left of the frame. Its head is lowered, and its front legs are visible. The shell is a mix of brown and tan colors. Two text boxes are overlaid on the image: one at the top center containing the word 'Empowered?' and one at the bottom center containing the text 'Goal: Sense & respond from any position.'

# Empowered?

Goal: Sense & respond from any position.



Strategy  
Deployment

Portfolio  
Plan

Organization  
Design

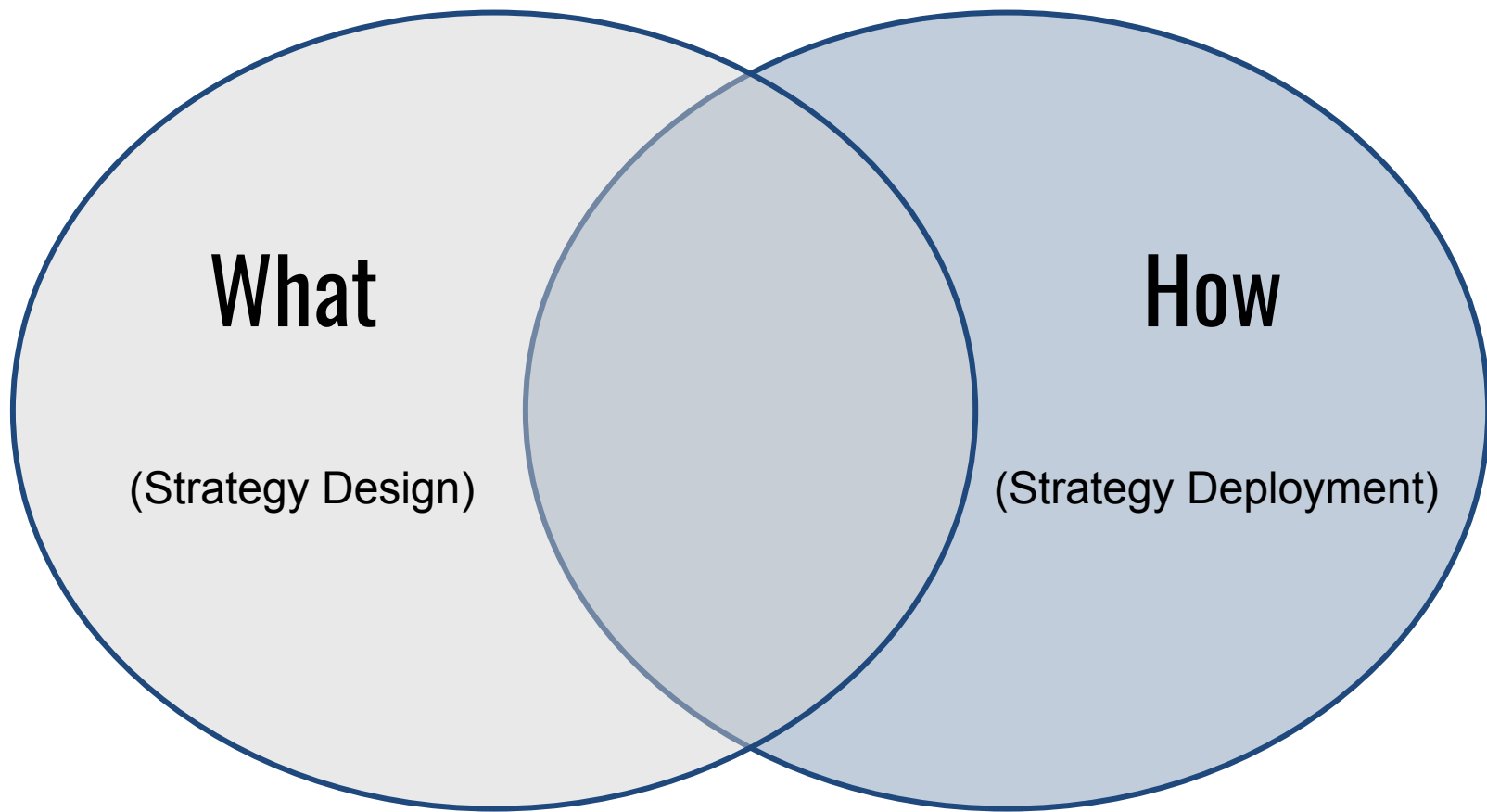


# Definition: Strategy Deployment

A communications & alignment technique.

Not strategy \*design\*.

“A well deployed strategy becomes a decision making framework that provides internal focus for external value creation.”



**What**

(Strategy Design)

**How**

(Strategy Deployment)

The diagram is a light blue pyramid with a dark blue outline, divided into three horizontal sections by two horizontal lines. Each section contains a title and two lines of descriptive text.

## **Strategic Intents**

1-3 initiatives  
3-5 years to achieve

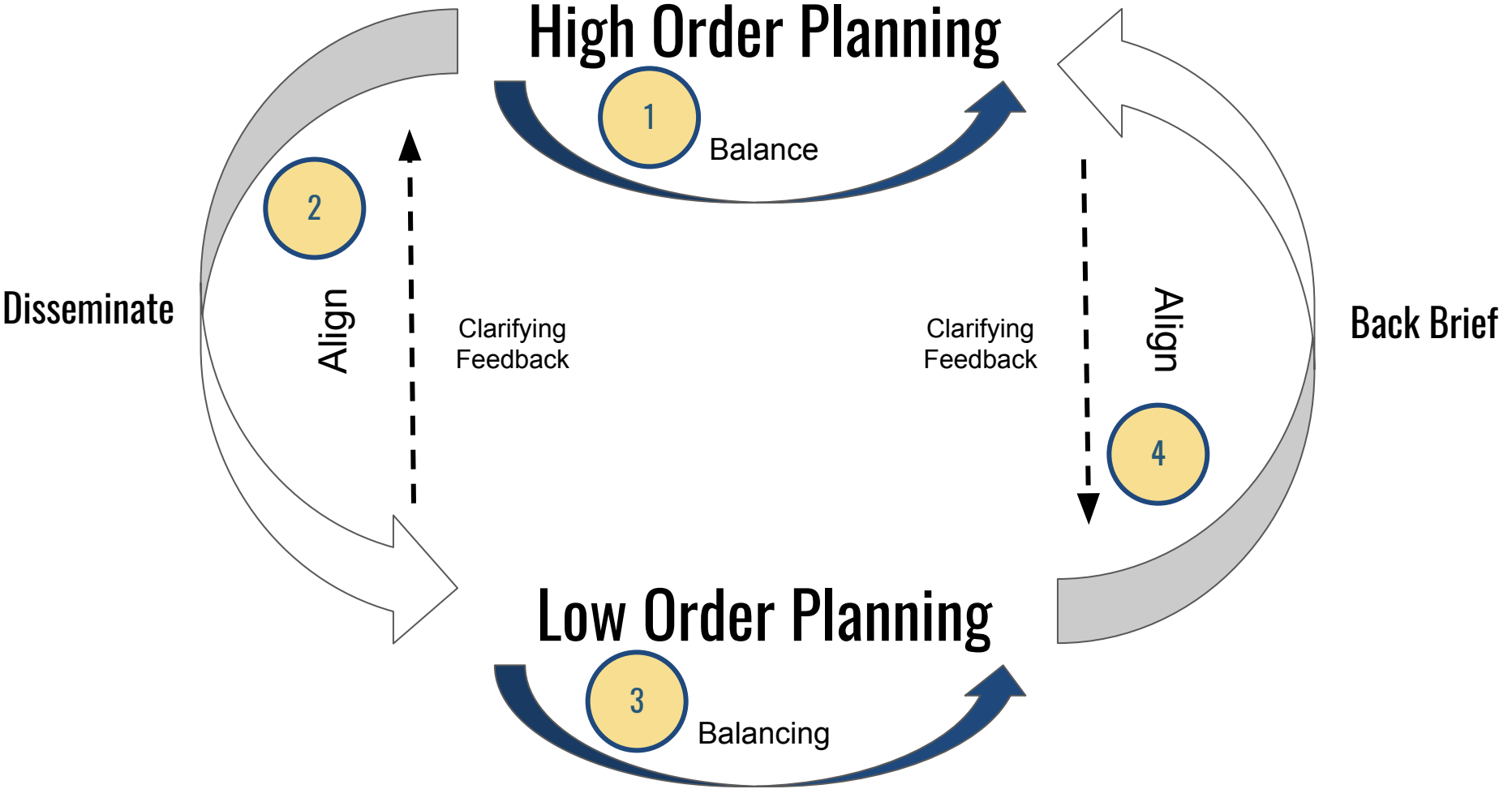
## **Operational Objectives**

1-3 objectives per organizational unit  
12-18 months to achieve

## **Tactical Activities**

1-3 prioritized items per front-line team  
4-12 weeks to achieve





## Definition: Portfolio Plan

A constrained capacity investment plan.

Not a list of  
hierarchical projects.

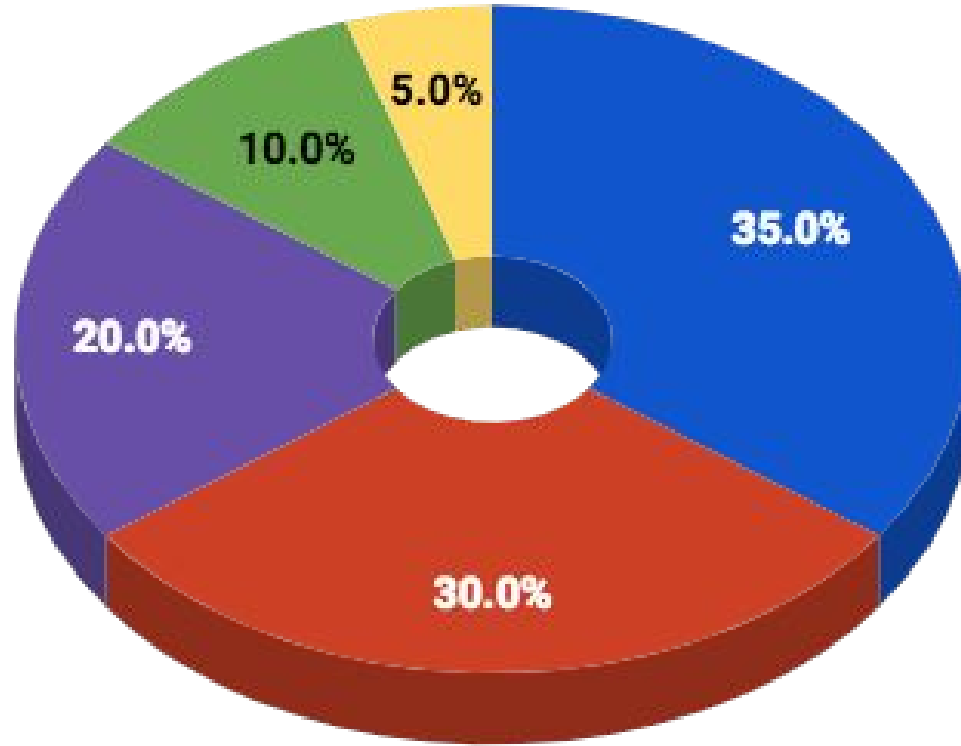
“Budgets for an organization’s products, services, and sustaining operations then allocates scarce resources to achieve measurable outcomes.”

# Basic Parts of any Budget





# Segments, Allocations, Options & Returns

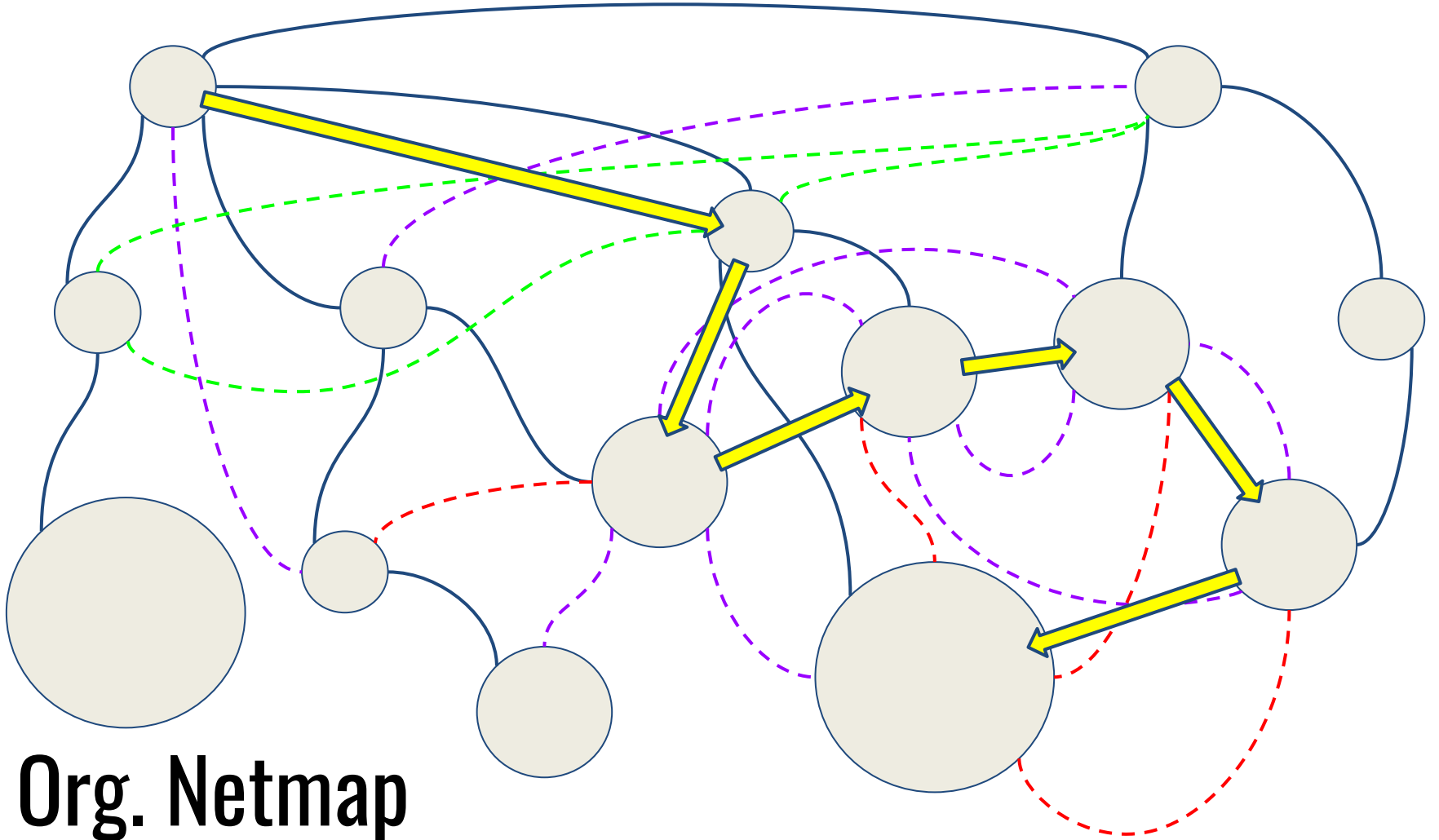


● Product A ● LOB 1 ● Value Stream ● Shared Service ● Exploration

# Definition: Organization Design

A subset of social systems design.

“Intentionally influencing a social system so that its processes and structures, both explicit and implicit, are better configured to achieve its desired outcomes.”





# How they interconnect

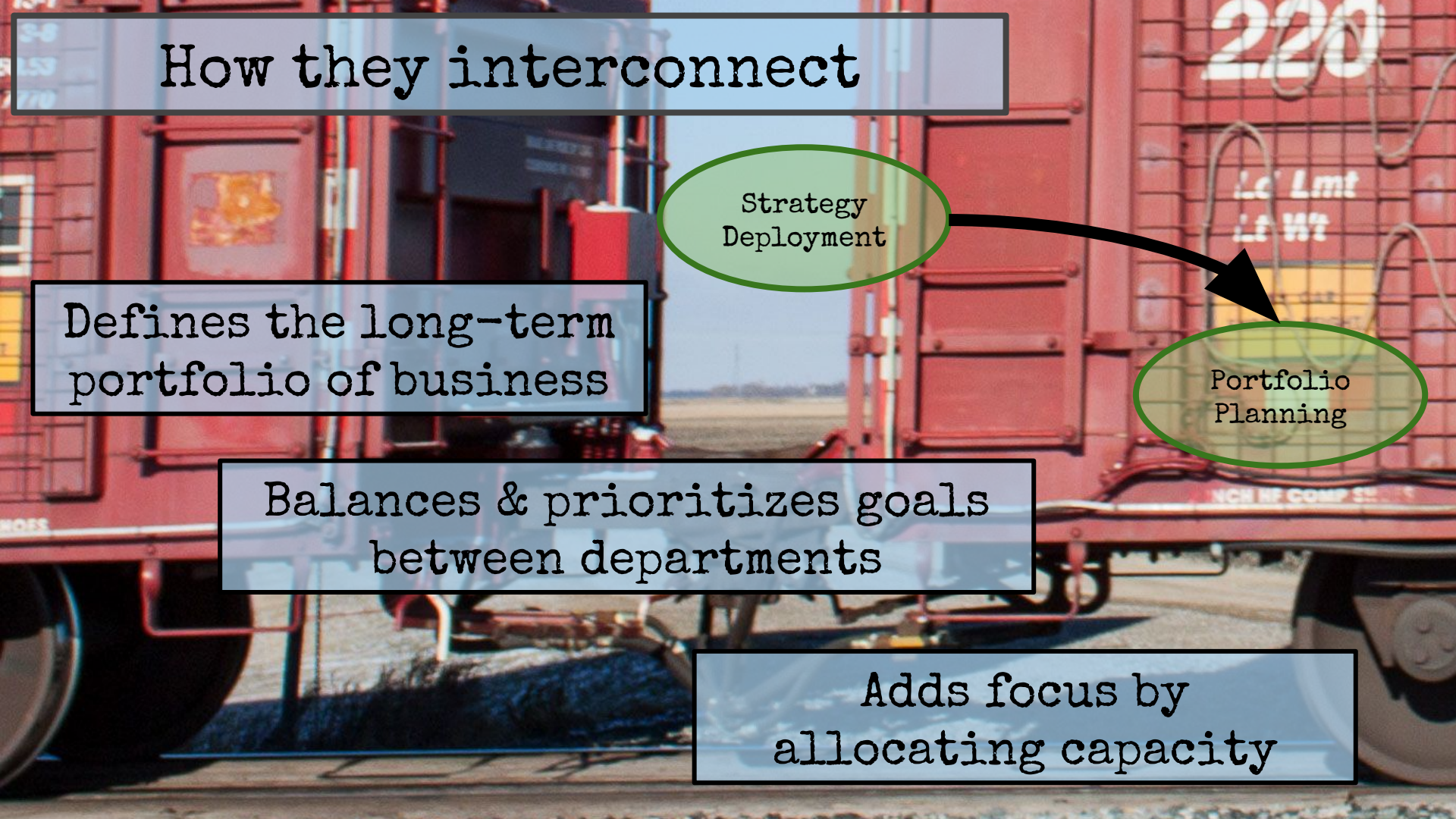
Strategy  
Deployment

Defines the long-term  
portfolio of business

Portfolio  
Planning

Balances & prioritizes goals  
between departments

Adds focus by  
allocating capacity



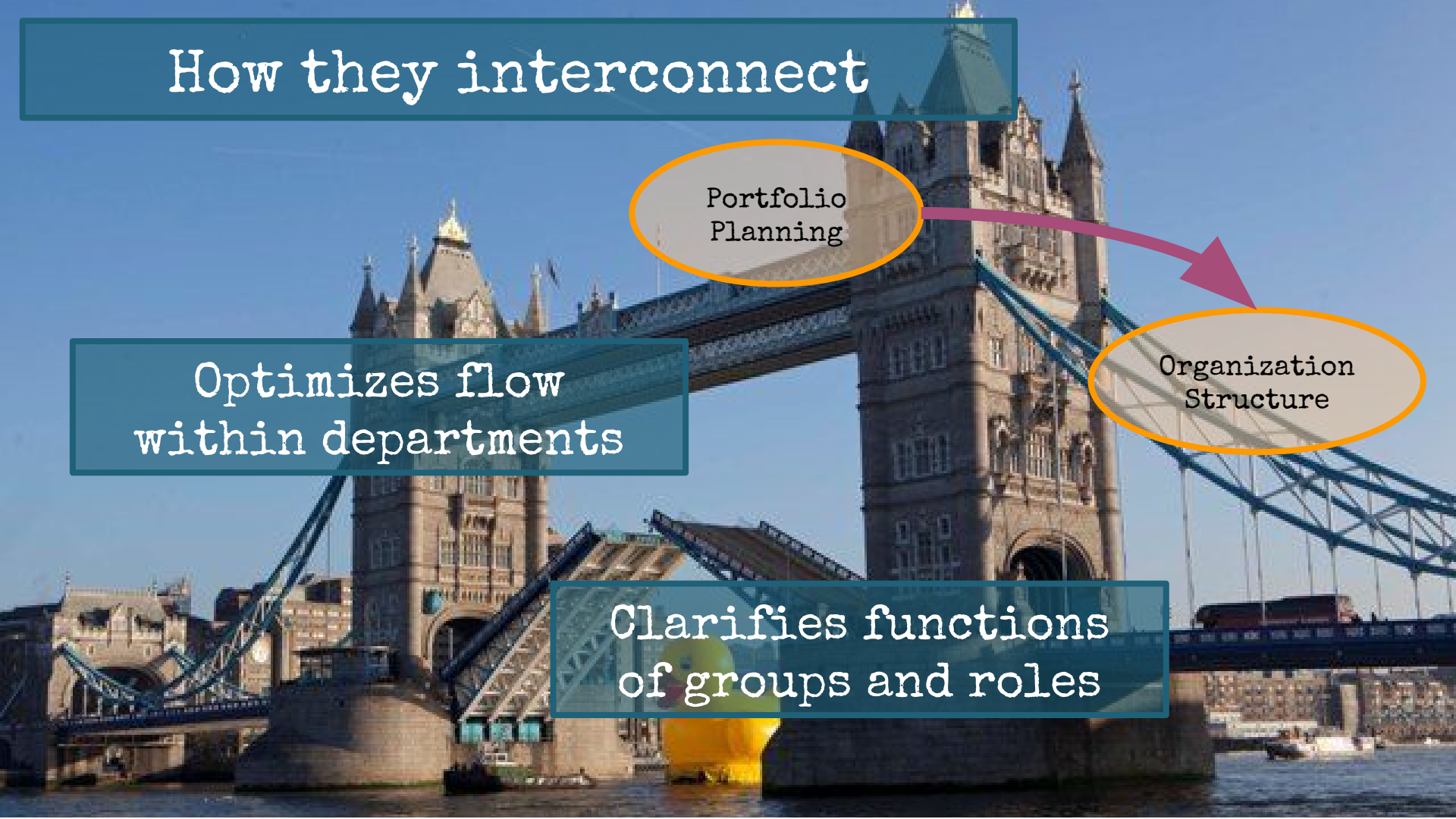
# How they interconnect

Portfolio  
Planning

Organization  
Structure

Optimizes flow  
within departments

Clarifies functions  
of groups and roles





# How they interconnect

Strategy  
Deployment

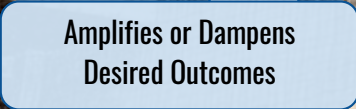
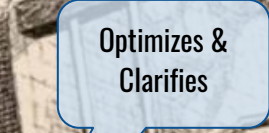
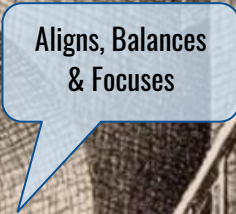
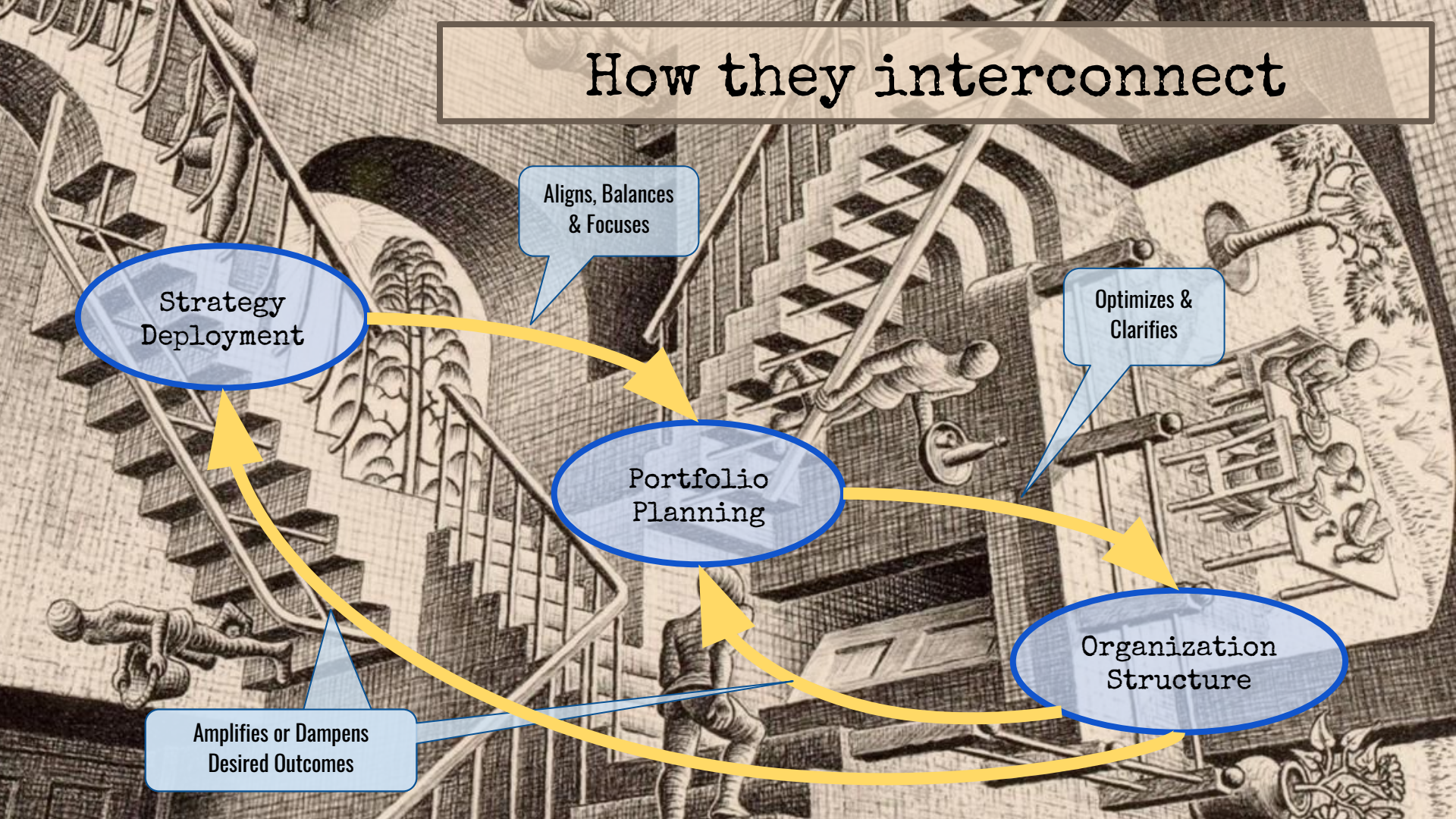
Aligns, Balances  
& Focuses

Optimizes &  
Clarifies

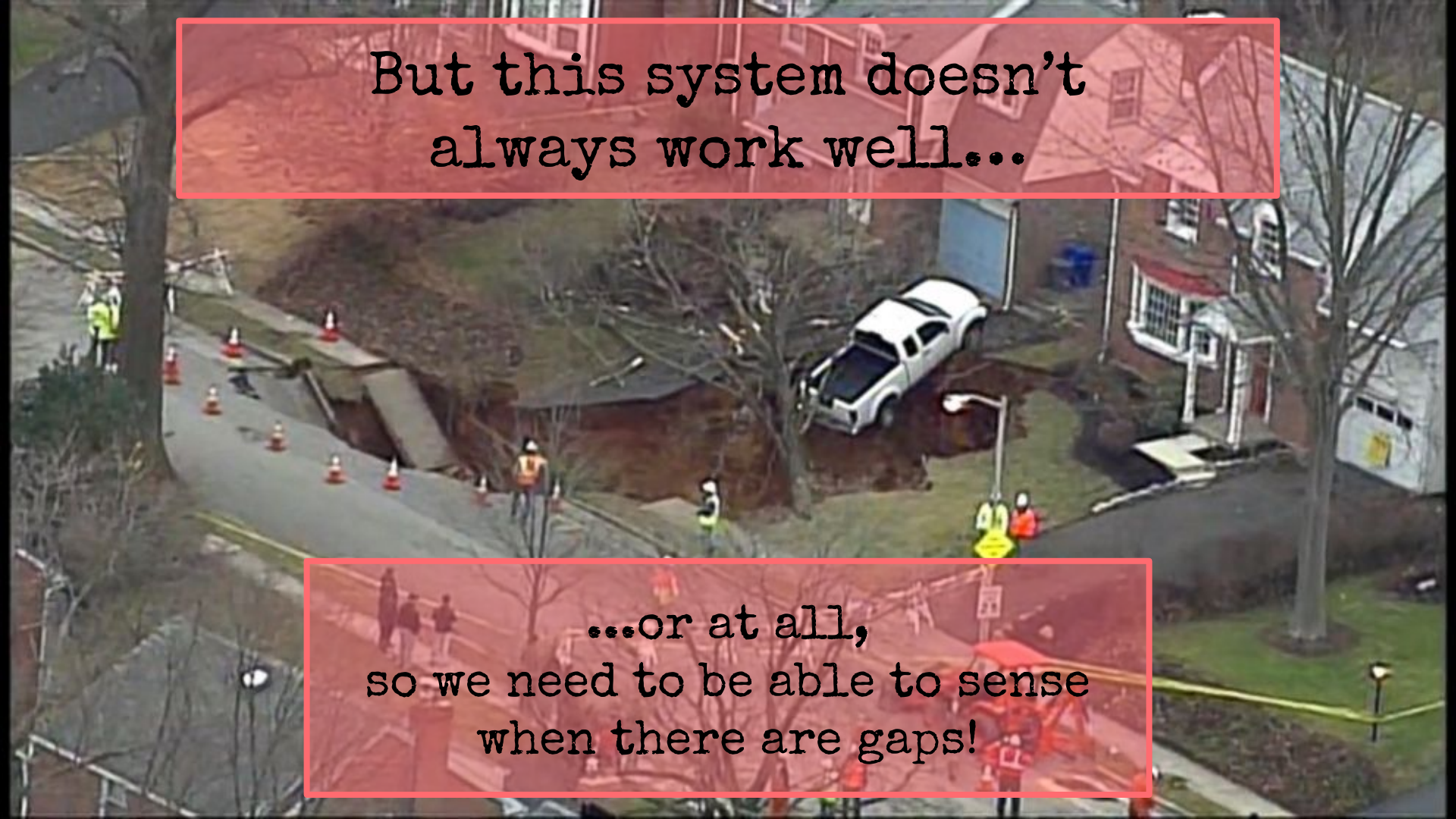
Portfolio  
Planning

Organization  
Structure

Amplifies or Dampens  
Desired Outcomes





An aerial photograph of a road construction site. A white pickup truck is parked on a dirt area next to a road. Several workers in high-visibility vests are visible around the site. Orange traffic cones are placed along the edge of the road. A large, dark, rectangular object, possibly a piece of machinery or a large container, is lying on the ground. The background shows residential buildings and trees.

But this system doesn't  
always work well...

...or at all,  
so we need to be able to sense  
when there are gaps!

A person wearing a purple long-sleeved shirt and blue jeans is walking on a paved surface. They are using a white cane with a red handle. The background is a light-colored wall with some greenery at the base.

# Sensing gaps in Strategy Deployment

Do you grok the “rally cry”?

Can you trace your work?

Cross-project multitasking?



# Sensing gaps in Portfolio Planning

Bottom-up estimated budgets?

Project-oriented funding?

Clear priorities for  
shared resources?



A person is rock climbing on a reddish-brown rock face. The climber is wearing a white long-sleeved shirt, dark pants, and a white helmet. They are positioned vertically, with their arms extended upwards, gripping the rock. The background is a textured, reddish-brown rock surface with some cracks and shadows.

# Sensing gaps in Organization Design

Too much higher-up approval?

Too many hand-offs?

Blame masked as accountability?



The background image shows a park scene with a river, a bench, and a fence. The text is overlaid on this image in green boxes.

But what can you do?

Visualize work alignment

Visualize value of work

Visualize flow of value

Measure impacts on work & flow



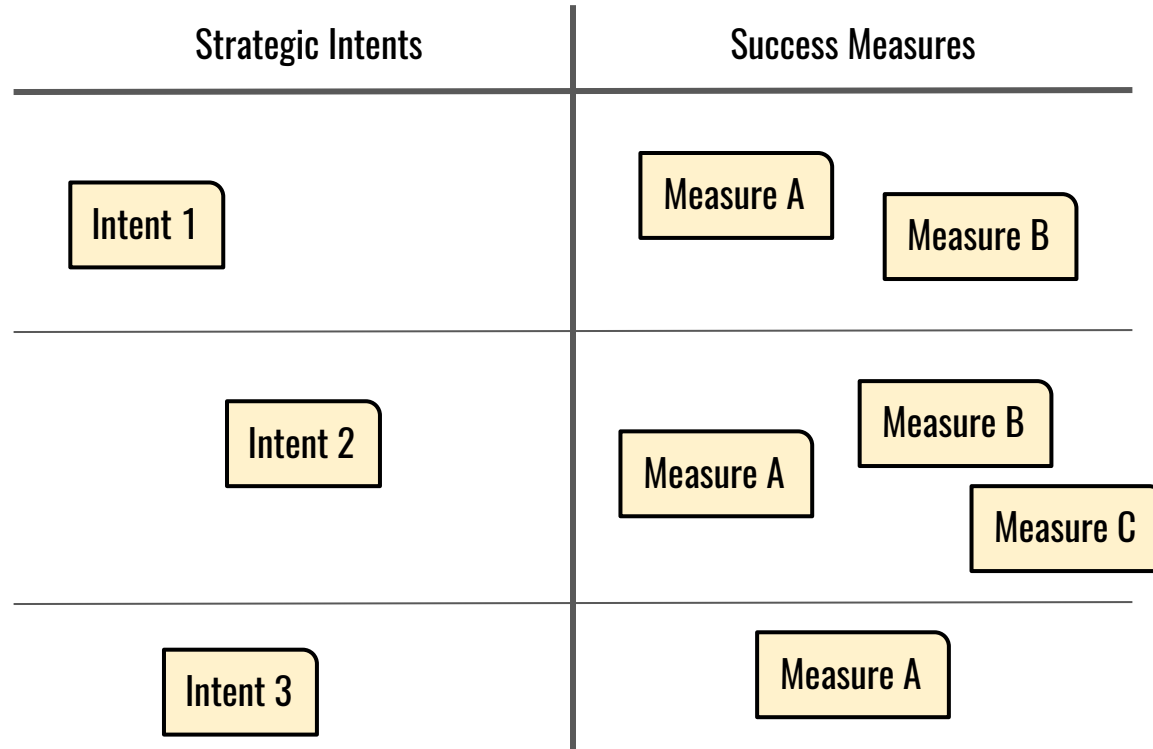
Visualize work alignment

Strategic intents with measures

Strength of work alignment

Show you don't know!

# Intents & Measures



# Strength of Alignment

- None
- Weak
- Partial
- Strong

	Intent 1		Intent 2			Intent 3
Your work	Measure A	Measure B	Measure A	Measure B	Measure C	Measure A
MVP	None	Weak	None	None	Partial	Weak
Project	Weak	None	Strong	Partial	Strong	Weak
Feature	Strong	Strong	Partial	Partial	Weak	Strong
Initiative	???		???			???



A man and a woman are standing in a warehouse filled with stacks of cash. The woman is on the left, wearing a dark denim shirt and dark pants. The man is on the right, wearing a blue and white striped shirt and dark pants. They are standing in front of a large stack of cash that is piled up on the floor. The background is a corrugated metal wall.

Visualize value of work

Create simple charters

Show Cost of Delay

Assign ranked priority

# A simple charter canvas

Working name:

Important Date:

Top 3 people that care:

1)

2)

3)

The main problems they have:

Risky assumptions:

Value prop for you:

Others involved:

A brief pitch:

# Cost of Delay & Priority

	Your work	Cost of Delay	Yelp Value
1)	MVP	X dollars / year	\$\$\$\$\$
2)	Project	Y subscriptions / month	\$\$\$\$\$
3)	Feature	Z referrals / quarter	\$\$\$\$\$
4)	Initiative	???	\$\$\$\$\$



Visualize flow of value

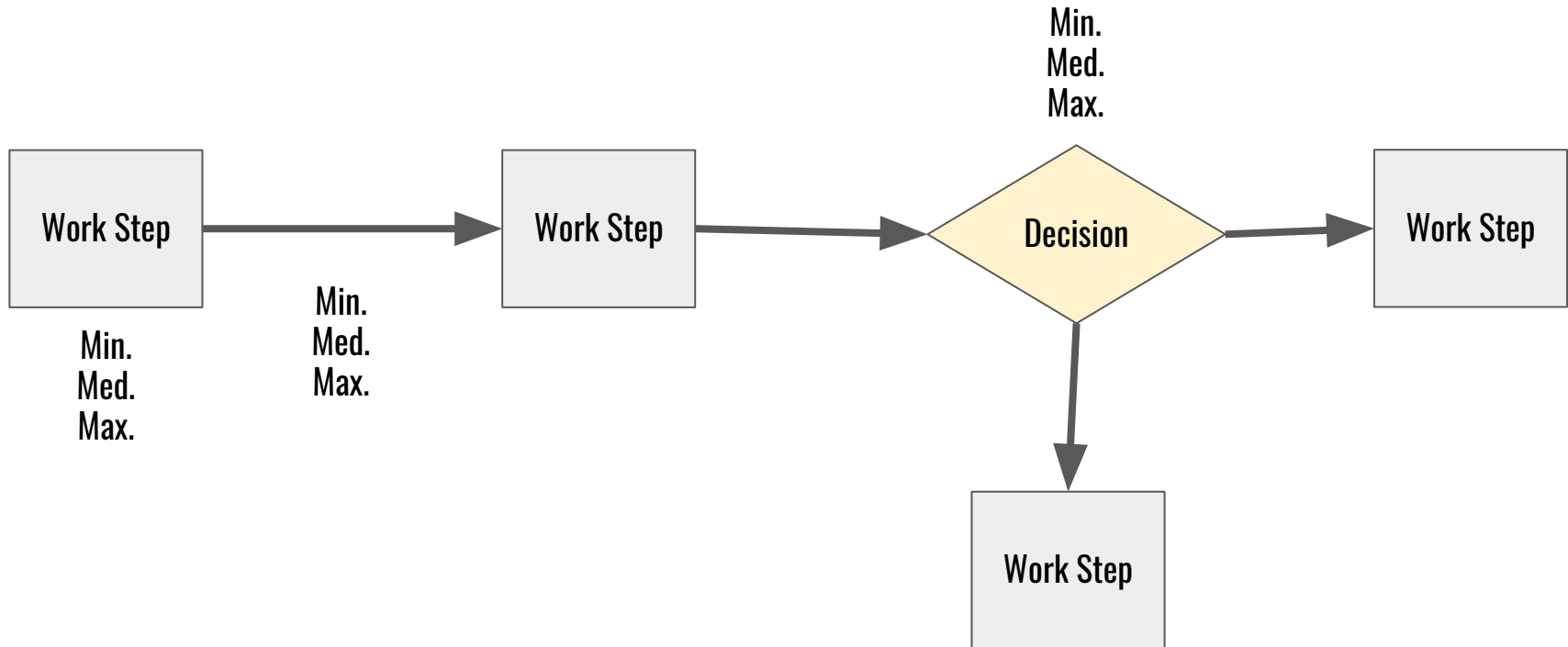
Show wait/queues & times

Show non-value add activities

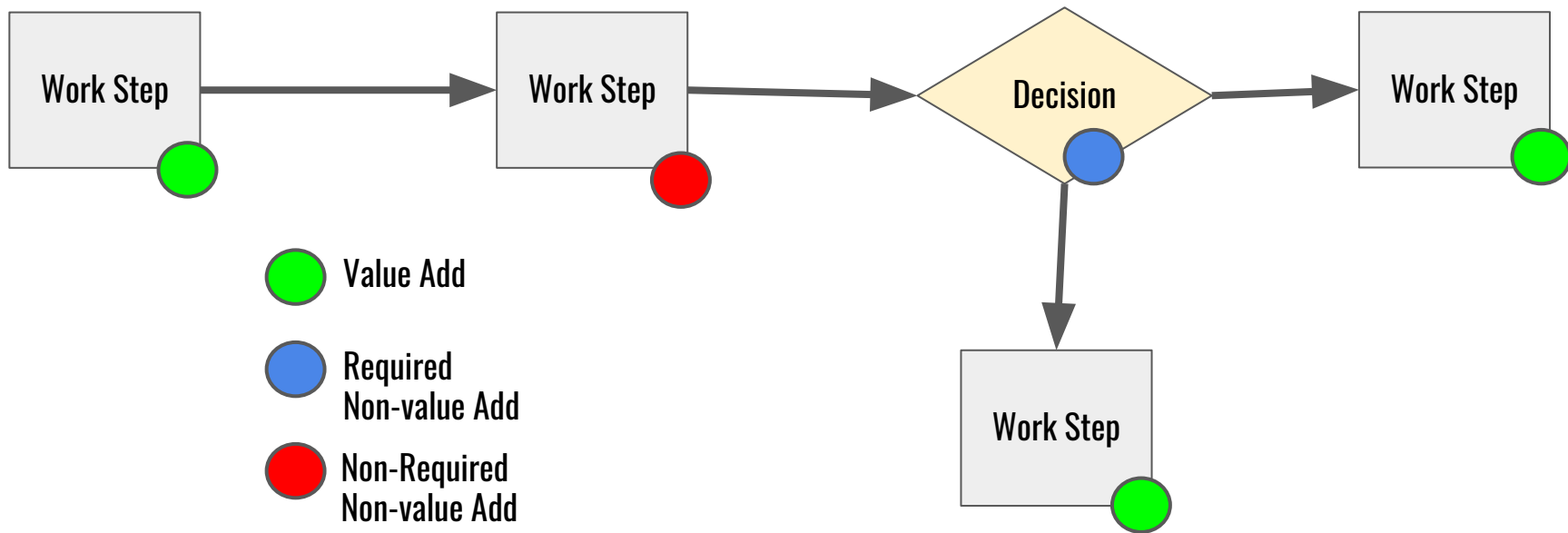
Find “swirlies of doom”



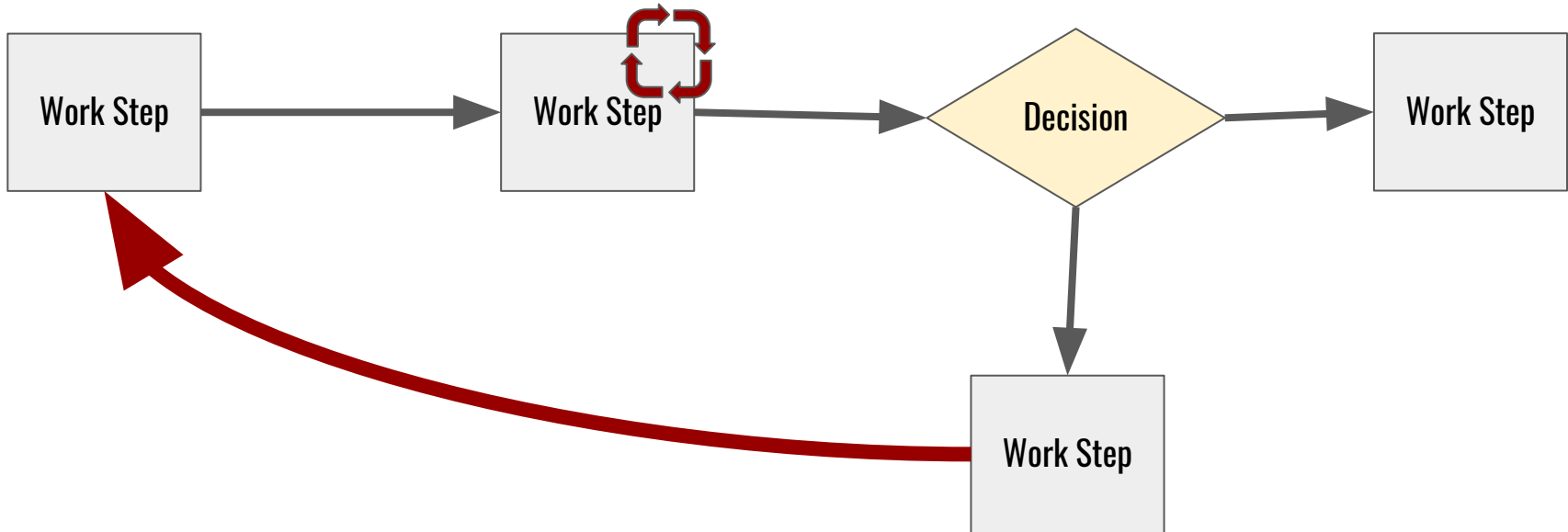
# Show wait/queues & times



# Show non-value add activities



Find “swirlies of doom”





Measure impacts on work & flow

Capacity Usage

Impediment Impact

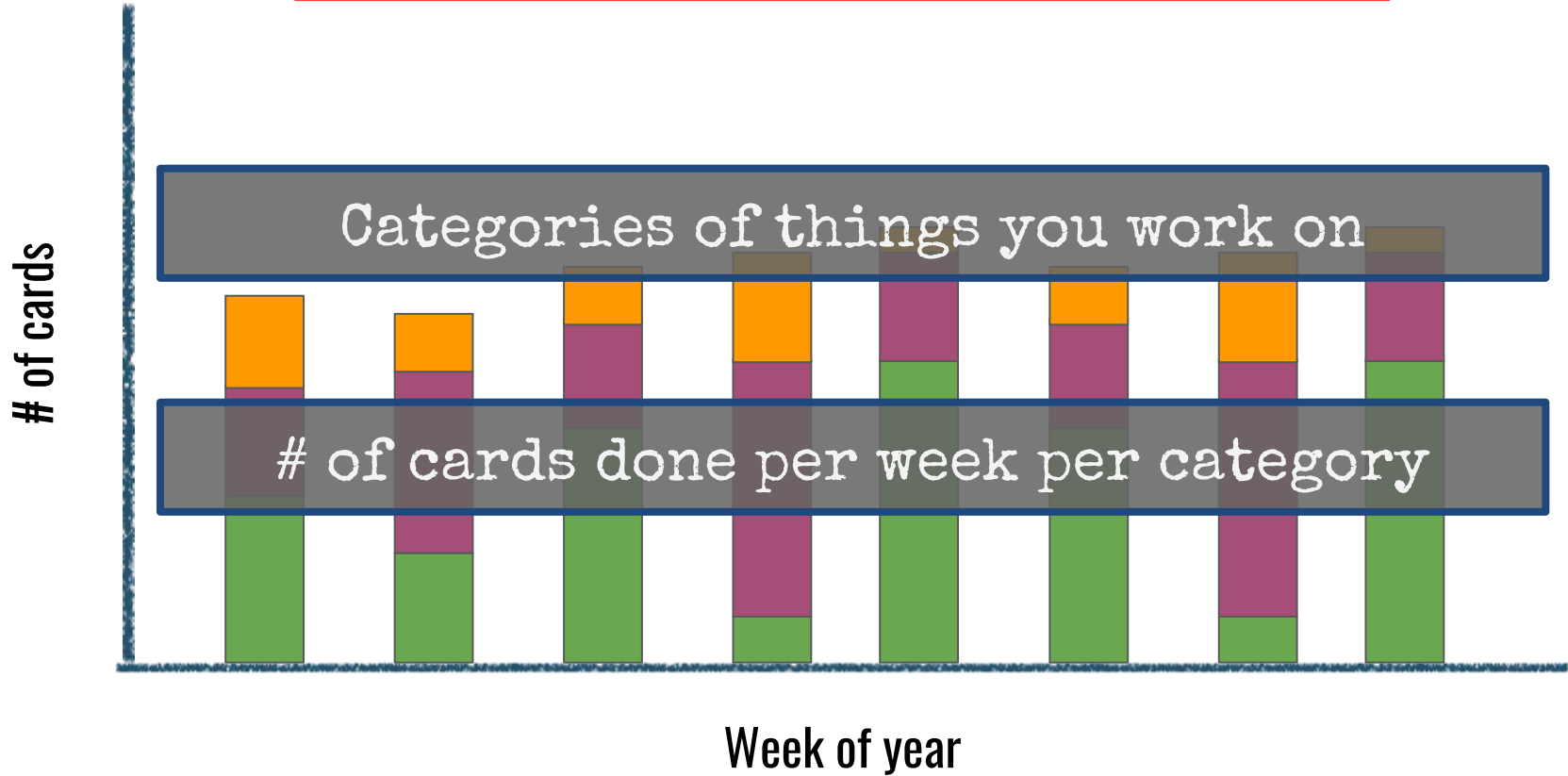
Cycle Time Frequency

Probabilistic Forecasting

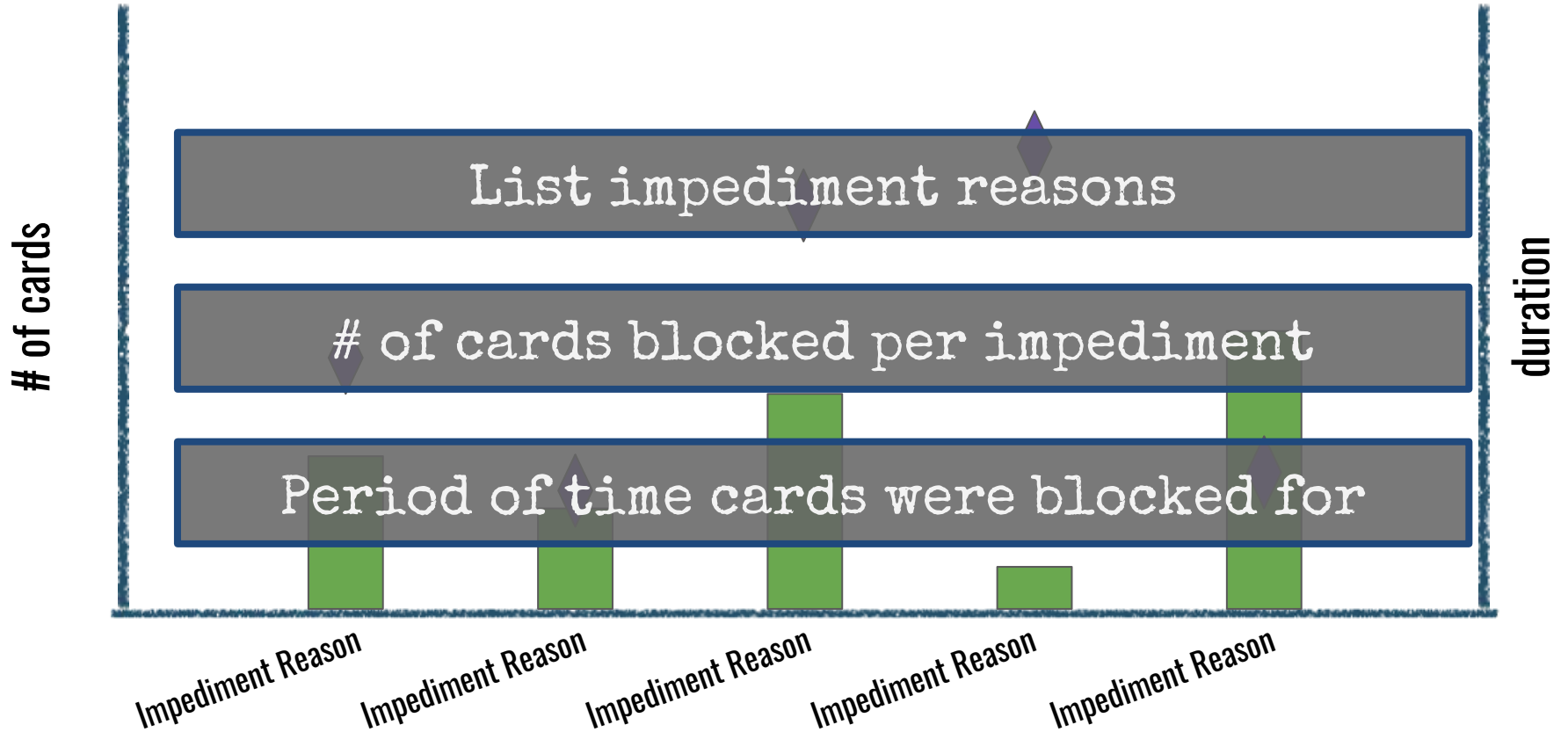
Process Cycle Efficiency



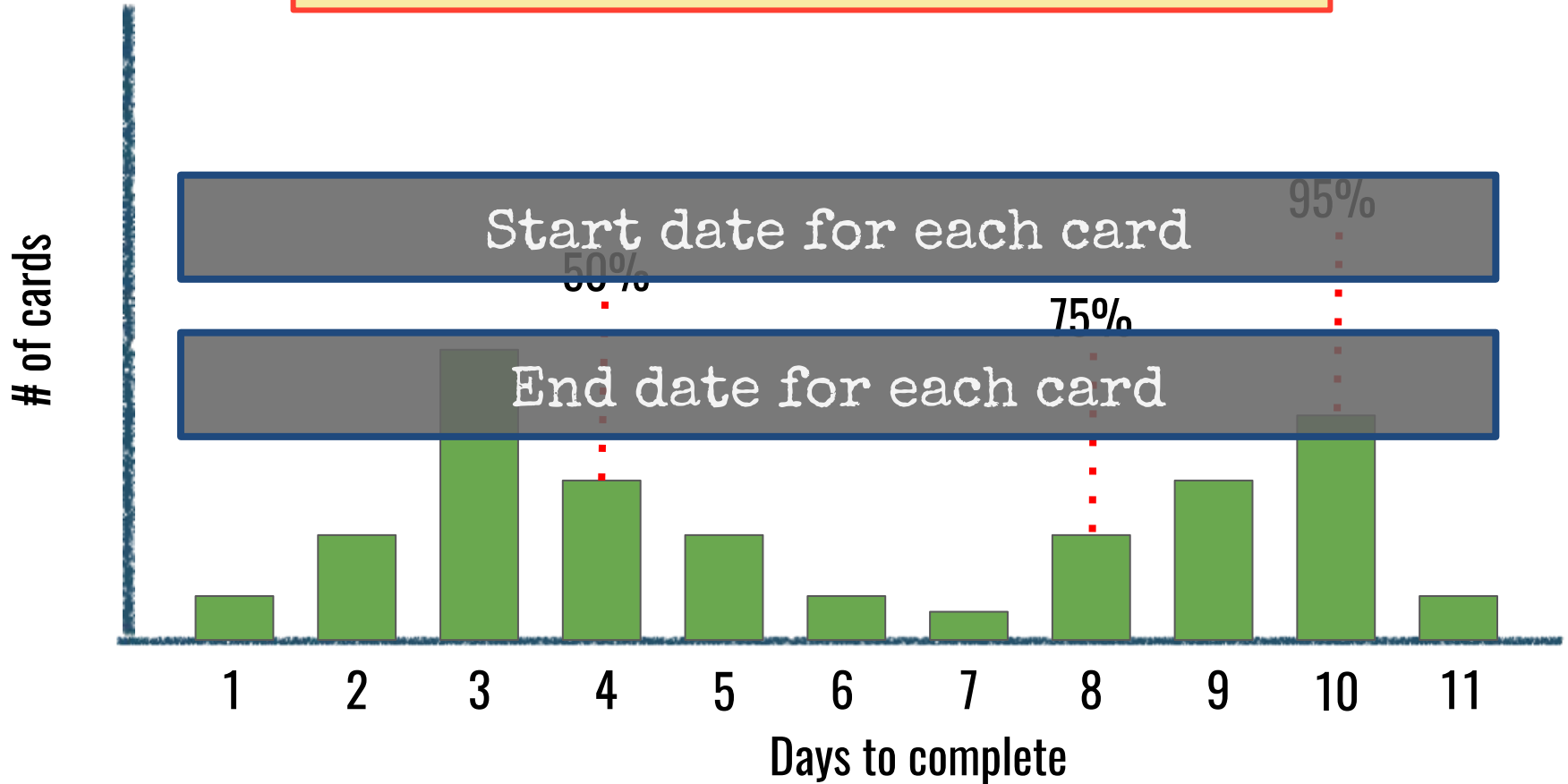
# Capacity Usage



# Impediment Impact



# Cycle Time Frequency



# Probabilistic Forecasting

## Forecast Com

1. Start Date

8/1/17

Focused Objective

forecasting - risk - staff - cost of delay

# of cards done each week

MOST POPULAR

AGILE CHEAT SHEETS

ALL OUR FREE STUFF ON GITHUB

BOOKS AND PUBLICATIONS

CONFERENCE

## Results

Likelihood	Duration in Sprint (3 week)'s	Date
100%	12	4/10/18
95%	10	2/27/18
90%	10	2/27/18
85%	10	2/27/18
80%	9	2/6/18
75%	9	2/6/18
70%	9	2/6/18
65%	8	1/16/18
60%	8	1/16/18
55%	8	1/16/18
50%	8	1/16/18
45%	8	1/16/18
40%	7	12/26/17
35%	7	12/26/17
30%	7	12/26/17
25%	7	12/26/17
20%	7	12/26/17
15%	6	12/5/17
10%	6	12/5/17
5%	5	11/14/17
0%	5	11/14/17

Almost certain

Somewhat certain

Less than coin-toss odds. But if you are game?

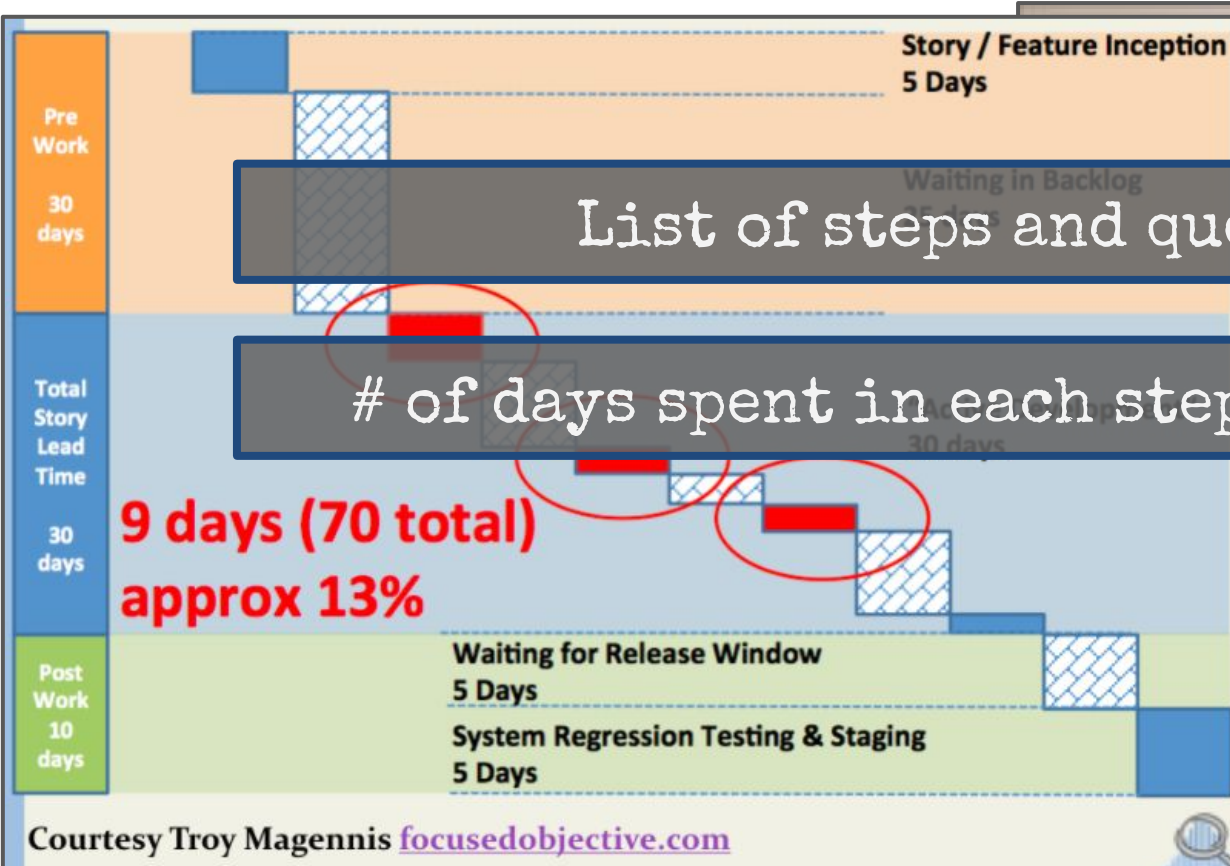
Use historical throughput data OR enter a low and high

Low guess

20

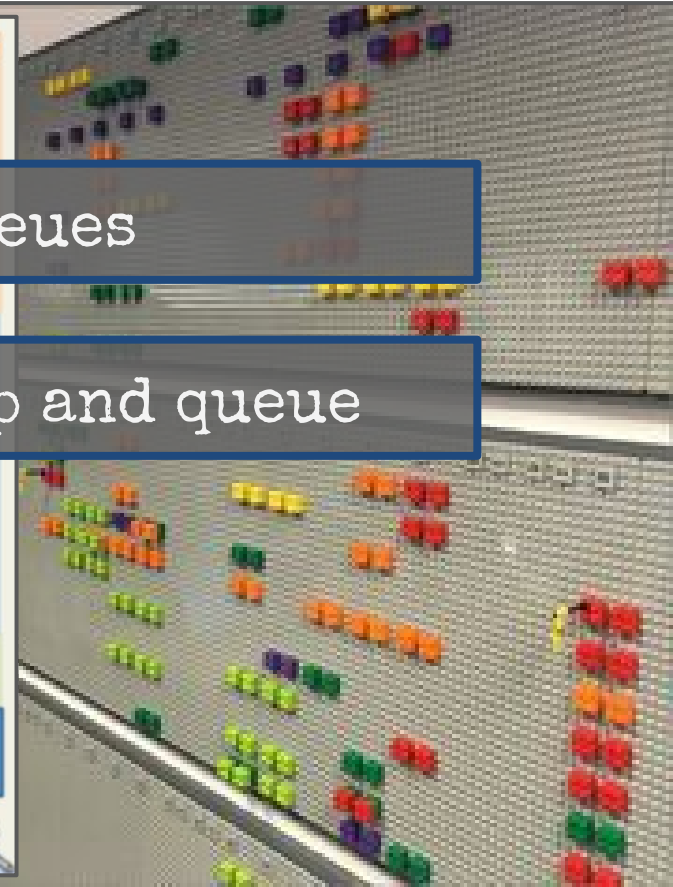


# Process Cycle Efficiency



List of steps and queues

# of days spent in each step and queue



# In summary...

Strategy deployment, portfolio planning & organization design create a system that can provide alignment, balance, focus, optimization & clarification to a business...but tends to not work well.

Gaps can be sensed through numerous downstream impacts such as multi-tasking, unclear priorities, too many hand-offs and a blame culture.

You can influence change by visualizing alignment, value, and flow of work as well as measuring impacts on work and flow.

## Stay In Touch?

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