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Strategy on a Page

Your Guides:
Erich Kissel and Matthew Palicki

Agenda

- “We’re STILL talking about this?!?”
- Strategic Framework Example
 - Aligning with Clarity PPM
- Exercise; Building our Strategic Plan and Dashboard

“We’re STILL talking about this?!?”

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This Is The Real Reason Your Strategic Plans Constantly Fail

Terina Allen Contributor
 I cover careers, strategic leadership and executive development.

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5 REASONS STRATEGY EXECUTION FAILS

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21 DEC 2023

Kate Gibson Contributors

CIO JOURNAL | Content by **Deloitte.**

The Wall Street Journal news department was not involved in producing this sponsor content.

LEADERSHIP

3 Reasons Good Strategies Fail

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Business strategies often hit the skids because of three avoidable strategic tensions. Understanding their root causes can help keep a plan on track.

Balanced Scorecard

The Office of Strategy Management

by Robert S. Kaplan and David P. Norton

From the Magazine **(October 2005)**

Most companies have ambitious plans for growth. Few ever realize them. In their book *Profit from the Core*, Chris Zook and James Allen report that between 1988 and 1998, seven out of eight companies in a global sample of 1,854 large corporations failed to achieve profitable growth. That is, these companies were unable to deliver 5.5% annual real growth in revenues and earnings while earning their cost of capital (a rather modest hurdle). Yet 90% of the companies in the study had developed detailed strategic plans with much higher targets.

Source: <https://hbr.org/2005/10/the-office-of-strategy-management>

Inc. NEWSLETTERS [SUBSCRIBE](#)

LEAD

Why 67 Percent of Strategic Plans Fail

Strategic planning is great, in theory, but more often than not it fails. Here's why.

EXPERT OPINION BY TANYA PRIVE, PARTNER, LEGACY TRANSFORMATIONAL CONSULTING @TANYAPRIVE1

OCT 23, 2020

Harvard Business Review

Strategy | 4 Common Reasons Strategies Fail

Strategy

4 Common Reasons Strategies Fail

by Andrea Belk Olson

June 24, 2022

“Yup.” ...and ~20 years later, MOST* strategies STILL “fail”!

“We’re STILL talking about this?!?”

Q: What factors have you seen be significant contributors to the success of a major program or strategic initiative?

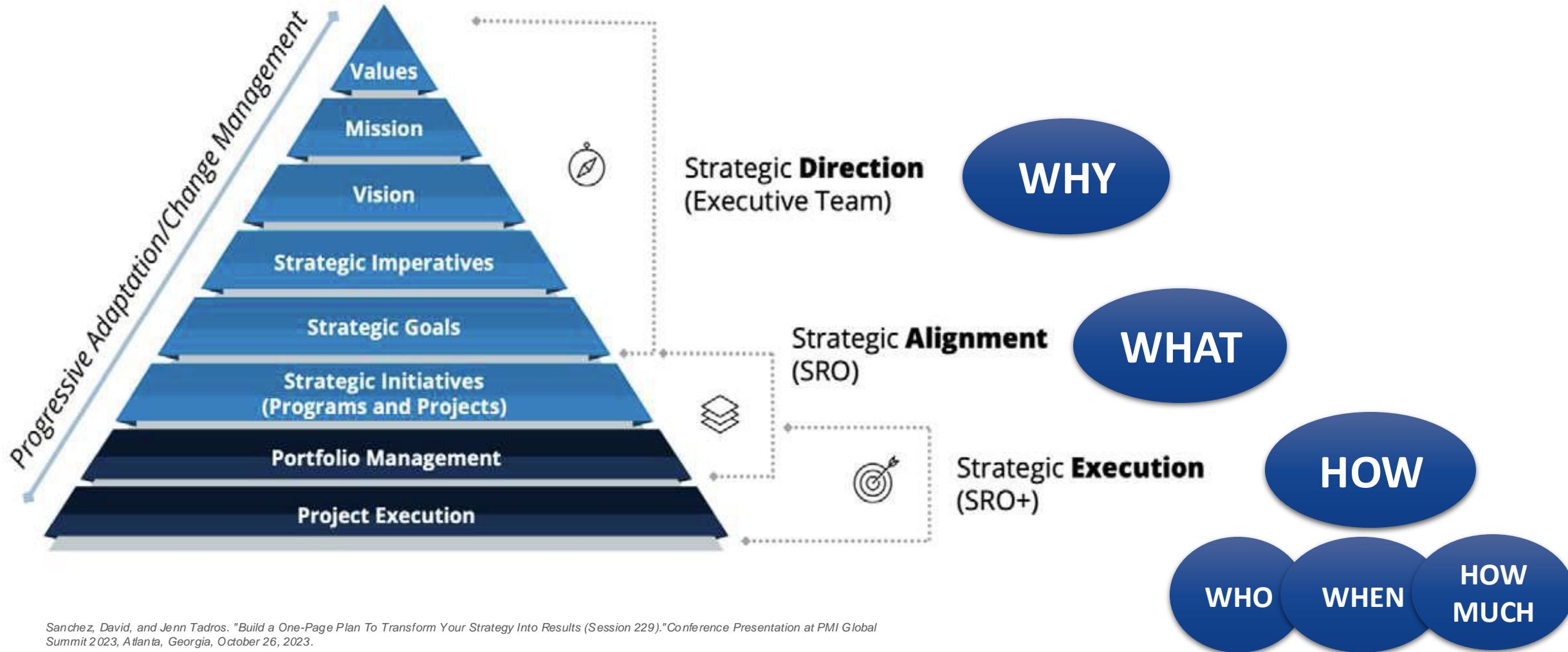
Insights from the cited study:

- Executive leadership engagement and support
- Visibility into the most important work
- Strong PPM structure, WITHOUT micromanaging
- Talent and skills management
- Communication and feedback mechanisms
- Aligning initiatives and strategy



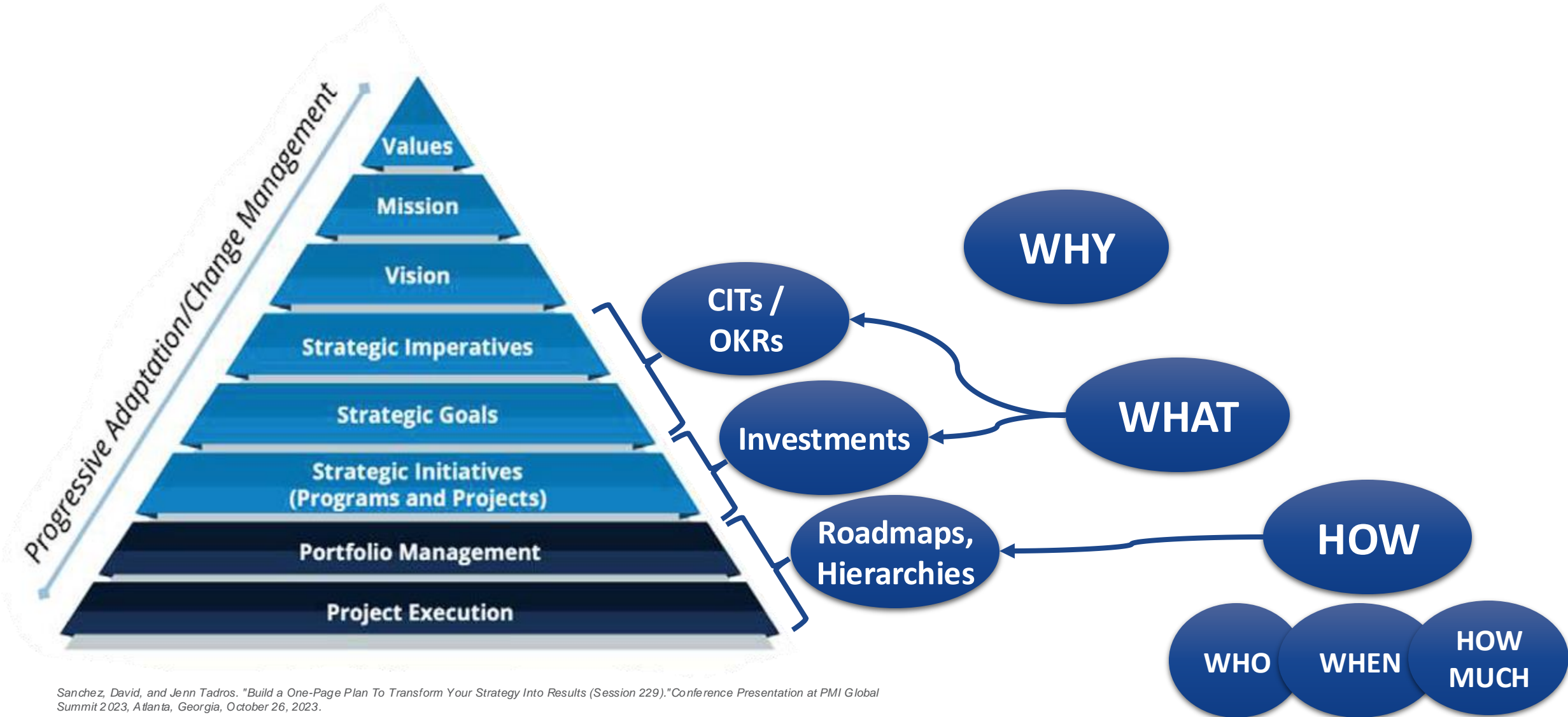
Source: <https://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/why-good-strategies-fail-report.pdf>

Strategy Framework Example



Sanchez, David, and Jenn Tadros. "Build a One-Page Plan To Transform Your Strategy Into Results (Session 229)." Conference Presentation at PMI Global Summit 2023, Atlanta, Georgia, October 26, 2023.

Strategy Framework – Aligned to Clarity PPM




Sanchez, David, and Jenn Tadros. "Build a One-Page Plan To Transform Your Strategy Into Results (Session 229)." Conference Presentation at PMI Global Summit 2023, Atlanta, Georgia, October 26, 2023.

Exercise: Building a Strategic Plan Hierarchy and Dashboard



Group Exercise – Welcome to Zenith Digital!



**ZENITH
DIGITAL**

Mission

As a global technology leader, we are committed to driving innovation, fostering connectivity, and empowering individuals and businesses to thrive in the digital age.

Vision

To be the world's most trusted and innovative technology partner, empowering individuals and businesses to thrive in the digital age through transformative solutions.


Key elements of the vision:

- Global leadership
- Trust and innovation
- Empowerment

Digital Banking Release Hierarchy
Global Compliance Program Hierarchy
Strategy - Test Me
Strategy on a page

Digital Banking Release Hierarchy

Actual Spend

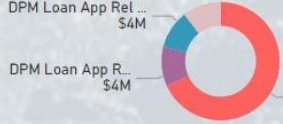


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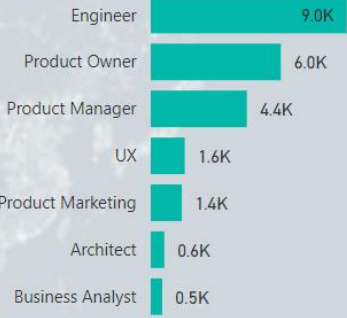
Portfolio ETCs

19.2K

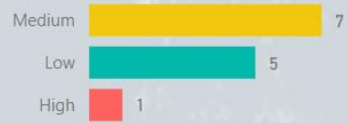
Spend by Strategy



Workforce Planning



Risk Insights



KPI Attainment

Strategic Initiative Summary

	Total Planned Cost	Total Budgeted Cost	Total Variance
☐ DPM Loan App Rel 4.0	\$4,280,800	\$347,000	(\$3,933,800)
☐ DPM Loan App Rel 5.0	\$4,166,800	\$357,000	(\$3,809,800)
☐ DPM Loan App Rel 6.0	\$4,174,800	\$365,000	(\$3,809,800)
Total	\$12,622,400	\$1,069,000	(\$11,553,400)

This is an example for a fictious company.

Team Exercise – 30 minutes

Each group will perform the following steps:

1. Create Strategic Initiatives (Programs) using data provided
 - a) Update Financials and Staff for each Program
 - b) Assign each Program to a Parent Strategic Goal as instructed
2. Open the assigned Hierarchy for your group
 - a) Import all the layers of your strategic framework
 - b) Review metrics and KPIs using widgets and canvas
3. Final consolidated results will be displayed by the facilitators in an integrated PowerBI dashboard

- Facilitators will distribute detailed instructions now

Find them online at <https://bit.ly/regouzen>

or scan the RED QR code



- [Clarity Server Address:](https://bit.ly/RegoU_Art2024)
https://bit.ly/RegoU_Art2024
(CASE SENSITIVE) or scan the BLUE QR code



Group Exercise – 30 minutes

Group	Username	Password	Strategic Initiatives (Programs)	Hierarchy
A	zen01	Zenith01!	<ul style="list-style-type: none">Invest in emerging technologiesFoster innovation culture	Zenith01
B	zen02	Zenith02!	<ul style="list-style-type: none">Enhance customer experienceGather customer feedback	Zenith02
C	zen03	Zenith03!	<ul style="list-style-type: none">Target new marketsForm strategic partnerships	Zenith03
D	zen04	Zenith04!	<ul style="list-style-type: none">Reduce environmental impactPromote ethical sourcing	Zenith04
E	zen05	Zenith05!	<ul style="list-style-type: none">Attract top talentProvide ongoing training	Zenith05



- https://bit.ly/RegoU_Art2024 (CASE SENSITIVE)
- **NOTE**: After logging in, you may have to select “Plan & Manage Work” from the Home menu

Group Results and Debrief

- In one word, what was this experience like for you?
- What was the most challenging thing about this exercise?
- What was an “a-ha moment” or ingenious idea in your group?
- How realistic was this compared to your personal experiences?
- What would you do differently in the real world?

Call to Action

- What is one takeaway from this session you can attempt to bring into your next strategic planning efforts?

Additional Resources

Additional RegoU Sessions:

[Adaptive Leadership for Diverse Teams \(Wednesday, 1540\)](#)

[Roadmaps Roundtable \(Thursday, 1010\)](#)

Articles/Webinars/Tools:

<https://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/why-good-strategies-fail-report.pdf>

<https://info.regoconsulting.com/top-ppm-and-work-management-trends-for-2024-december-2023>

<https://info.regoconsulting.com/concepts-of-creativity-june-2020>

<https://www.prosci.com/blog/sustainment-in-change-management>

<https://businessleadershiptoday.com/how-does-leadership-affect-organizational-success/>

<https://www.hunimed.eu/news/the-flow-state-the-brains-most-productive-state/>

<https://www.forbes.com/sites/hillennevins/2023/01/05/how-to-get-stuff-done-the-eisenhower-matrix-aka-the-urgent-vs-the-important/>

<https://pomofocus.io/>

Books

[Accelerate: Building Strategic Agility for a Faster-Moving World, John P. Kotter](#)

[Out of the Crisis, W. Edwards Deming](#)

[The 4 Disciplines of Execution, McChesney/Covey/Huling](#)

[Deep Work: Rules for Focused Success in a Distracted World, Cal Newport](#)

[Slow Productivity: The Lost Art of Accomplishment Without Burnout, Cal Newport](#)

Measure what matters

Personal Growth

[From Strength to Strength, Arthur C. Brooks](#)

[Designing Your Life, Bill Burnett and Dave Evans](#)

[The Six Types of Working Genius, Patrick Lencioni](#)

[Seven Spiritual Laws of Success, Deepak Chopra](#)

[The Four Agreements; A Practical Guide to Personal Freedom](#)

Questions?





Master Clarity with Rego University

Earn Certifications in Administration, Leadership, and Technical Proficiency

Let Rego be your guide.



Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



Certification Requirements:

- ✓ **Completion:** 12 units per certification track
- ✓ **Eligibility:** Open to all Rego University attendees



Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

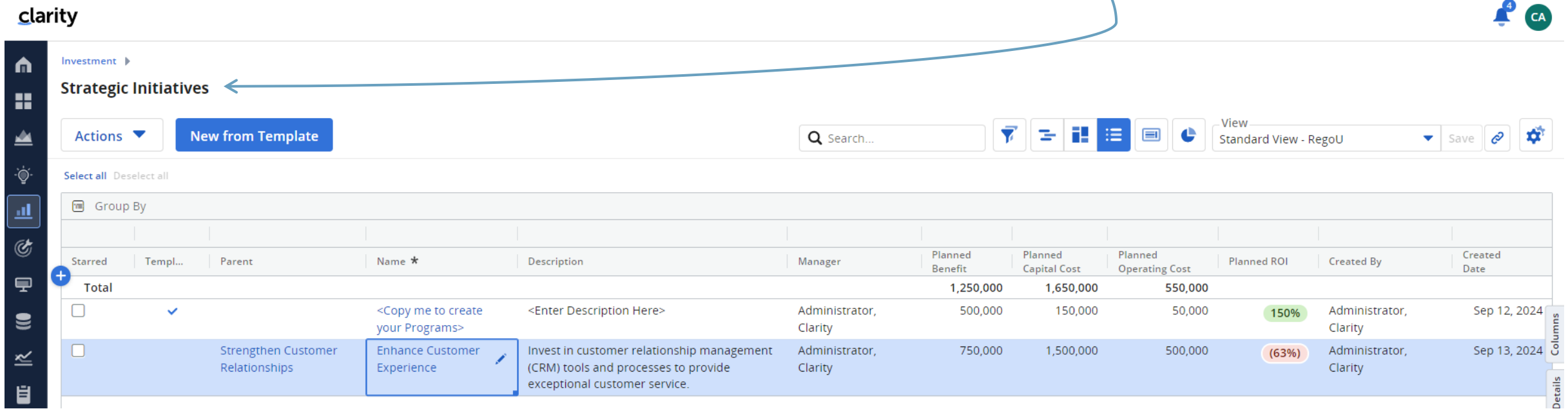
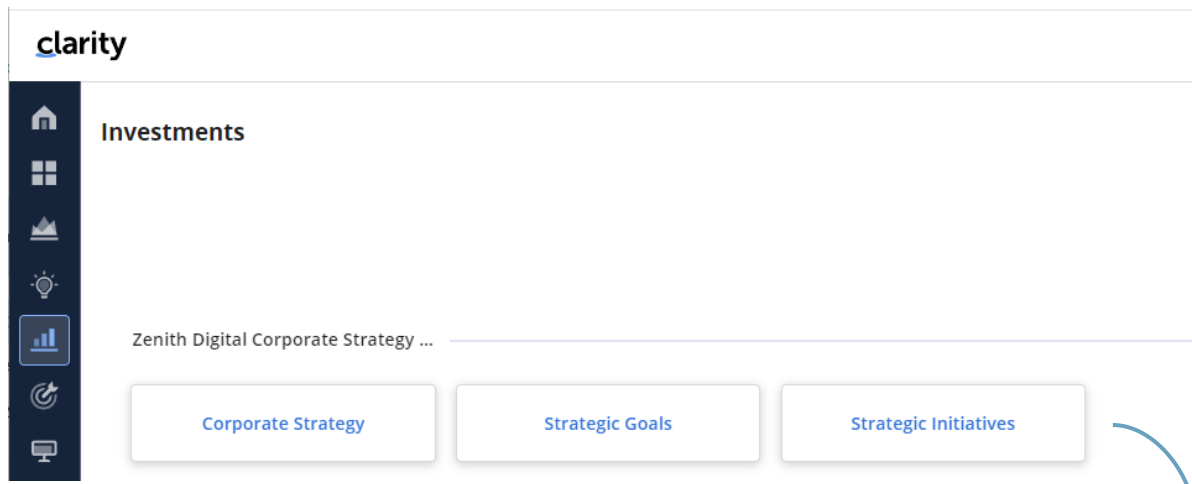
info@regoconsulting.com



Website

www.regouniversity.com

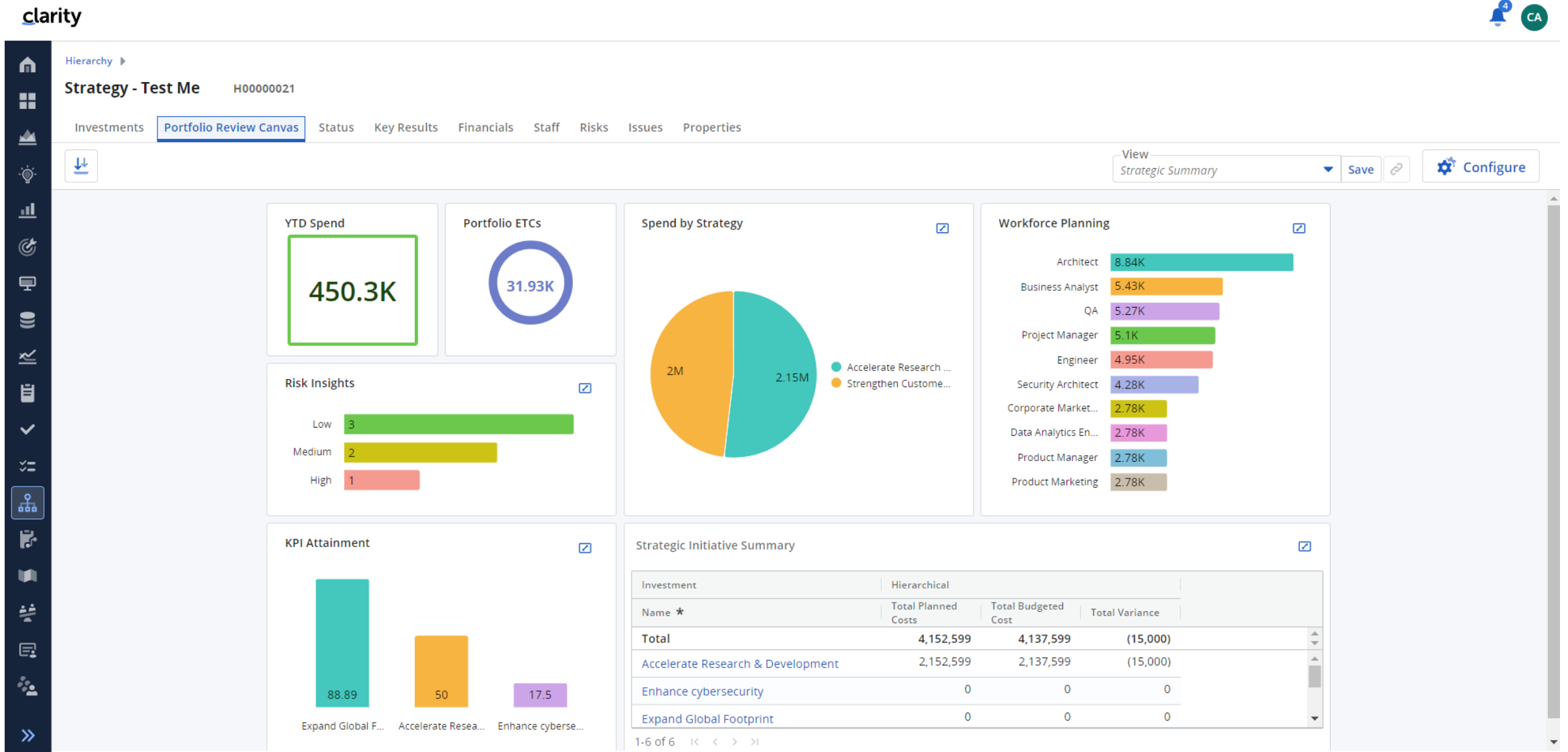
Group Exercise Screenshots



Group Exercise Screenshots

The screenshot displays the Clarity software interface for a strategy project titled "Strategy - Test Me" (ID: H00000021). The main view is a hierarchy diagram under the "Investments" tab. The root node is "Zenith Digital 2030 Corporate Strategy" (Investment ID: 00000001, Finish: Sep 12, 2024). It branches into several child nodes: "Accelerate Research & Development" (Investment ID: 00000002, Finish: Sep 12, 2024), "Strengthen Customer Relationships" (Investment ID: 00000003, Finish: Sep 12, 2024), "Expand Global Footprint" (Investment ID: 00000004, Finish: Sep 12, 2024), "Sustainable business models" (Investment ID: 00000005, Finish: Sep 12, 2024), "Invest in talent development" (Investment ID: 00000006, Finish: Sep 12, 2024), and "Enhance cybersecurity" (Investment ID: 00000007, Finish: Sep 12, 2024). The "Accelerate Research & Development" node further branches into "eCommerce Portal" (Investment ID: PR2007, Finish: Jun 13, 2023), "ABLE Payments Module" (Investment ID: PR2009, Finish: Apr 13, 2023), and "Enhance Customer Experience" (Investment ID: 00000009, Finish: Jan 13, 2026). A context menu is open over the root node, showing options: "Import Children", "Auto-Import Children", "Hide Children", and "Delete". The interface includes a top navigation bar with tabs for "Investments", "Portfolio Review Canvas", "Status", "Key Results", "Financials", "Staff", "Risks", "Issues", and "Properties". A left sidebar contains various tool icons, and a right sidebar has "View" (Enterprise Strategy Default), "Save", and "Filter Widgets" options.

Group Exercise Screenshots



Group Exercise Screenshots

clarity 4 CA

Hierarchy ▾

Strategy - Test Me H00000021

Investments Portfolio Review Canvas **KPI Tracking** Status Financials Staff Risks Issues Properties

Search... View (Copy) Standard View Save

Select all Deselect all

Group By

Investment	KPI Tracking							
Name * ↑	Name *	Metric Description	% Attained (Average)	Current Metric (Average)	Target Metric (Average)	Last Updated Date	Status	Target Date
Total			46	26	51			
<input type="checkbox"/> Accelerate Research & Development	Increased Research Output	Achieve a [X%] increase in the number of research papers published in top-tier journals within [Y] years.	20	5	25	Sep 12, 2024	In Progress	
<input type="checkbox"/> Accelerate Research & Development	Faster Product Time-to-Market	Reduce the average time to market for new products by [X%] compared to the previous year.	50	5	10	Sep 12, 2024	In Progress	
<input type="checkbox"/> Accelerate Research & Development	Enhanced Innovation Efficiency	Increase the percentage of research projects that result in successful product development by [X%].	80	40	50	Sep 12, 2024	Partially Achieved	
<input type="checkbox"/> Enhance cybersecurity	1		10	5	50	Sep 13, 2024		
<input type="checkbox"/> Enhance cybersecurity	2		25	20	80	Sep 13, 2024		
<input type="checkbox"/> Expand Global Footprint	1		89	80	90	Sep 13, 2024		

Columns

Details