Strategy Deployment,
Portfolio Planning,
& Organization Design
...Oh My
@mattbarcomb / #dsmagile
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Something I'd like to try:

Result that is hoped for:

Unblocked next step:

Who else could be involved:

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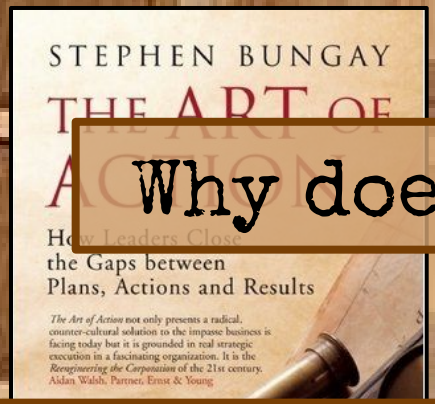


Why does this topic matter to you?

Want these slides?

Email: info@IntentionallyAdaptive.com

Empowered?
Goal: Sense & respond from any position.

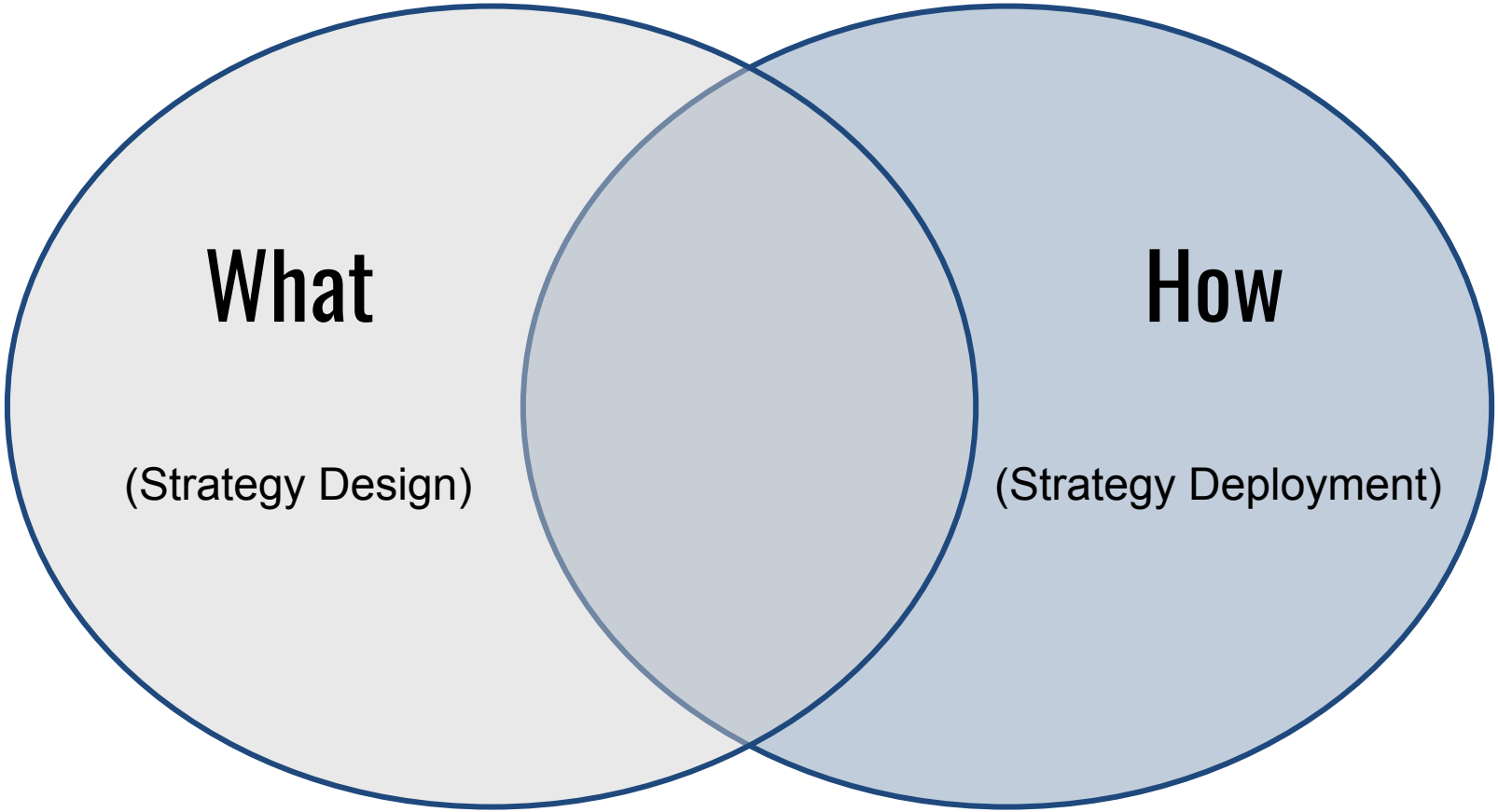
Strategy Deployment
Portfolio Plan
Organization Design

Definition: Strategy Deployment

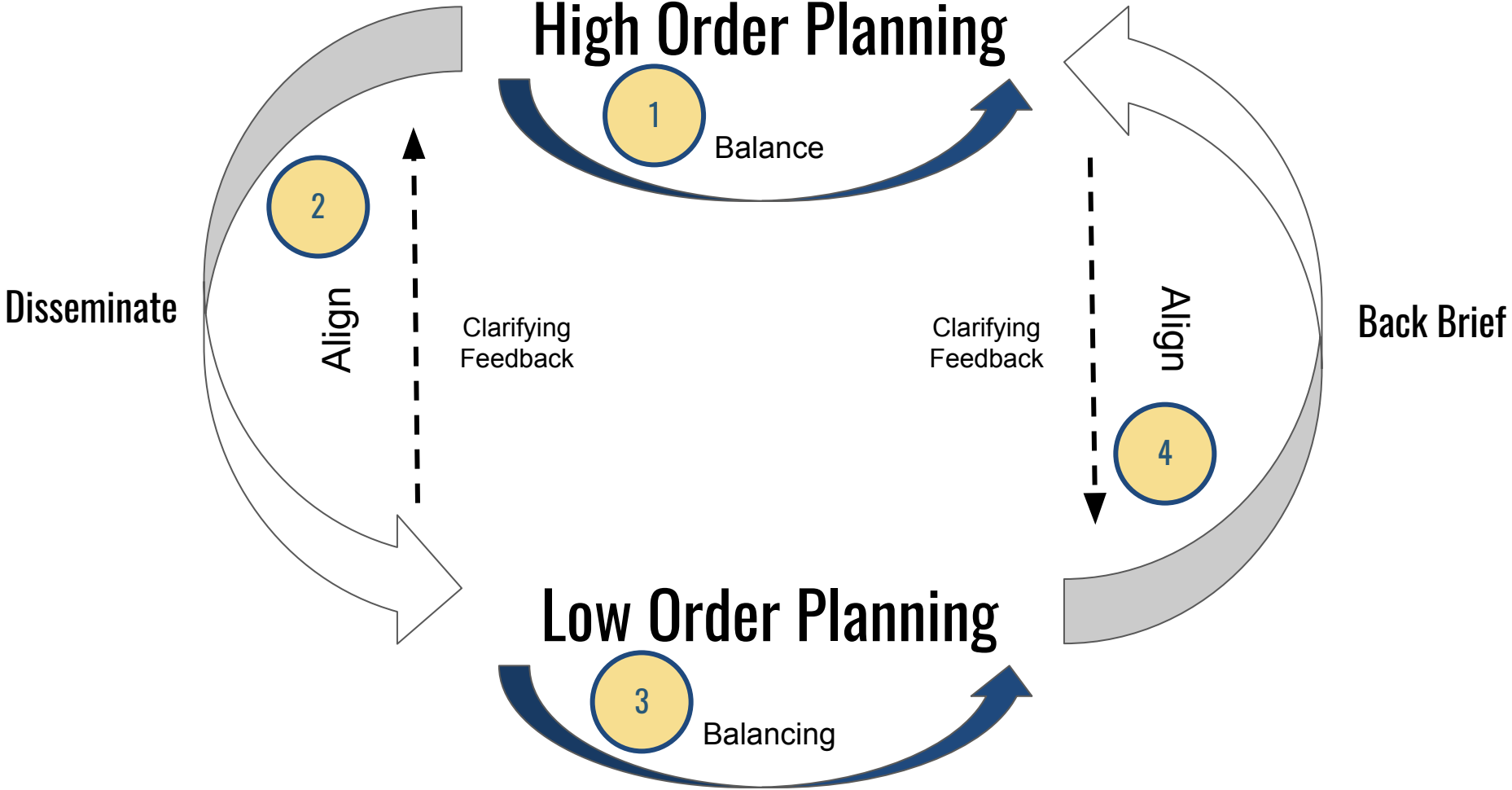
A communications & alignment technique.

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)

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


High Order Planning
1
Balance
2
Disseminate
Align
Clarifying Feedback
Clarifying Feedback
Align
Back Brief
4
Low Order Planning
3
Balancing

Definition: Portfolio Plan

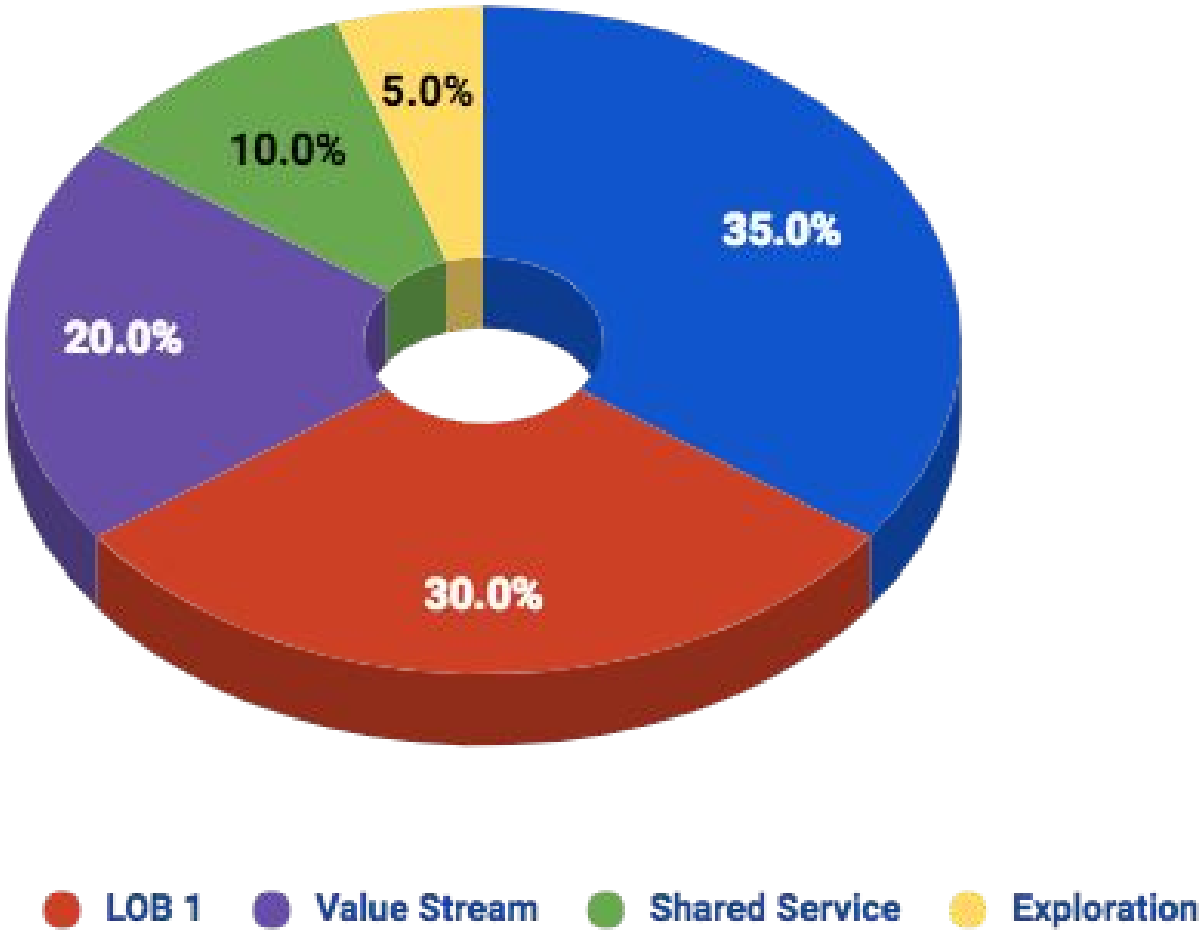
A constrained capacity investment plan.

Not a list of hierarchial projects.

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

Basic Parts of any Budget

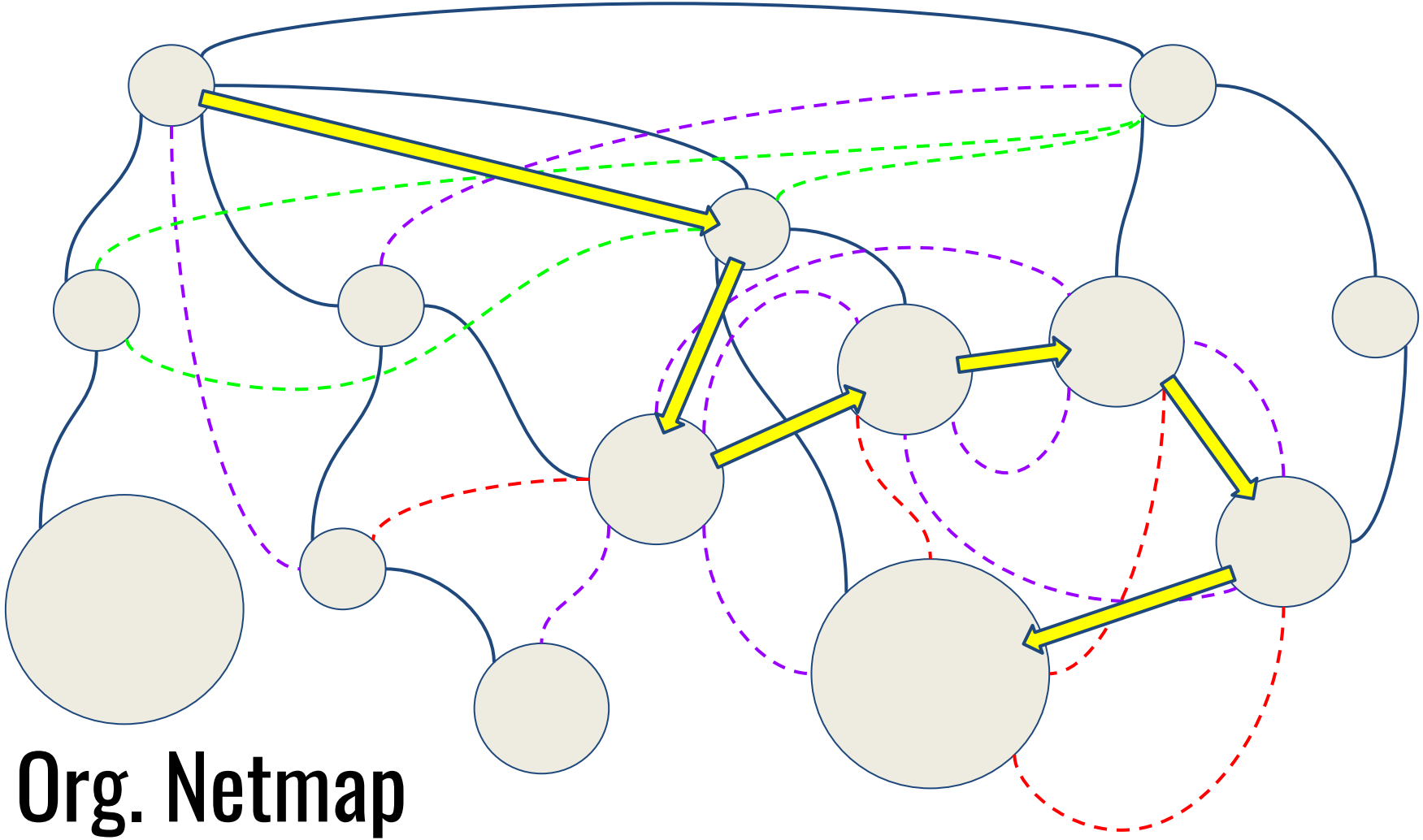
Segments, Allocations, Options & Returns



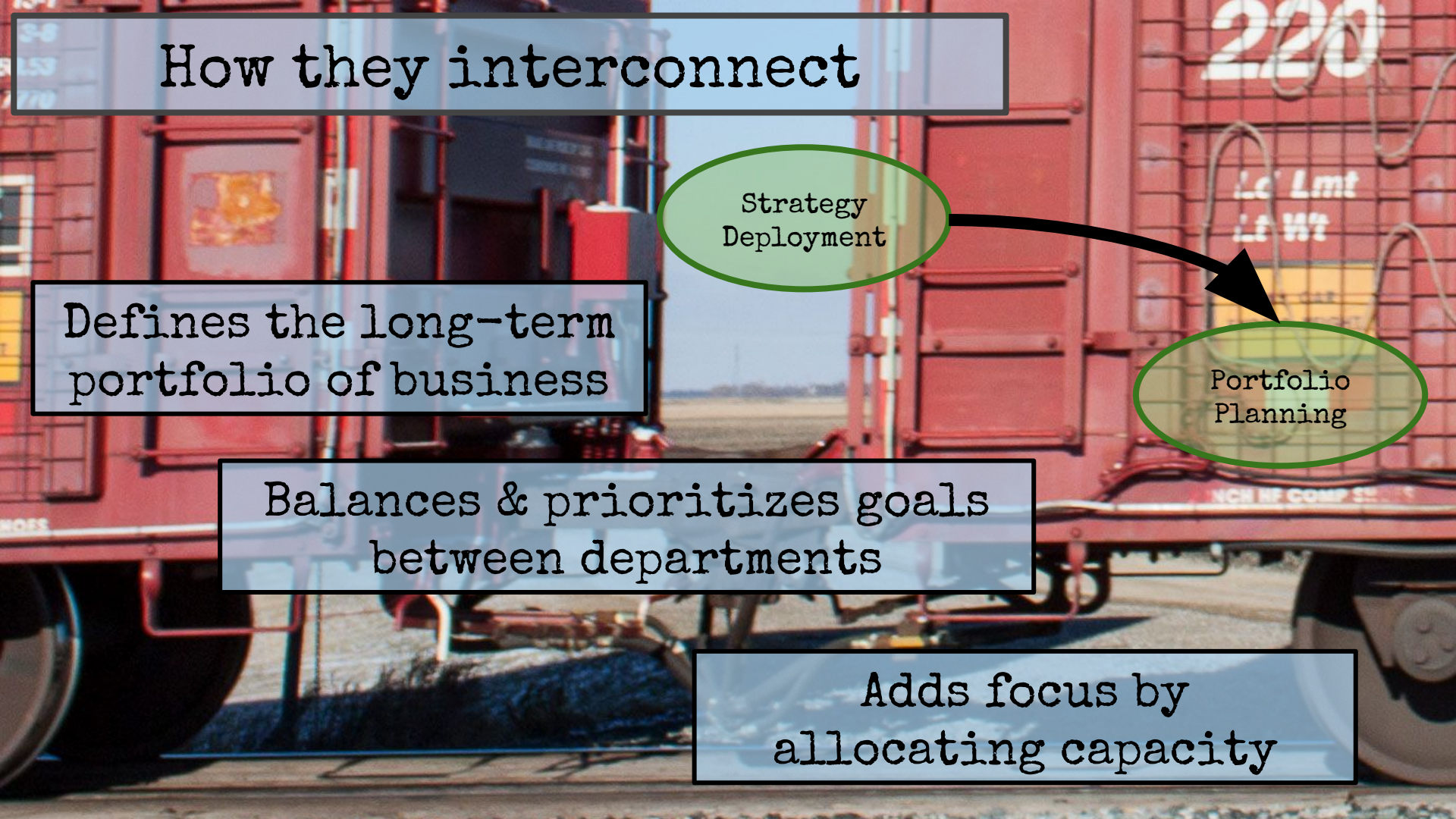
Definition: Organization Design

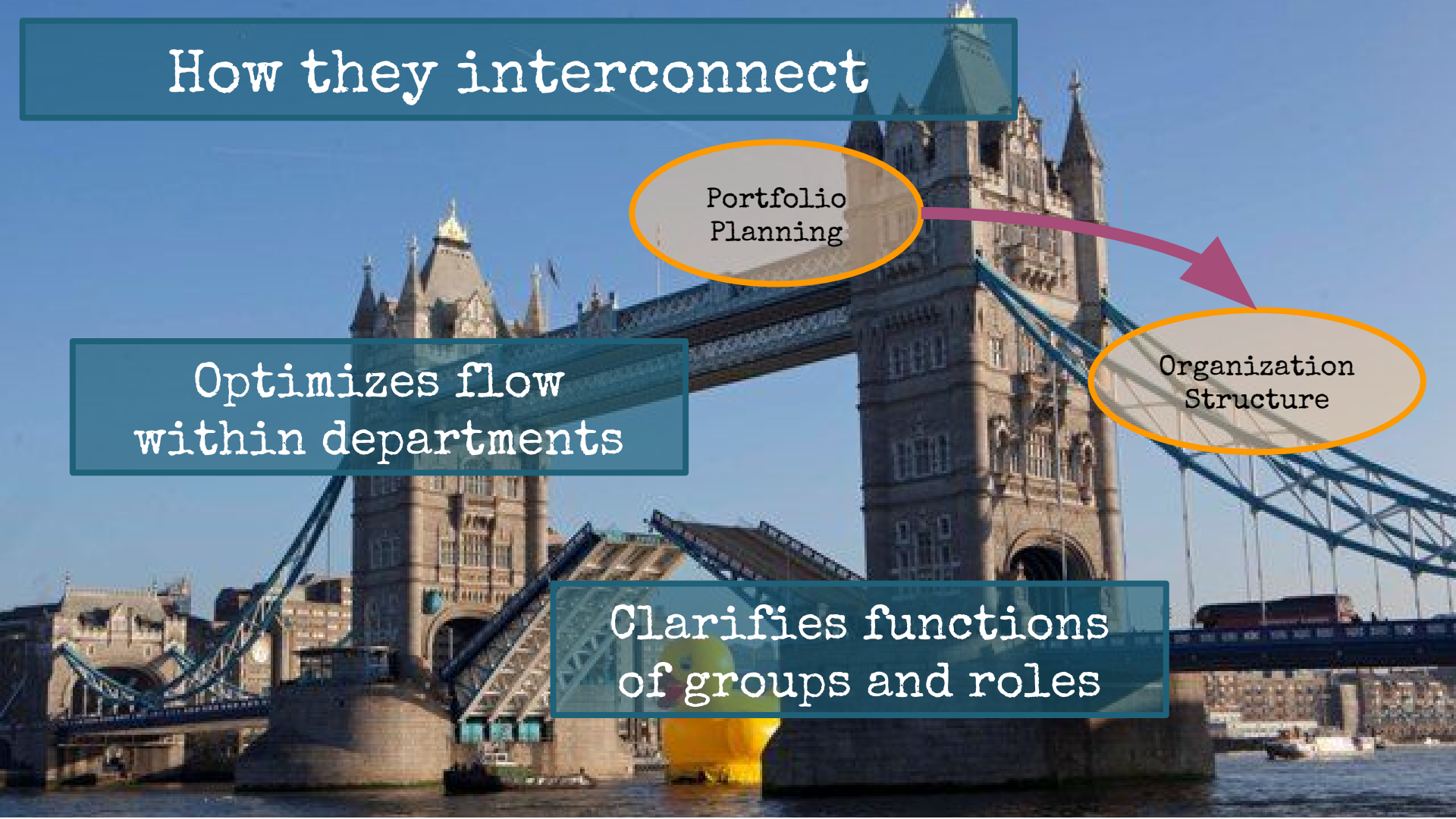
A subset of social systems design.

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

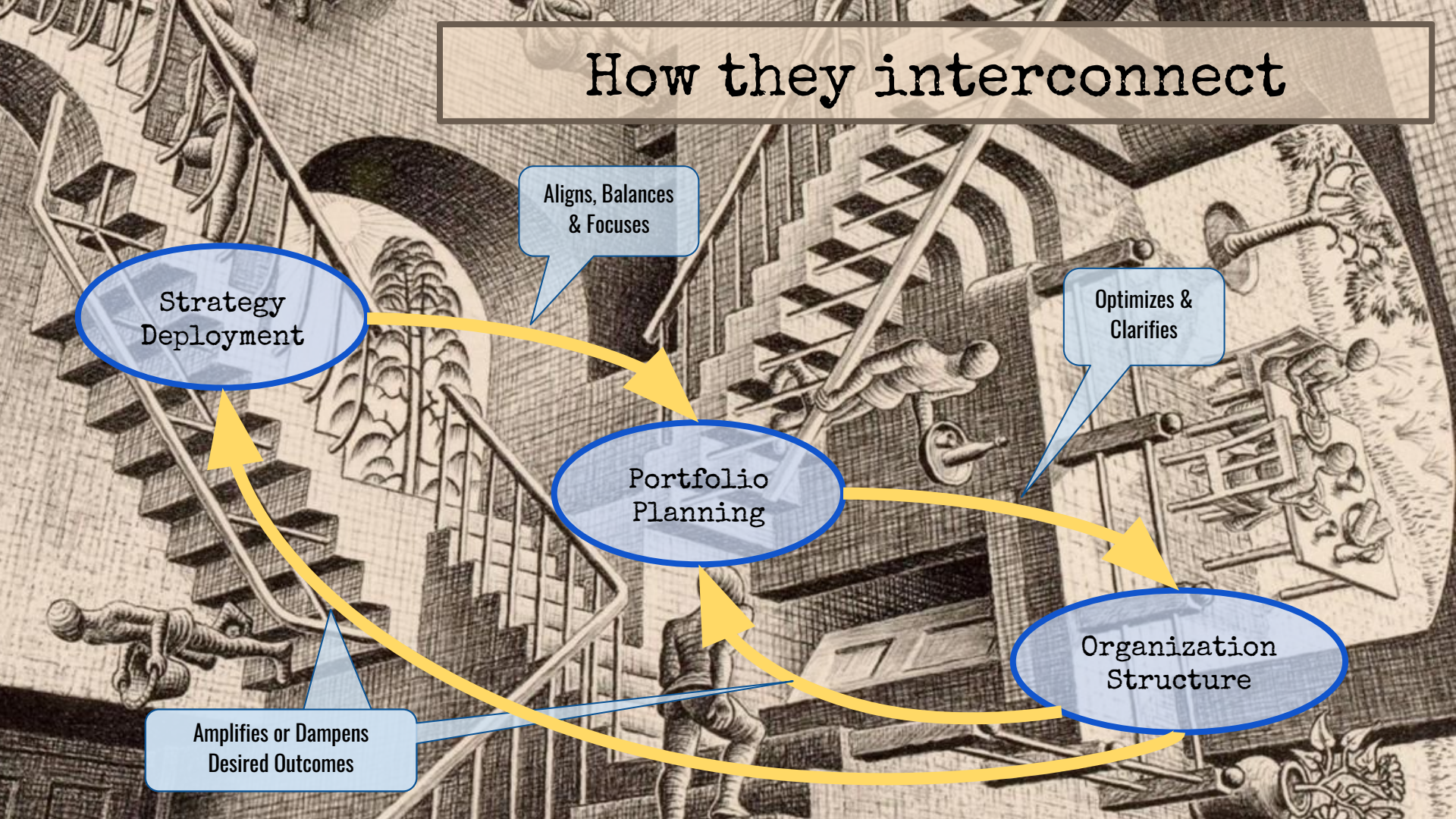


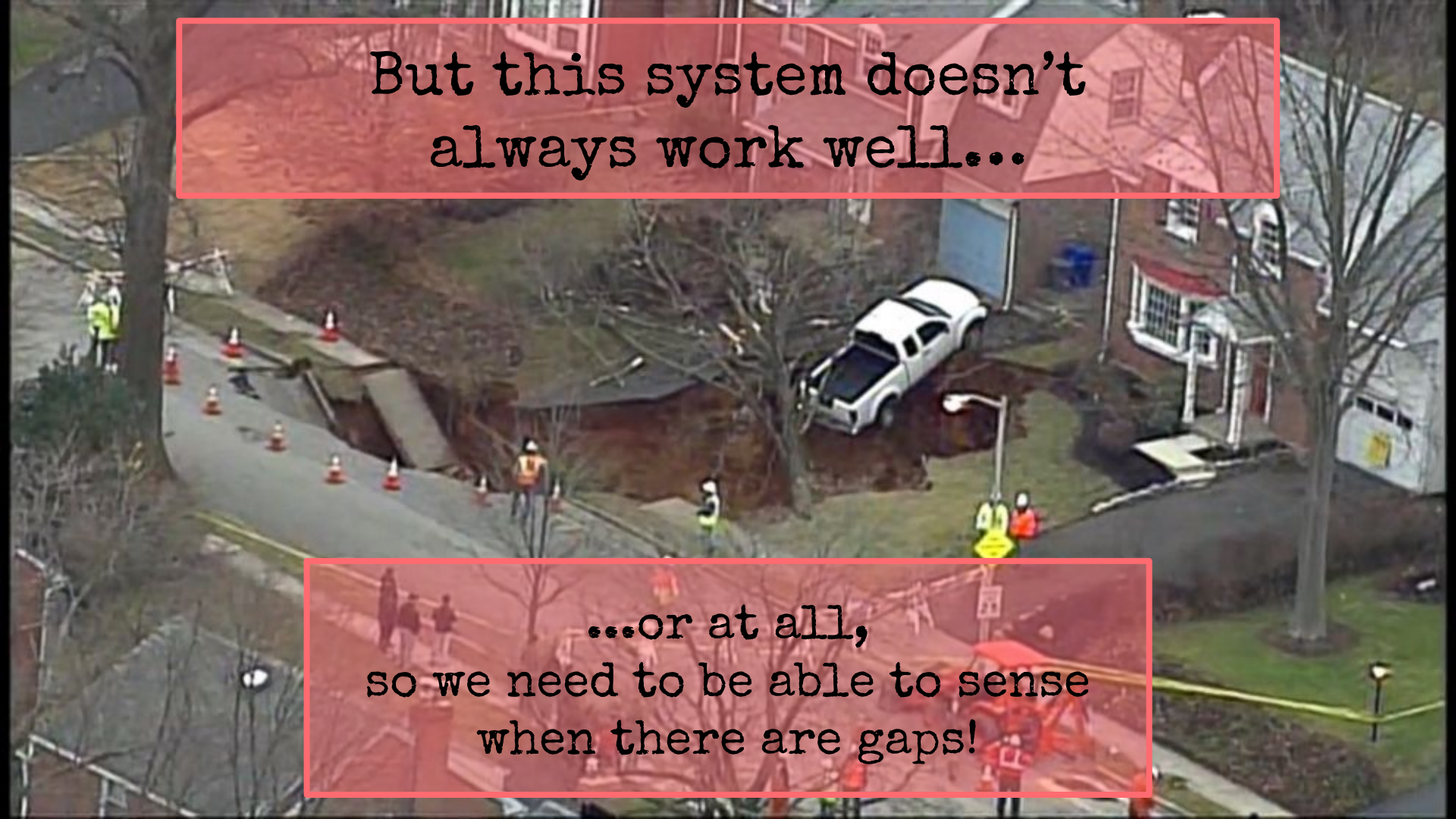
Org. Netmap

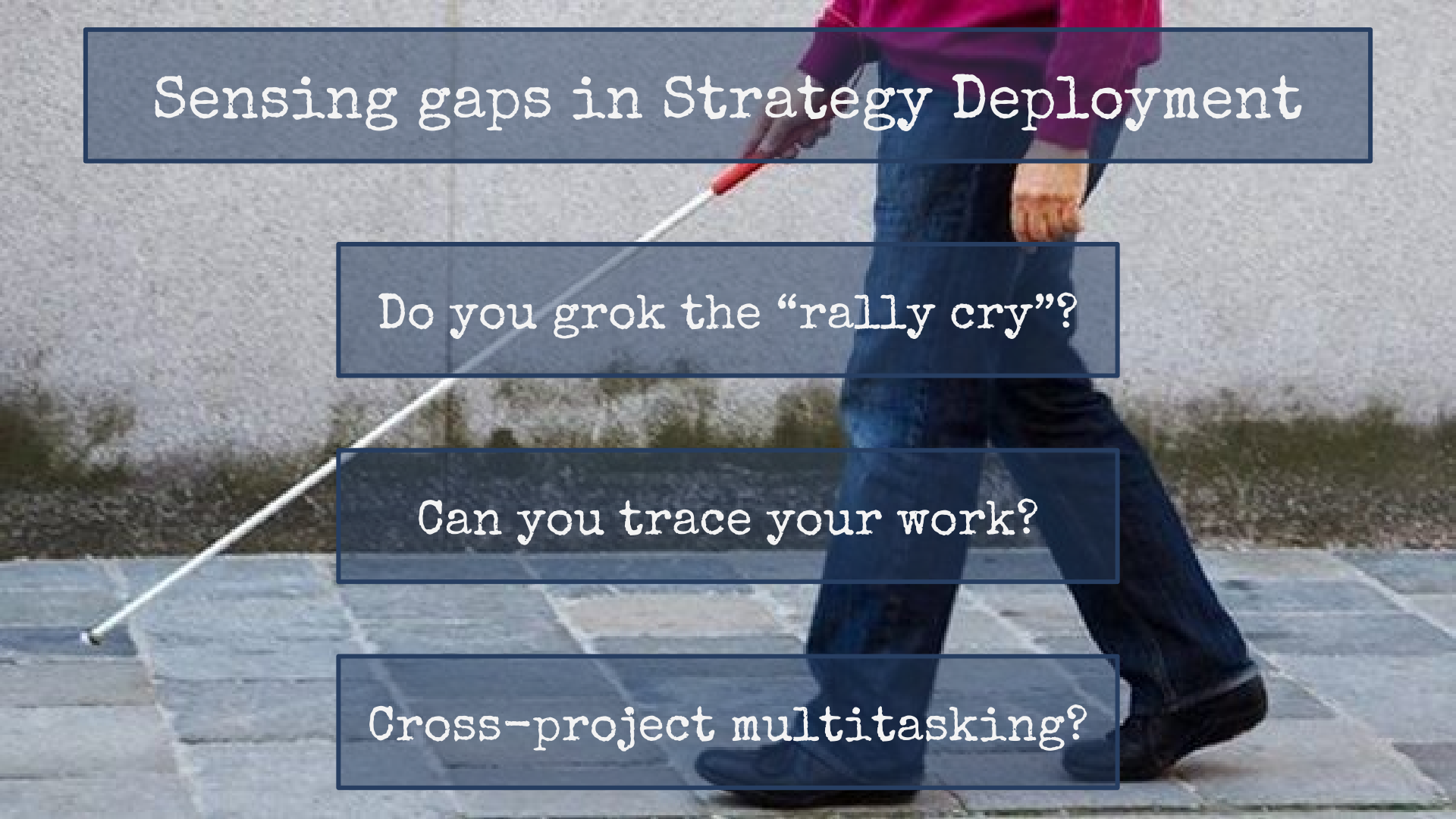

How they interconnect
Strategy Deployment
Portfolio Planning
Defines the long-term portfolio of business
Balances & prioritizes goals between departments
Adds focus by allocating capacity


How they interconnect
Portfolio Planning
Organization Structure
Optimizes flow within departments
Clarifies functions of groups and roles

How they interconnect




But this system doesn't always work well...
...or at all,
so we need to be able to sense when there are gaps!


Sensing gaps in Strategy Deployment
Do you grok the “rally cry”?
Can you trace your work?
Cross-project multitasking?

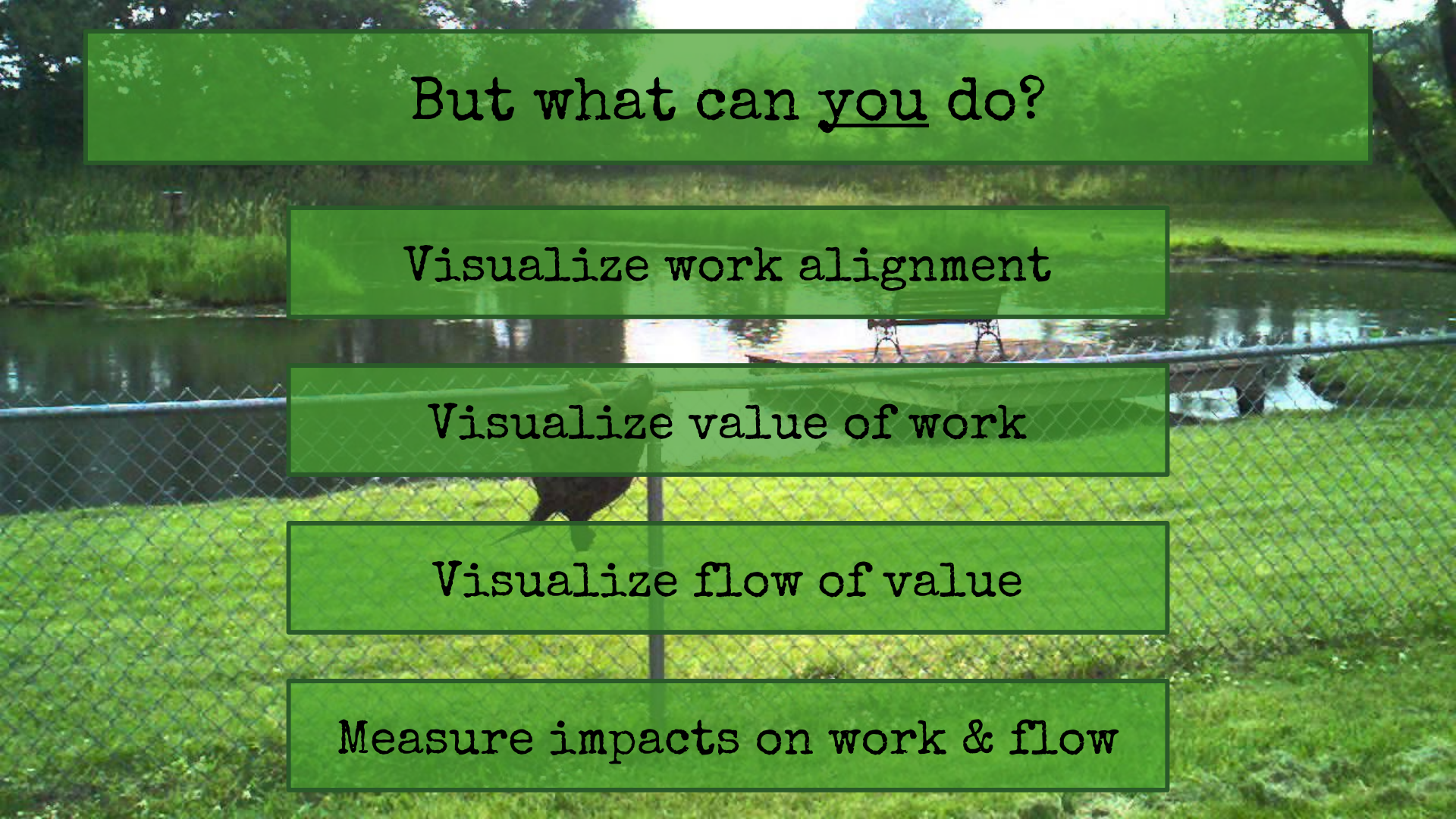
Sensing gaps in Portfolio Planning

Bottom-up estimated budgets?

Project-oriented funding?

Clear priorities for shared resources?

Sensing gaps in Organization Design
Too much higher-up approval?
Too many hand-offs?
Blame masked as accountability?


But what can you do?
Visualize work alignment
Visualize value of work
Visualize flow of value
Measure impacts on work & flow

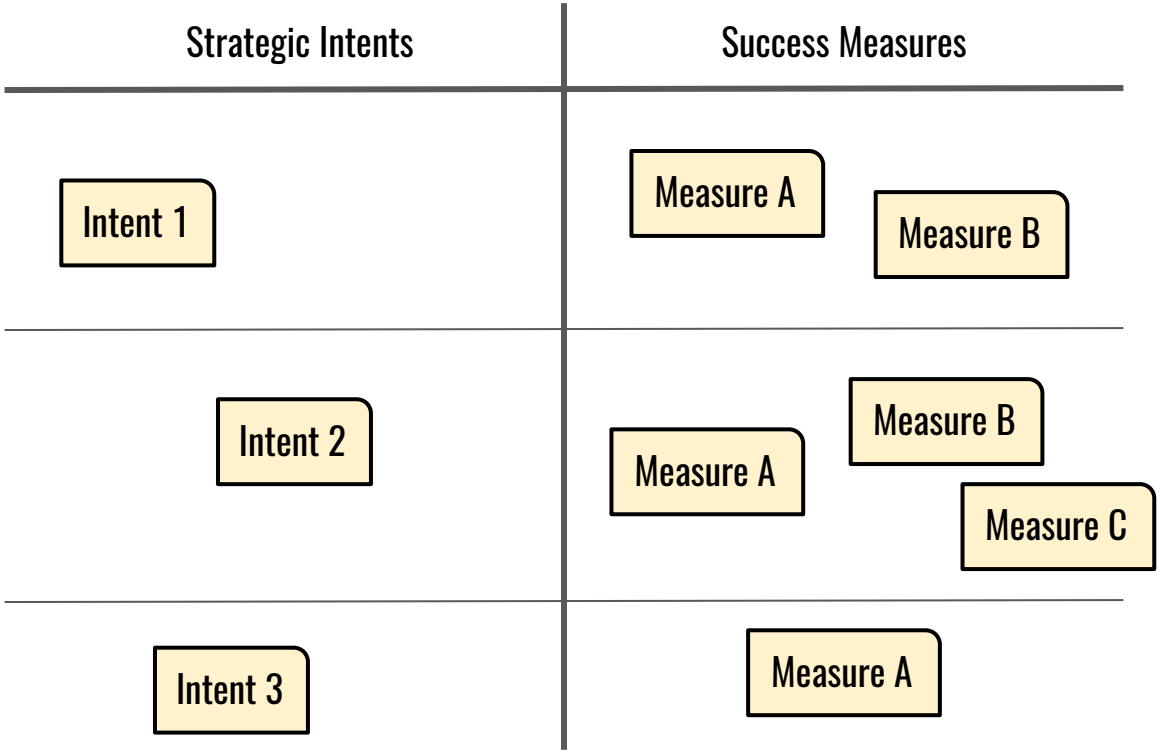
Visualize work alignment

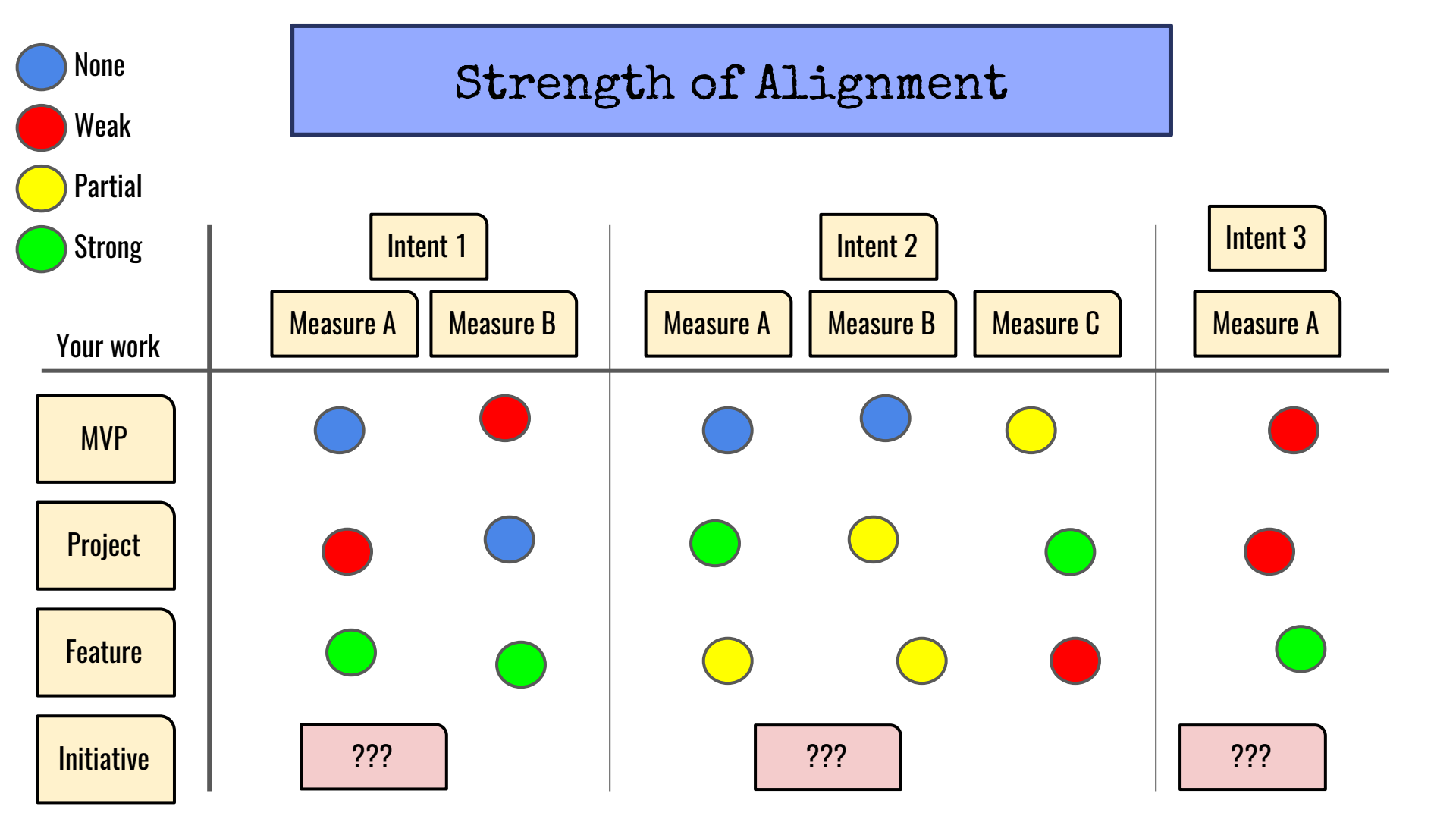
Strategic intents with measures

Strength of work alignment

Show you don't know!

Intents & Measures




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

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:

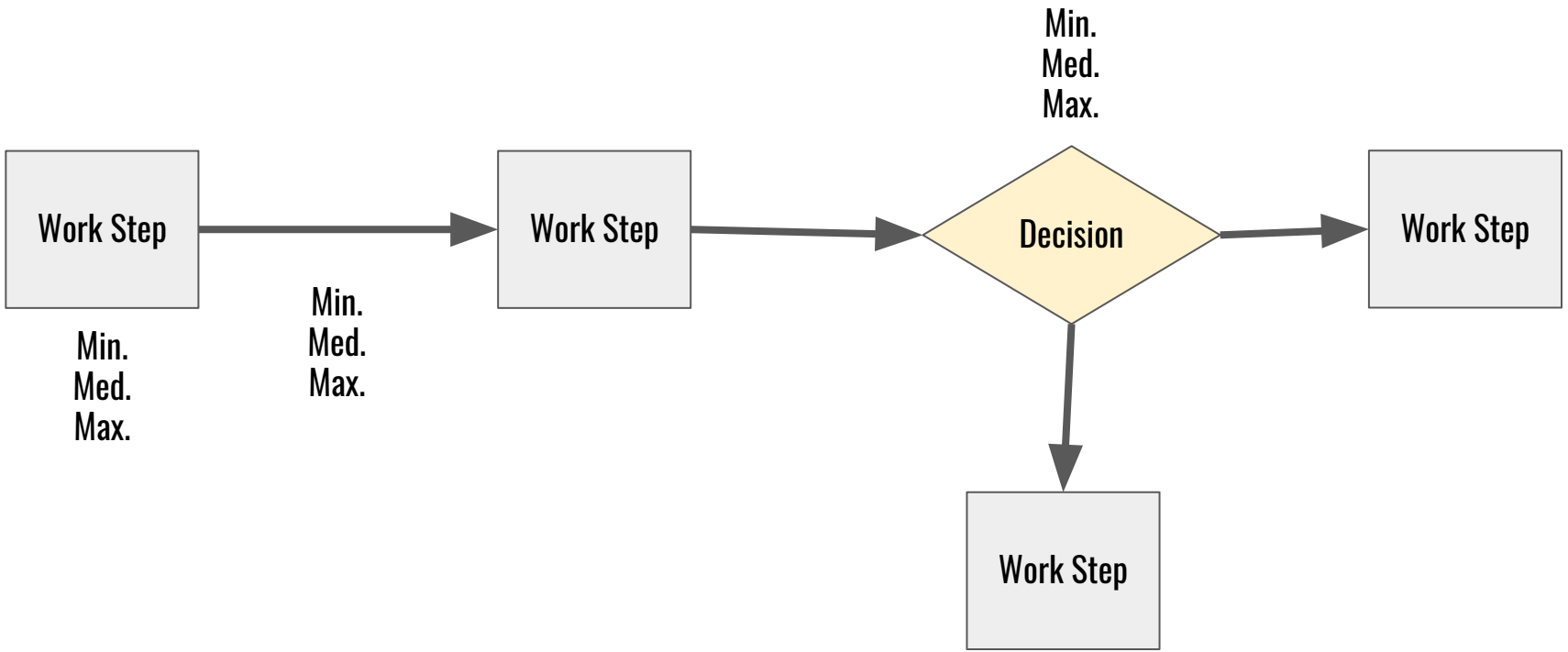
A brief pitch:

Cost of Delay & Priority

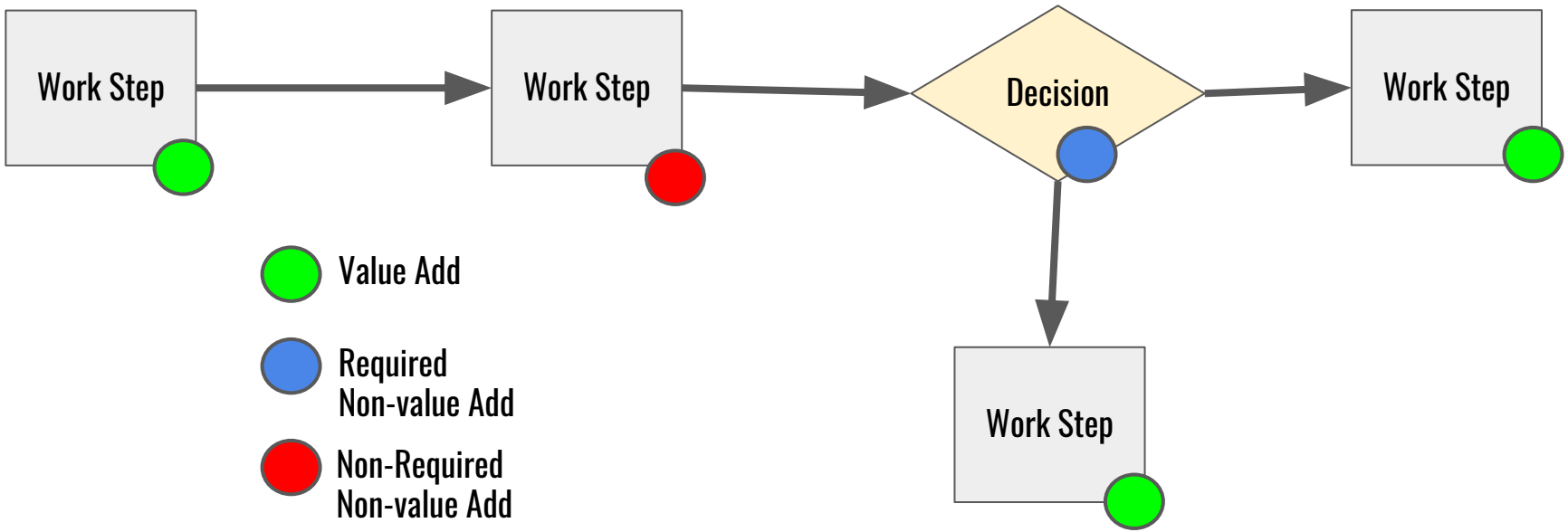
	Your work	Cost of Delay	Yelp Value
1)	MVP	X dollars / year	$$$$$
2)	Project	Y subscriptions / month	$$$$$
3)	Feature	Z referrals / quarter	$$$$$
4)	Initiative	???	$$$$$

Visualize flow of value
Show wait/queues & times
Show non-value add activities
Find “swirlies of doom”

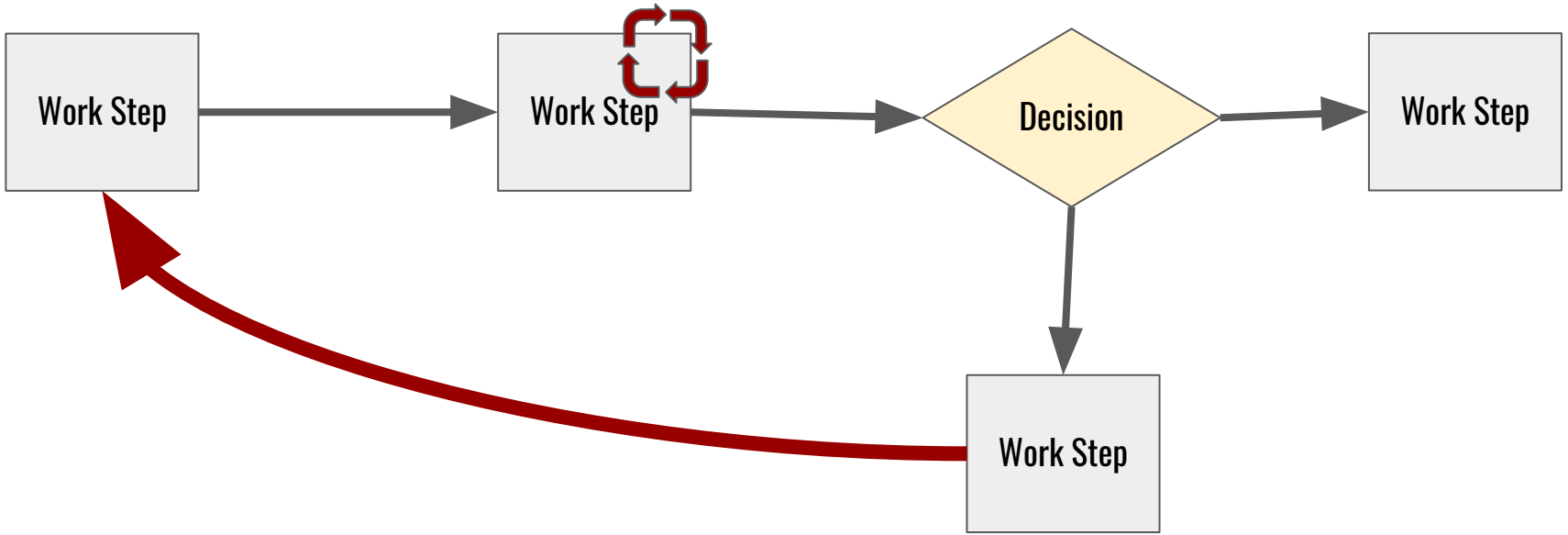
Show wait/queues & times

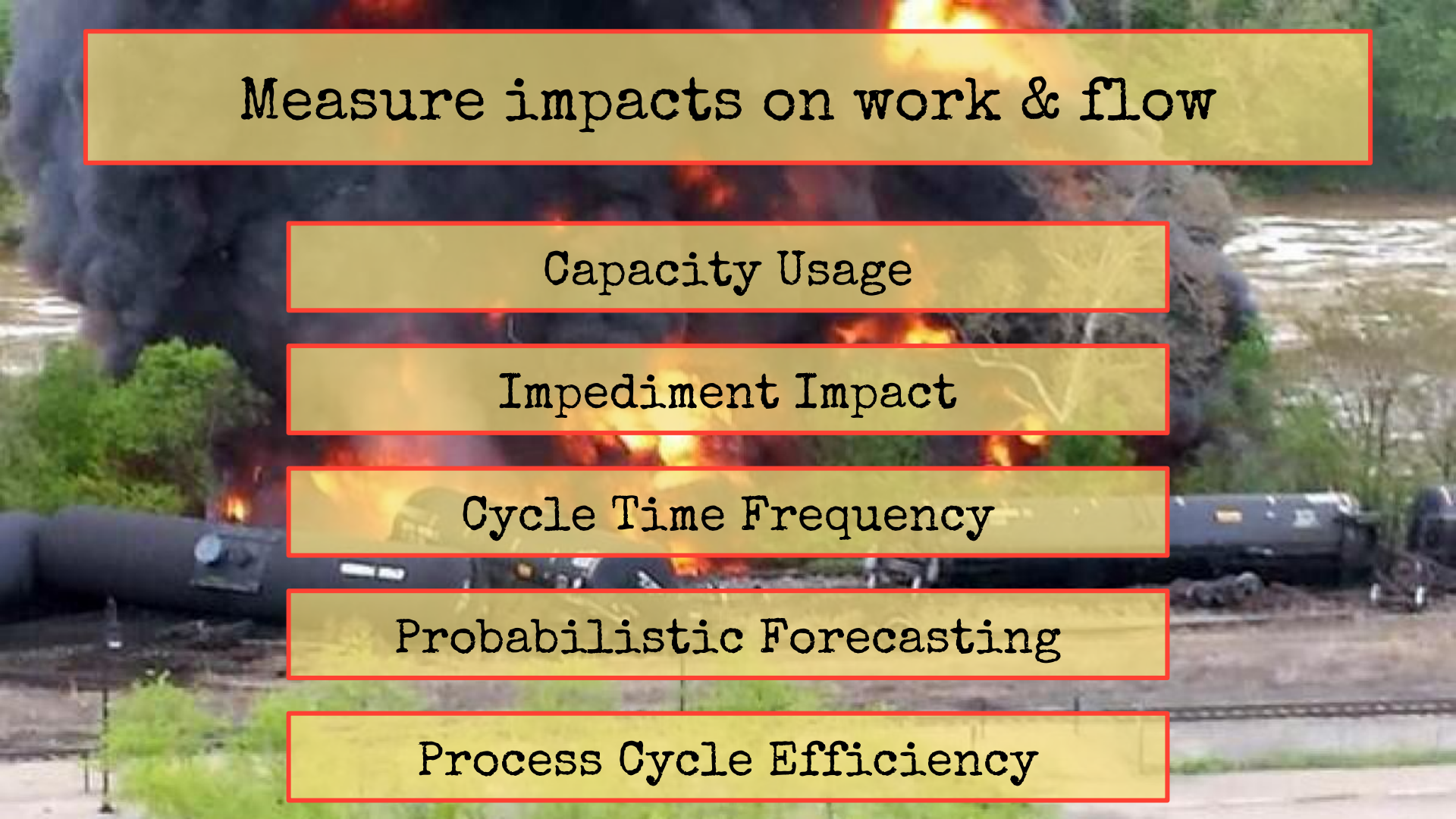


Show non-value add activities

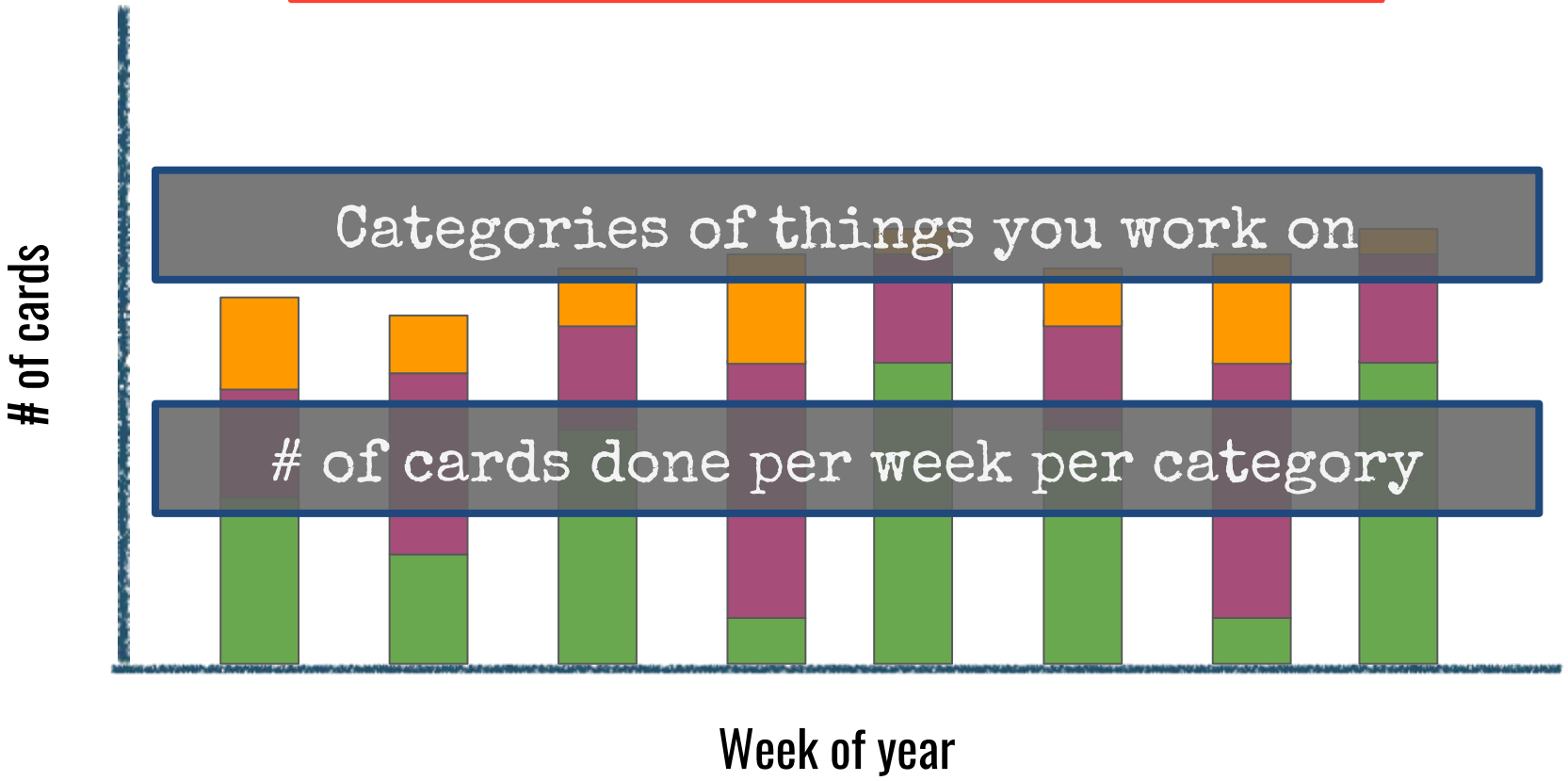


Find “swirlies of doom”

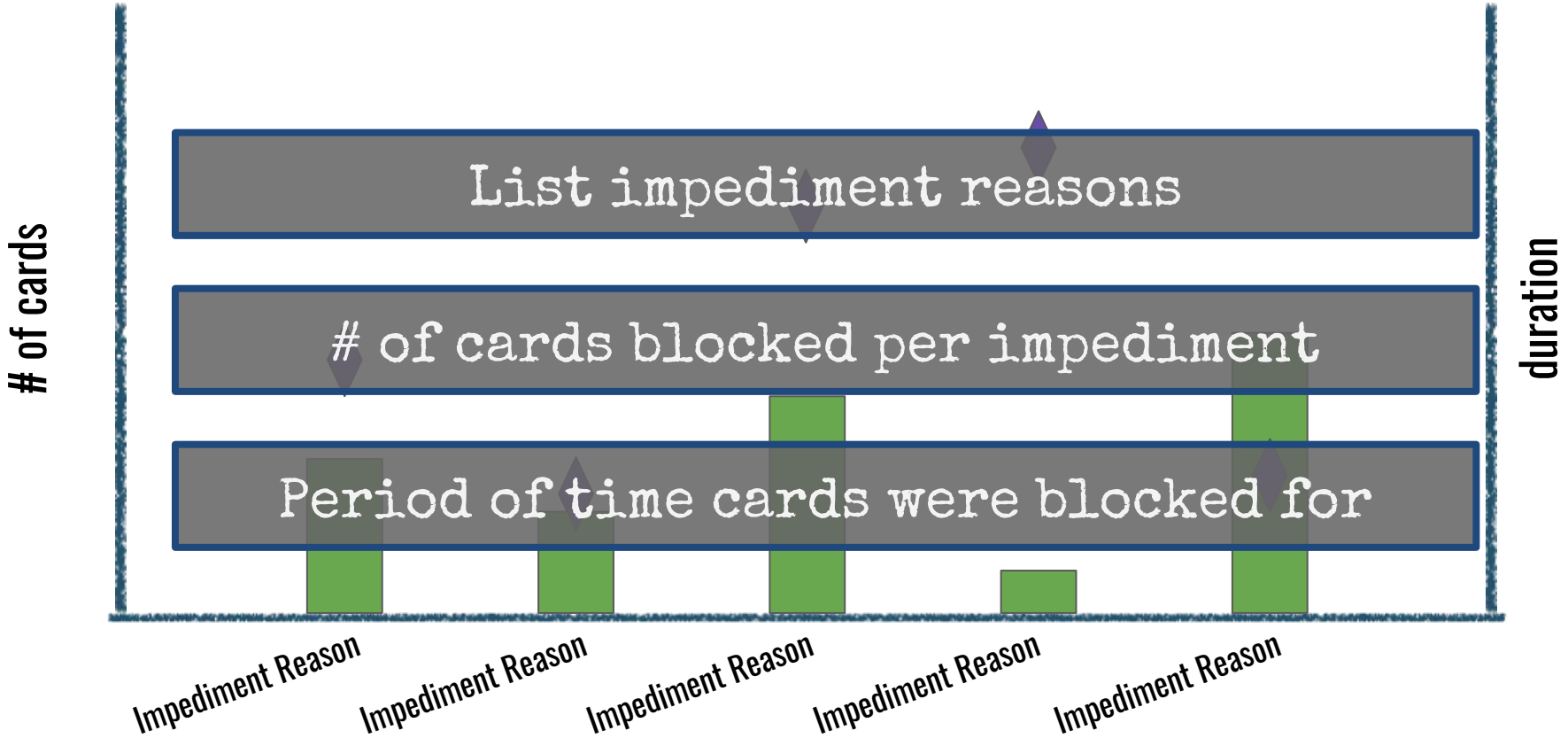


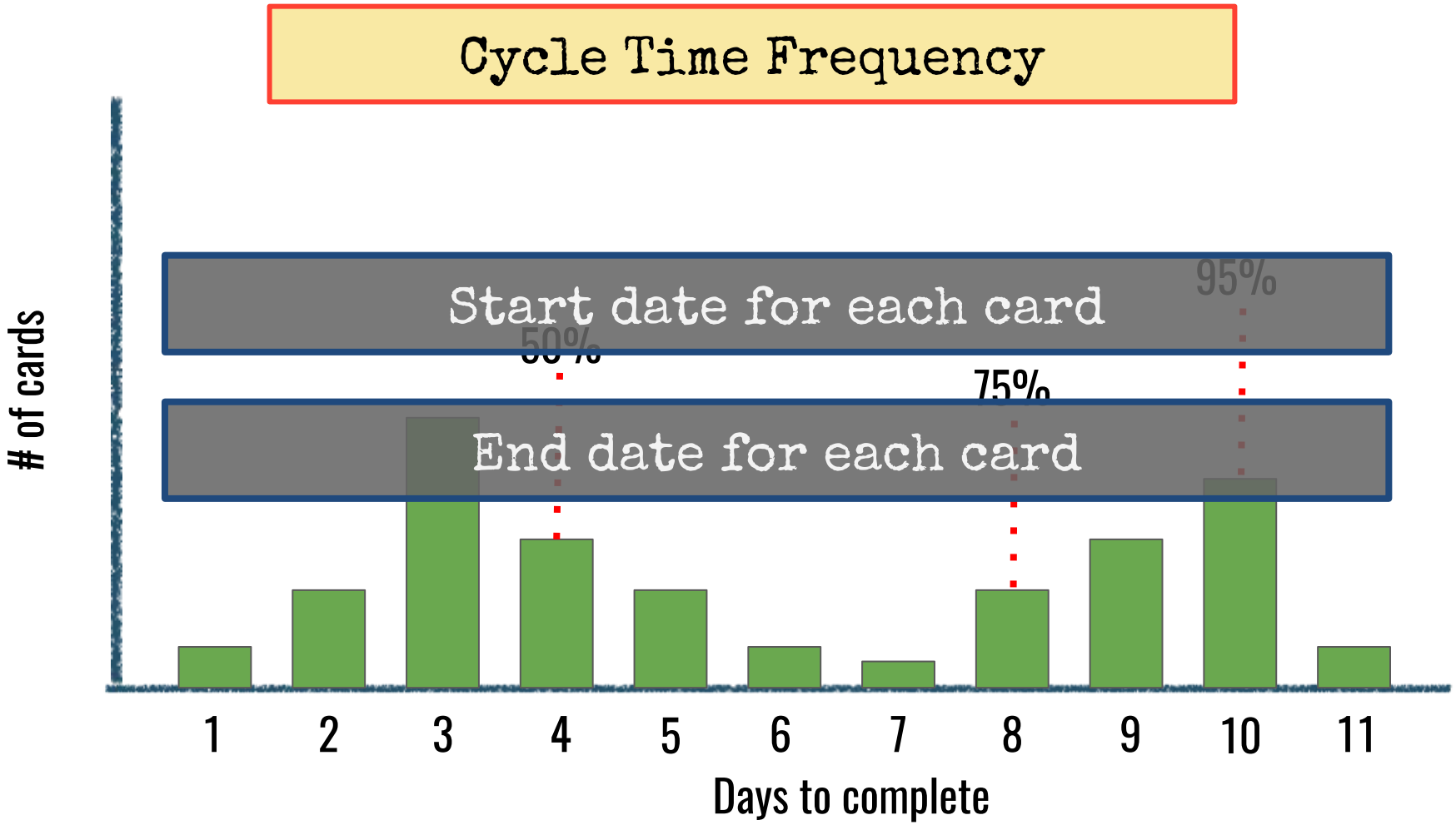

Measure impacts on work & flow
Capacity Usage
Impediment Impact
Cycle Time Frequency
Probabilistic Forecasting
Process Cycle Efficiency

Capacity Usage

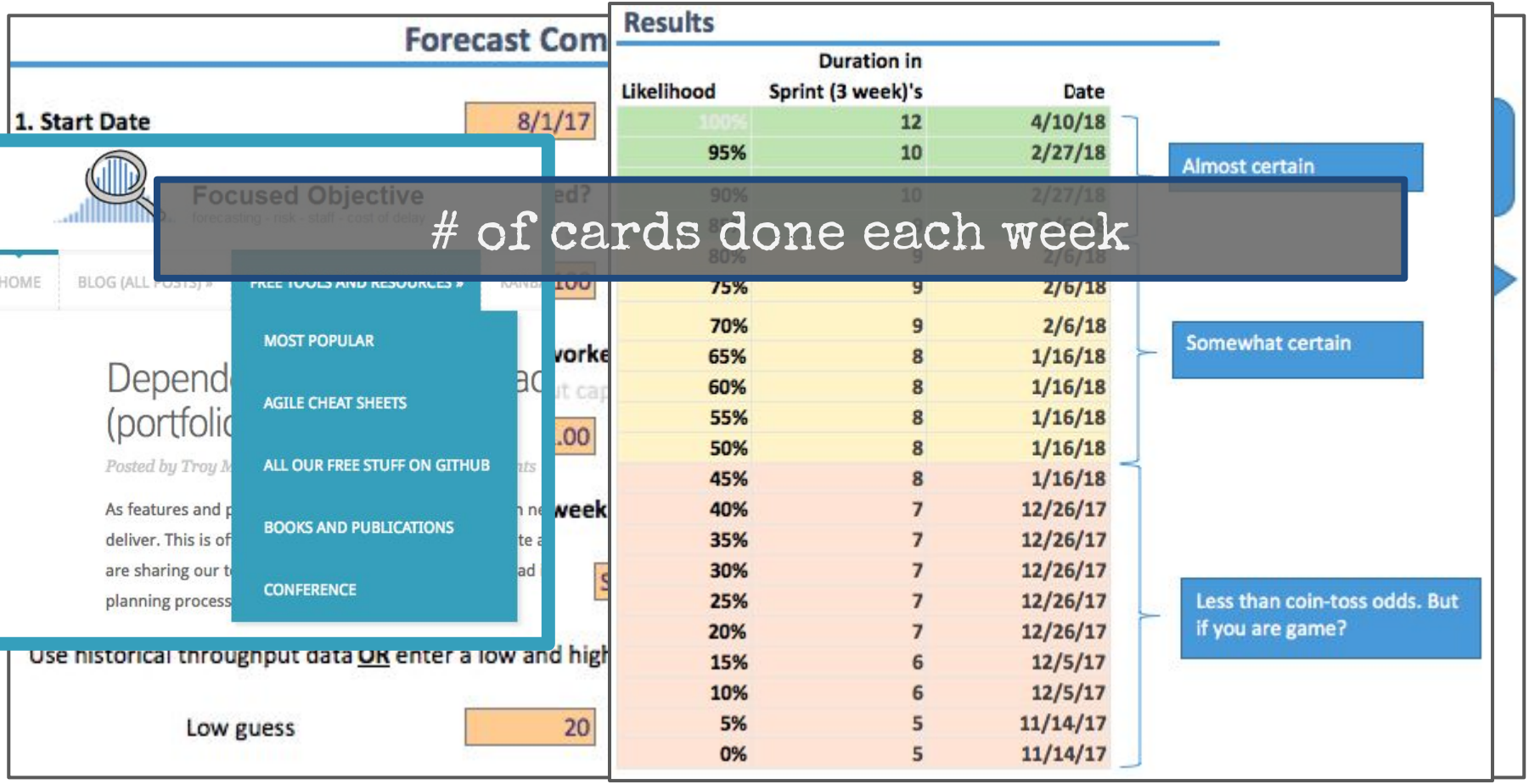


Impediment Impact



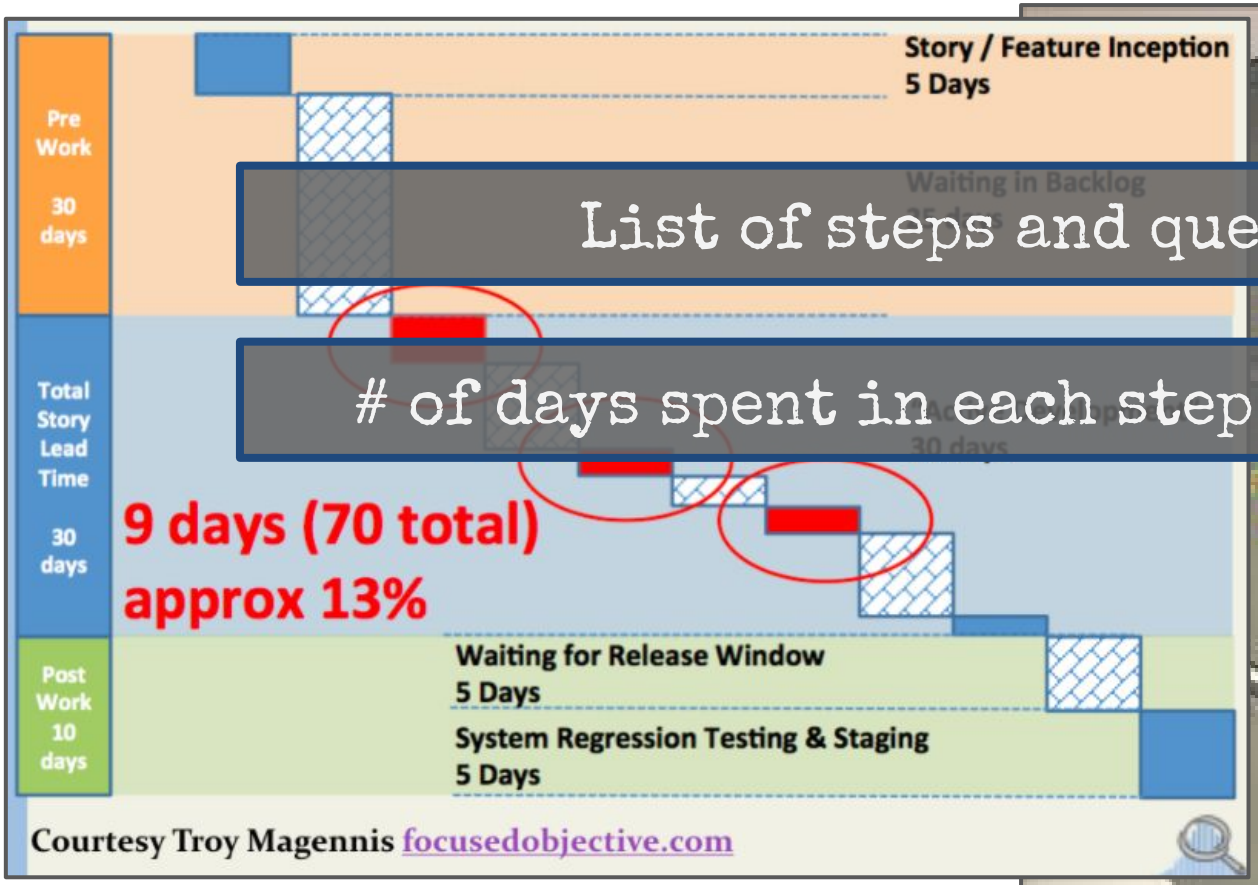

Cycle Time Frequency
Start date for each card
End date for each card
50%
75%
95%
# of cards
1
2
3
4
5
6
7
8
9
10
11
Days to complete

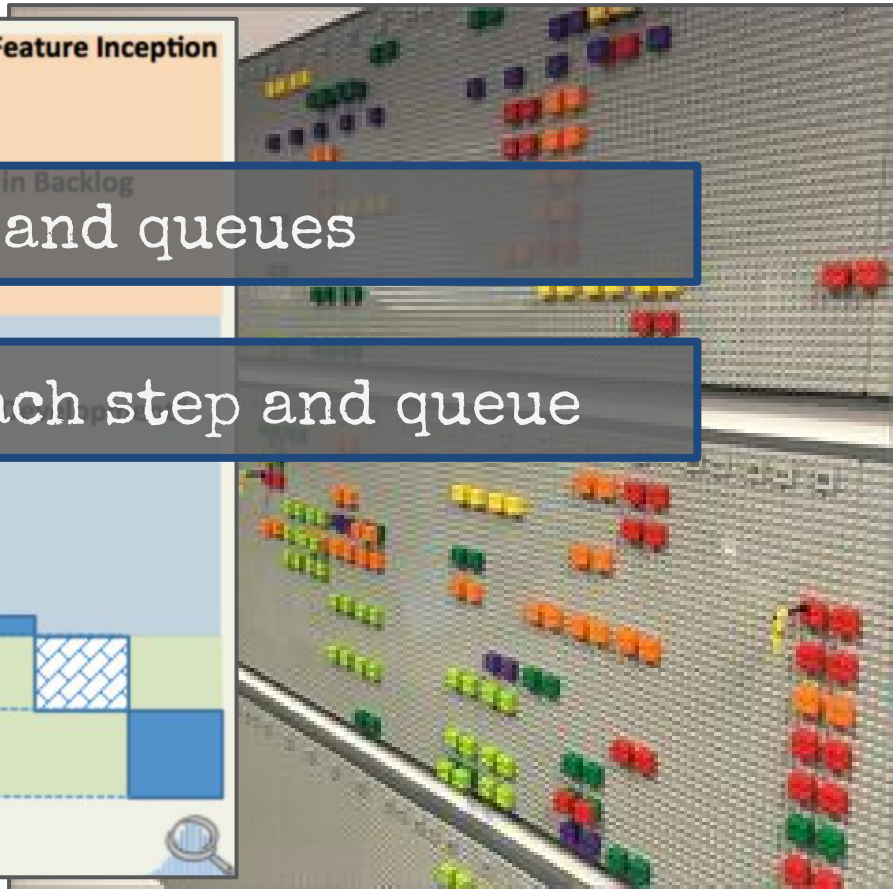
Probabilistic Forecasting



# of cards done each week

Process Cycle Efficiency





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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