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Policy Article

Strategy Development and Implementation in a Complex Multinational IT Organisation

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ABSTRACT:

A strategy helps position an organisation in an environment. Often plans are wrongly presumed to be strategies and complex strategies can include a reorganisation. Strategy Development in a multinational organisation that is operating in an international environment is not easy. The intrinsic complexity of developing a strategy in this environment causes unusual frictions due to highly volatile factors such as the speed of change, slow political processes and often cumbersome acquisition processes. Doing so for the first time, as a concurrent merger of five other organisations takes place, is not simple. However, when necessity requires it, one can undertake a full strategy development. Building a strong senior management team is a pre-requisite. The team can be enhanced through the strategy development process, strategy production and subsequent implementation, by locking in the senior management team to a common endeavour. If they can be brought together and work together collegiately, collectively they can deliver the strategic outcome required.

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Introduction

This paper describes what a strategy is and how it differentiates from a plan, its contents, how strategy can be developed and implemented in a complex IT organisation. It is based upon the experience of doing so in a complex multinational and international IT organisation within the security domain.

The organisation had been recently formed from the merger of five other organisations. The organisation's senior management team were therefore developing a strategy and everything required to set the 'first' strategic direction for a new organisation, almost from scratch. Concurrently, they were learning to work together and establishing some basic principles to do so constructively.

The expectations of the organisation's political Agency Supervisory Board of nations (the Board), in a very short period of time, were extremely high. Especially in terms of the performance of the senior management team and the output of the organisation the team was building. The pressures this placed on the senior management team to ensure the organisation headed off in the right strategic direction to meet the Board's expectations, led to some fairly detailed and complex up-front analysis. The management team developed a strategic implementation method to ensure they worked together and collectively drove towards objectives and targets that were assigned to individuals within that team, but delivered a collectively strategic outcome.[1] Mistakes were made and some lessons learned.

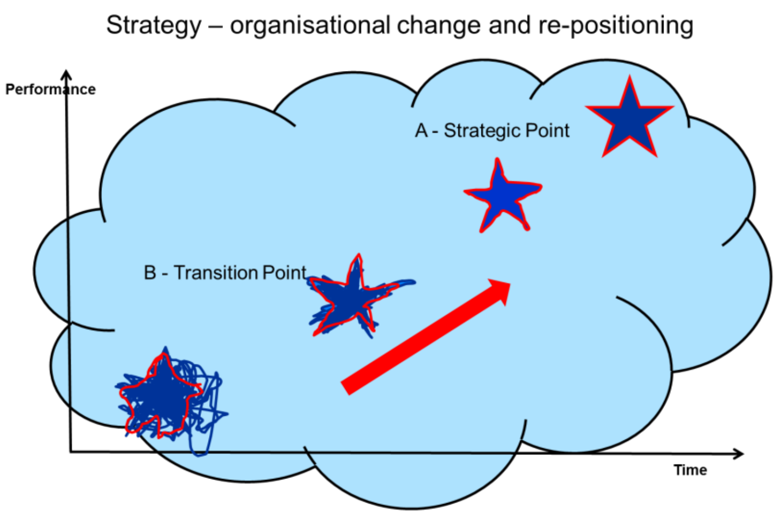

Figure 1: Strategy – organisational change and re-positioning.[2]

Strategy – Organisational Change and Repositioning

The term 'Strategy' stems from military thinking and in ancient Greek, Indian or Chinese writings, aims to marshal resources within imprecise time and space factors to deliver a large scale (strategic) effect. Nowadays, the term is used erroneously when the word *plan* should be used. Unlike a plan (which should be finely devised and carefully executed within defined temporal parameters, according to well-known management techniques and rules), a strategy is perhaps better thought of as a desired intent for the organisation. It is devised when not all the details could be known. By its implementation in the intended timeframe and environment, the strategy could initiate unintentional or unforeseen change, potentially rendering the need for a completely new strategy (and not just a revision of the existing strategy), at some unexpected or intended point. A change in strategy is always inevitable. This is because organisations operate in environments which, like a cloud, are changing and re-forming. The primary difference from environment to environment is the pace of change. All are naturally unstable and changing within their timeframes.

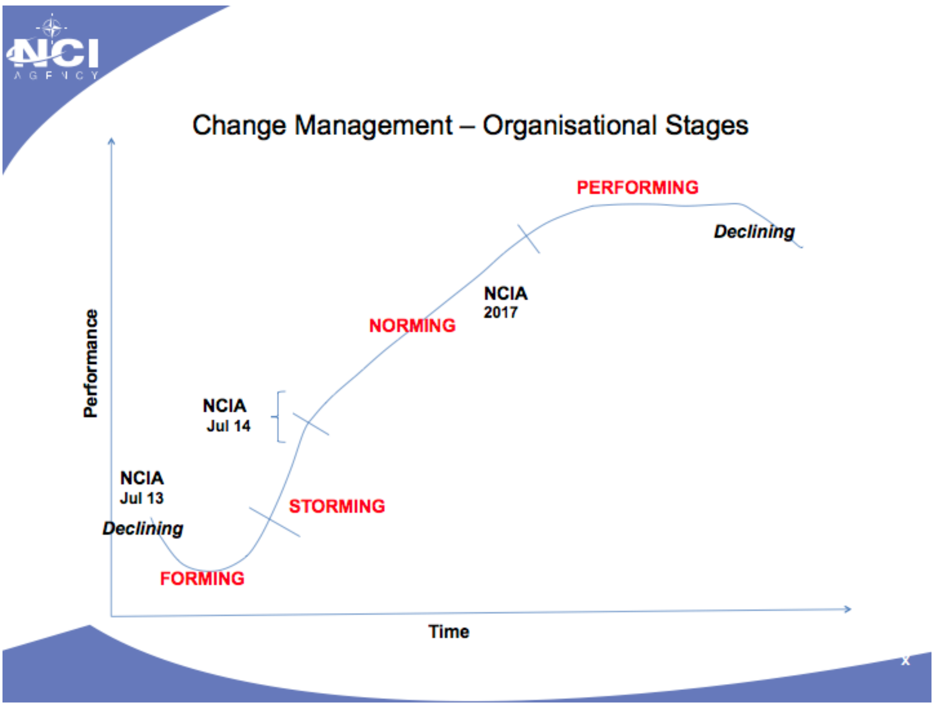

Figure 2: Change Management – Organisational Stages.

A complex organisational strategy occurs when the requirement is to undertake a shift in the position of the organisation relative to the environment, while concurrently changing the entire organisation. The strategist needs to anticipate this requirement, watching the environment, learning how it changes and how quickly. He should have the instinct and information to propose to the organisation's leadership that a strategic repositioning—and, if needed, a reorganisation for that new position—must be undertaken.

If the organisation neither repositions nor reorganises, gradually it becomes 'messy' – it is no longer neatly designed for the thing it is supposed to do. This is not a situation where poor management is being conducted inside the organisation, though it may be; the fact is that the organisation has undergone small structural changes over time and concurrently drifted into another environment (or the environment has changed around the organisation). The organisation is therefore now in need of repositioning and probably some change management in the process of repositioning.

The combined act of repositioning and reorganising should lead to an improvement in performance and at some moment in that process it will reach a Transition Point where the middle management of the organisation take over the role of driving performance improvement from the senior management, and by their local actions, performance improves little by little. For me, this is when the organisation has completed *Storming* and is about to begin *Norming*.[3]

When do you just need a Plan rather than a Strategy?

Using a ship at sea analogy, a strategy is required if the ship's crew are not just sailing the ship badly, but the ship is running in the wrong direction and nobody on bridge of the ship, or at the Admiralty, knows where it is going and why. It just keeps going though. If the crew are not sailing the ship properly but the ship is heading in the right direction and in the Admiralty's view still fulfilling the purpose of the organisation albeit poorly, you do not need a Strategy, just a Plan to fix the way the crew sail the ship.

You need a strategy when the organisational ship is not just being sailed badly and in the wrong direction to a destination nobody can describe, but the ship is no longer fit for the environment it is sailing into. Like a river boat moving out into a rough sea.

Some necessary components of a Strategy

A strategy should at least contain the organisational mission and a vision (or intent). With just these two, if you have the right planning models, you can derive an implementation plan – the military do it all the time.

There are no good or bad styles for describing a mission or vision. Many books offer short versions, with high impact language, others long complex phrases that explain in detail what is required. The two keys to recall are: first, who are the mission and vision actually written for, the senior management only or the whole organisation; second, what style is most appropriate for that audience. A senior management focused mission and vision in a multinational environment, where English is the second tongue for most, needs to be very precise and clear. In the examples below, the vision and mission were targeted at the senior management, not even the middle management. The senior management's collective background and experience was highly political and for some, militaristic – the language was therefore very clear, precise, in a military style and a little verbose.

Mission – What We Do

The mission is normally agreed at the highest level—ours was signed off by the Board—and defines what the organisation should be doing, its purpose for existing in the immediate future 'what we do' and hence by implication, and sometimes more importantly, what you do not do. It can obviously change over time when the environment changes around the organisation or the organisation drifts strategically but, in the immediate future, it is the anchor from which everything else is defined.

> *Example 1. A Mission Statement*: "To strengthen the Alliance through connecting its forces, NCIA delivers secure, coherent, cost effective and interoperable communications and information systems and services in support of consultation, command & control and enabling intelligence, surveillance and reconnaissance capabilities, for NATO, where and when required. It includes IT-support to the Alliances' business processes (to include provision of IT shared services) to the NATO HQ, the Command Structure and NATO Agencies."

The fallout from the mission should be clearer from the diagram in Figure 3. Everything cascades out of the mission until you have details for delivering an outcome.

Vision – What We Want to Be

The Vision statement belongs to the driver of the organisation—normally the CEO—and is his or her vision of what he wants to achieve in a set period of time.

> *Example 2. A Vision Statement:* "By the end of 2014 team NCIA:
>
> Optimises NATO mission success and be recognised as the trusted enabler of information superiority and enterprise excellence;
>
> Uses best practice to develop, deliver, connect and protect capabilities in partnership with other NATO entities, nations and their industry; and
>
> Earns customers' confidence through agility, innovation and by delivering coherent and cost-effective solutions."

In this example, the General Manager (GM)/CEO was pitching his vision at his senior management team. Again, the language may not be something appreciated by everyone in the staff canteen, but it was not meant to, they were not the GM/CEO's audience.

Our organisation was new and an amalgamation of several different entities, some with existing and strong cultures. Our GM/CEO and many in his senior leadership team believed it was critical to bind the senior management team together from the outset, by identifying our Value Proposition (so the senior management had reference to our customer's/stakeholder's perspective of what we delivered for them), defining some Values (by which the senior management would abide) and agreeing Business Rules (by which they would operate). These were principally for the senior management team to glue them together towards a common end: some, and particularly middle management, mistook them as "for the organisation as a whole." They were not and would have been written differently if they had.

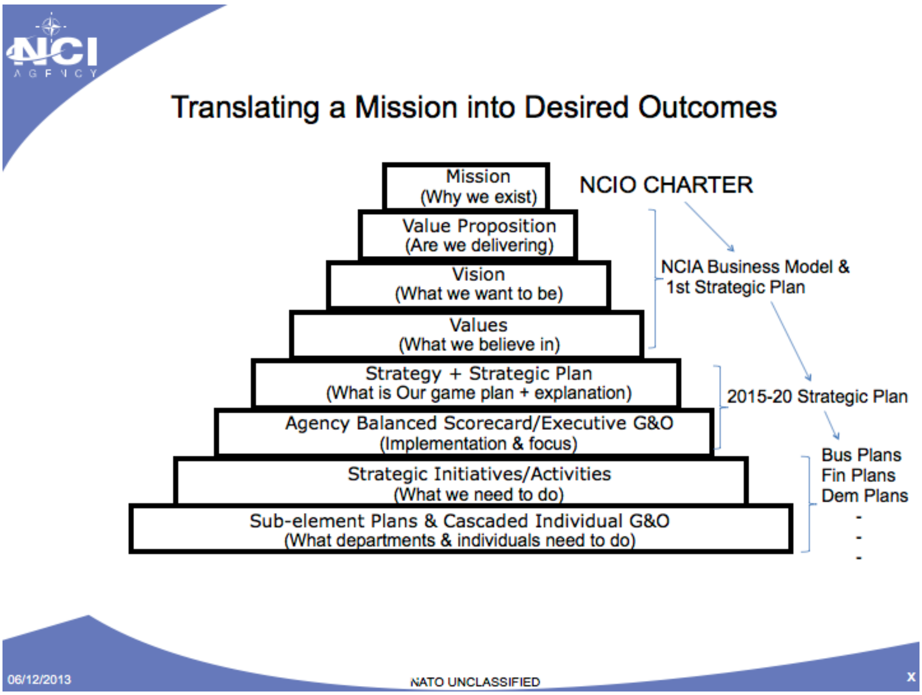

Figure 3: Translating a Mission into Desired Outcomes.[4]

Business Model

These three components, plus the vision, really comprised a Business Model of how the organisation was going to be operated and managed by the senior management team. It was not perfect, but 'good enough' for their purposes and was derived at offsite workshops held and run internally and strongly led by the GM/CEO (who had a very clear view of where he wanted the organisation to be) and key players in his senior management team (who had a good view of what was going wrong internally). Consultants could be used to support this effort, but the experience of the management team allowed us to dispense with them.

Value Proposition - What We Deliver that Matters to Our Customers/ Stakeholders

The Value Proposition [5] comprised of four aspects developed from our customers' and stakeholders' viewpoint. It aimed to identify what was of value to them and therefore what we would need to enhance or maintain (as we shifted from five separate entities into one 'super Agency'), so encouraging our stakeholders/customers to engage us, rather than other providers.

Our Value Proposition package comprised of: our strategy (perhaps better described as our strategic approach to engagement); the products and services we provided; our image in their eyes; and the relationship we had established previously through our long engagements as five separate entities. The derivation of the viewpoints came from pre-merger work and from meetings with customers and stakeholders during the pre-merger decision process. Post-merger, it was verified with the super Agency's national Board members in face-to-face interviews.

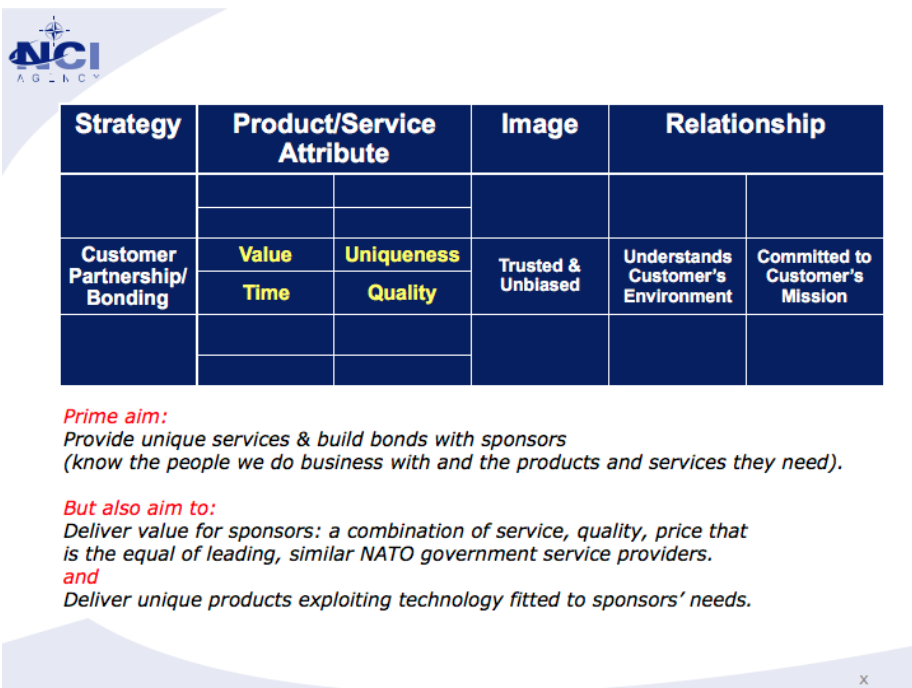

Figure 4: Value Proposition.[6]

Business Rules – How We Will Guide Ourselves as We Progress towards Where We Want to Be

The Business Rules really belong to the senior management team and are their collective agreement on what guidelines they will follow themselves, when working together towards the CEO's vision. They are not required in a strategy, but in the multinational, highly political environment we were operating within, it was a sensible action. In some ways it is a binding professional contract the senior management make with each other and the CEO. In developing the Rules, the GM/CEO did not impose his will on proceedings. The senior managers were therefore able to expose their personal key agenda items and gain support to include them in the rules from their peers. The team guiding the senior management through the process were smart not to allow insertion of items which laid the seeds for tension between management downstream, while equally managing the expectations or strongly held positions of individuals or sub groups in the senior management team. The outcome, the Business Rules, were developed in a collegiate and negotiated manner and so robust.

Example 3. Business Rules:

a. Single point of entry for customers (new requirements and Service Level Agreements (SLAs), based on a single catalogue of services);

b. Reduce overhead to the minimum, needed to govern the new agency;

c. Deliver an optimized internal Shared Services Model, allowing it to be expanded to external customers – we need to capture NATO aspect;

d. Streamline business process in order to optimize a life cycle approach towards coherent capability and service delivery at lower (optimised) cost – ITIL and delivering value by replacing obsolescence;

e. Continuity of service is our priority – coherence management (of priorities, skills, proven technologies and resources) and risk management must ensure our customer satisfaction should not decrease;

f. People are your most valuable asset – we will invest in them and keep lines of communication open;

g. Unless delegated, the GM retains all authority;

h. Standardized and optimized processes for each function of the business;

i. We deliver quality and timely products and services through effective demand and supply management;

j. We will not compete with industry – we will be NATO's intelligent customer to industry;

k. Work as (part of) a NATO Team (i.e. with Support Agency and other entities);

l. We will build an innovative and effective change management organization;

m. Establish clear internal functional dependencies;

n. Adapt acquisition cycles to technologies life cycles; and

o. Align our customer base to support NATO's strategic concept.

The 10 Golden Rules

In part inspired by the development of the Business Rules, the senior and middle management team developed the 10 Golden Rules. These were circulated to every staff member in a small booklet and posted on walls in over 36 dispersed organisational locations across the globe. The 10 Golden Rules aimed to communicate a common approach to staff who had been brought together from different organisations, in order to align them and their efforts under one Agency.

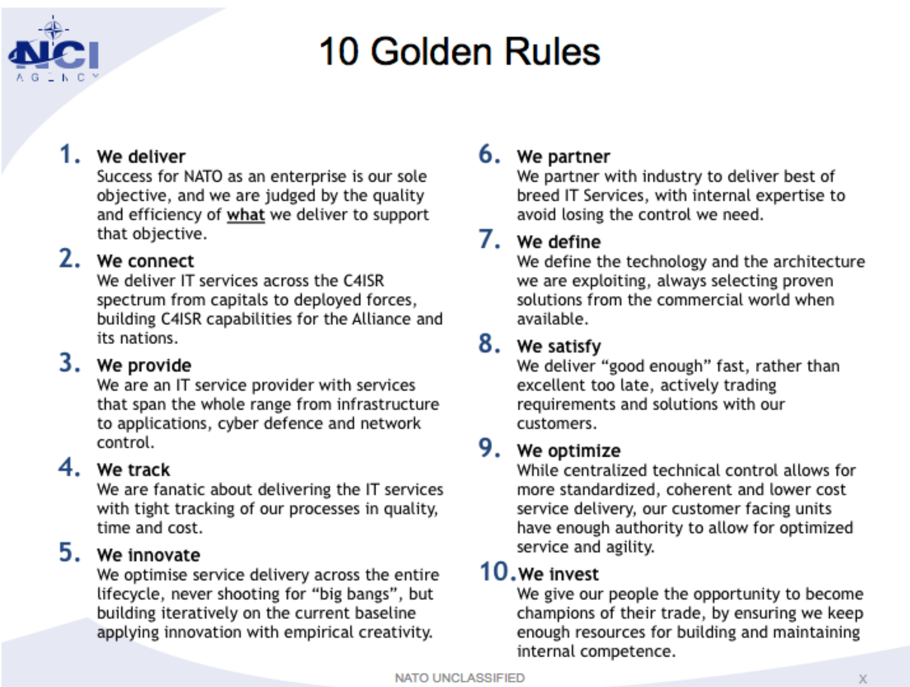

Figure 5: 10 Golden Rules.

Values – How We Want to Be

The values[7] statement belongs to the organisation as a whole and should be agreed by the leadership and senior representatives of the staff, because the values will define over time, the type of culture that will exist in the organisation. It shapes the behaviour of people who will wish to remain in the organisation, influences the behaviour expected of future employees, the behaviour the organisation will exhibit to others outside and, in a way, the behaviour expected from others interacting with the organisation.

The values need to be aligned with the strategic change the organisation will move toward in repositioning and reorganisation. If it does not, the values of the organisation could be at odds with the ability to change and reposition.

> *Example 4. Values:*
>
> *Accountability*
>
> We are responsible for our actions and decisions, or failure to act, and we accept responsibility for the consequences of their outcomes.
>
> *Commitment to Operations*
>
> We are professional and prepared to deploy in support of NATO's operations. We are prepared to go that extra mile to support people deployed on operations.
>
> *Excellence*
>
> We are professionals who are entrusted to carry out our duties to the utmost of our abilities for the common good. We continue to strive to maintain our competencies and skills and to apply them effectively and efficiently.
>
> *Impartiality*
>
> We serve the Alliance's interest above our national and personal interest.
>
> *Integrity*
>
> We are committed to maintaining the highest standards of professional and personal conduct in such a way as to uphold the trust and confidence of the citizens of our member states, as well as to our customers and stakeholders.
>
> *Loyalty*
>
> We are faithful and true to the enduring role of the Alliance, the principle of unity upon which it is founded, and in support of the current and future challenges it faces; we are committed to NATO and the objectives it wants to achieve. We encourage open and free dialogue to the point of the decision; once a decision is taken, we fully embrace it.
>
> *Respect*
>
> We listen to each other's opinion and point of view. We recognize and value diversity of our people whether civilians or military.

Team Spirit

We act as a team; people are the Agency and the Agency invests in its people and families.

Transparency

We are transparent in our communication with each other, our oversight bodies and customers.

Leadership

Responsibility, Trust and Courage. We lead by example. We are committed to creating an environment in which the staff is empowered to deliver innovative, (cost-) effective solutions. We will give clear guidance to our people. We will stand by our unbiased advice and our people. We maintain an open and trusted workplace, where dialogue and communication are encouraged.

Similarly, if the value changes required are so marked from previous values and huge efforts are not made to inculcate these new values into the organisation, the staff will reject the strategic change. Without staff support, the organisation will be ill suited to its new place in the environment and therefore need to undergo more change and repositioning or a review of its values – though these take so long to change, a repositioning and restructuring may be quicker.

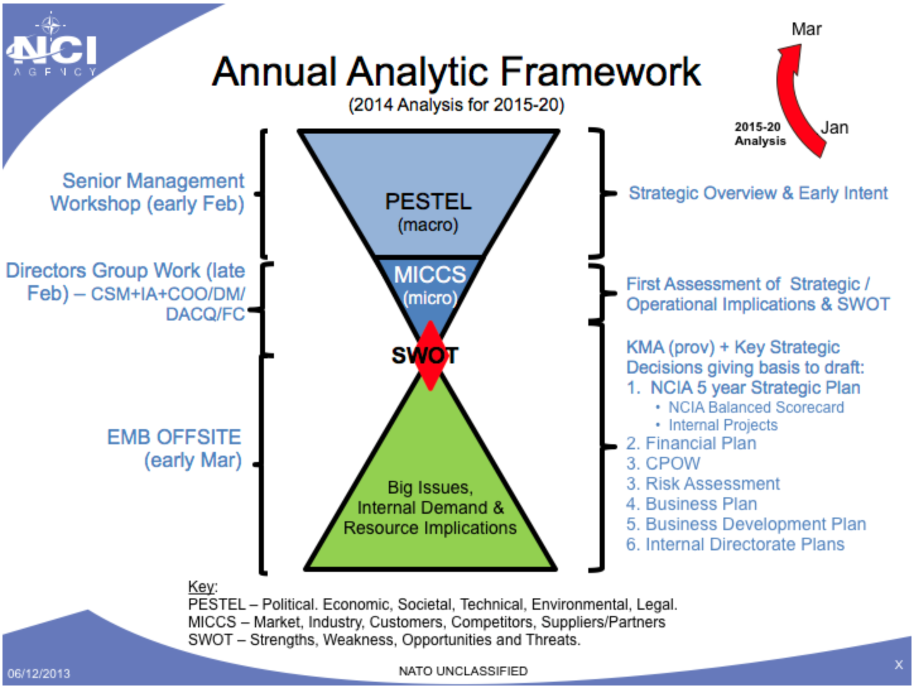

Figure 6: Analytic Framework used to develop Strategic Plan and other documents.[8]

Supporting Analysis

The work described above laid the foundations at the start of the formation of a new 'super Agency.' Parts of the work, like values, form the fabric of the organisation and take some time to change. The new strategy will initially be rolled out while old values remain in place. As described above, if the staff do not buy in to a new strategic change (and the staff are not replaced) there will be problems in implementation. A new strategy therefore needs to be built with this understanding present.

A way of minimising the negative impact of this, is to engage middle management in the development of the strategy. Their engagement needs to be confined to appropriate matters: when everyone in the management chain is a 'strategist,' the organisation can waste significant resources and diverge from implementing its strategic plan, its objectives and supporting initiatives.

The Analytical process the middle management were most involved in was the development of a PESTEL Analysis.[9] Through a workshop aimed at the senior management but engaging their middle management teams, middle managers lead the development of the PESTEL and its subsequent strategic overview, enabling the senior management to draw conclusions and derive the organisational intent, within that environment.

These were then examined from a different perspective (a MICCS analysis [10]) by a sub-group of the senior management (a Directors Working Group) to derive both a first assessment of the strategic and operational implications and an early assessment of Strengths, Weaknesses, Opportunities and Threats (SWOT).[11] From this information some 'big issues' could be identified which would need to be addressed by the entire senior management team at an offsite meeting.

At the offsite, senior management collectively drew conclusions from the previous analytical work, addressed the big issues, examined anticipated strategic goals and objectives and future workload. Each senior manager also presented the implications for internal demand and resources in their area that would need to be addressed. The senior management then drew up provisional Key Management Assumptions (KMA) [12] and made key strategic decisions. After the offsite, senior managers had 10 working days to scrutinise the provisional KMA and the strategic decisions, before re-conveying to tweak and collectively agree them.

Once agreed, the staffs had enough information to draft a whole number of interlocking and supporting documents: the next five-year Strategic Plan, the three-year Financial Plan, a Consolidated Programme of Work; initiate/update a Risk Assessment; the next annual Business Plan and its Business Development Plan; and, if they chose to, individual Directorate Plans. These were agreed at a senior management meeting and, where necessary, submitted to the Board for notation by the nations.

Risk Assessment leading to Risk Management

Risk Assessment is an important part of the analysis process and, when done, enables Risk Management.[13] From the assessment, a Risk Management table can be built. It must be built before the strategy is launched because some risks could arise as the strategic plan is implemented and so need immediate attention.

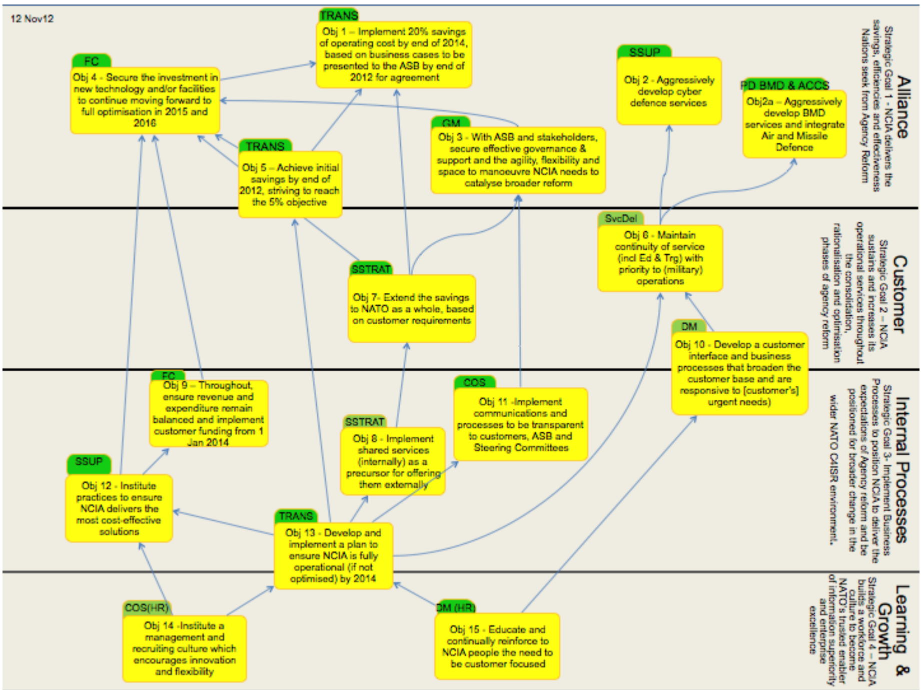

Figure 7: A Strategic Map based upon Kaplan & Norton's model.

Strategic Plan Development

Much of the work developed for the senior management offsite is brought into the Strategic Plan; the heart of which is a diagrammatic representation of the strategy. Given the nature of the Agency, we actually developed the plan in two forms, a Kaplan & Norton like Strategy Map[14] (see Figure 7) and a military style Campaign Plan[15] (see Figure 8), the key difference between the two being the temporal aspect of the Campaign Plan, which enabled the targets of each strategic objective to be placed along a timeline.

The Strategic Goals in each of the four views—Alliance, Customer, Internal Processes and Learning & Growth—where written by the GM/CEO and his key strategic advisors. They framed the strategic objectives. Each strategic objective was then assigned by the GM/CEO to a senior manager and each senior manager had at least one strategic objective assigned to them to champion, thus ensuring collective responsibility. The Chief Strategy Officer then worked with the senior manager Champion of a strategic objective (and she/he with her/his peers) to derive what targets needed to be achieved, by when, to deliver the strategic objective. During this engagement, strategic initiatives were identified (catalytic projects to stimulate change) which would need to be undertaken (and resourced) as part of that strategic objective delivery.

By delivering these targets, the individual senior managers would play their part in the overall delivery of the strategic objectives and hence the higher strategic goals. In turn, this would lead to the delivery of the GM/CEO's Vision and so the overall Mission of the organisation.

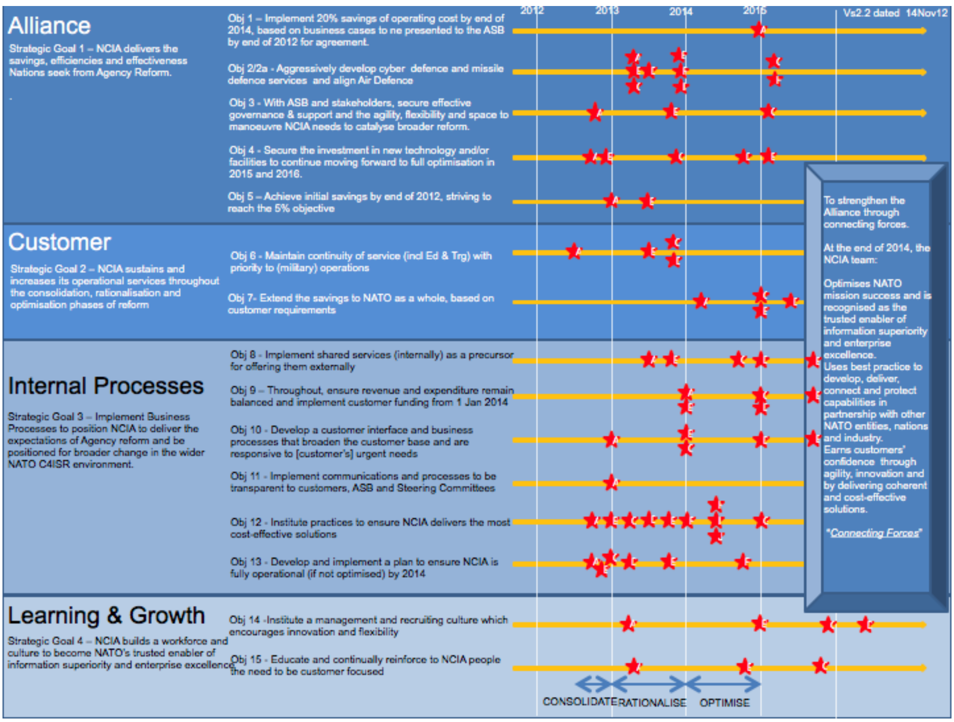

Figure 8: A strategic Campaign Plan based upon military Campaign planning models.

Balanced Scorecard

The Agency initially developed a Balanced Scorecard [16] again using Kaplan & Norton principles. However, in practice, this was abandoned quite soon after it was introduced, because the GM/CEO and other senior managers questioned its utility when the Campaign Plan was found more effective in communicating the progress the senior leadership were making in the delivery of the strategy.

Strategic Plan Contents

The Strategic Plan needs to be written with the organisation and its stakeholders in mind. Our environment was mixed civilian (scientists, engineers, project managers) and military. Our principle customers were military and our primary stakeholders – diplomats and politicians. The plan therefore contained parts that may not be found in normal strategic plans: a 'Strategic Intent' statement and Scheme of Manoeuvre plus Main Effort (see Figure 9). These are usually found in military orders documents and create the boundaries and framework to enable military leaders to use their initiative when the circumstances they find themselves in prevent them from achieving the specific task they have been asked to achieve as part of the Commander's higher intent.

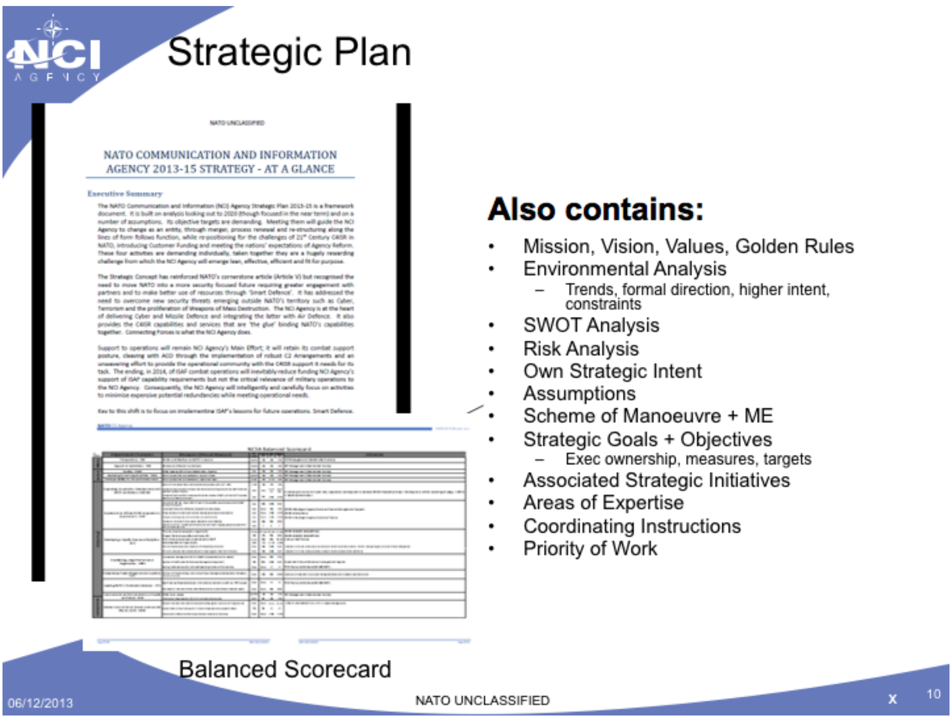

Figure 9: A Strategic Plan contents.

Strategic Plan Implementation

Day to day implementation of the Strategic Plan should be driven by the delivery of the strategic objectives and their targets. Measuring, monitoring and reporting of progress against these targets (and their higher strategic objectives) needs to be done as fairly and judiciously as possible and provided to the senior leadership. This could be done in many forms, such as regular items on board meetings or regular reports. It should be provided by an independent assessment body that can verify and comment on the achievements.

In our organisation, progress against these strategic objectives and their underpinning targets was reported to the GM/CEO quarterly in a written report by the Chief Strategy Officer—the only Board Member who did not have a strategic objective assigned to him—in order to remain relatively impartial.

The Chief Strategy Officer's assessment was made in conjunction with the strategic objective Champion (and, if needed, the senior manager who was charged with delivering the specific target within that Champion's strategic objective) and then validated (or not) by the Chief Strategy Officer. Senior management participated in this process constructively, perhaps helped by the fact that the need to deliver individual targets and strategic objectives where included in the senior managers' performance appraisals.

Over the quarters, the Campaign Plan was updated to show progress visually. If a target was met, it was shown on the Campaign Plan as Green, if partially achieved, Amber and if not achieved, Red. This made for interesting Senior Management Meetings and offered individual senior managers the opportunity to explain their progress and secure further resources or support when their progress was holding up the progress of others, or vice versa.

Over time, the organisation introduced a cascading Performance Management System across the organisation. In theory this offered the management chain the ability to cascade the senior managements' strategic objectives down through the organisation to lower levels as part of the Performance Management process.

Some Lessons Identified

If faced with the need to reposition and simultaneously reorganise, treat the two differently. Build a strategy to reposition, and a separate Change Management Plan to reorganise and manage the implementation of the re-organisation. This subordinate Change Management Plan should be implemented through a subordinate management team reporting to the strategy implementation management team.

When developing the strategy, its subcomponents or organisational proposals that derive from it constantly refer back to the mission statement. There will be pressure or temptations to 'do other stuff.' This could be because an opportunity arises or someone wants to continue an internal 'pet project' when they perhaps should not. Refer back to the mission before deciding to 'do other stuff' or continue doing 'pet projects'; if the activity does not align with the mission, do not waste any more resources on it.

Middle level management were not brought into the strategy development process as much as they would have liked. I still believe that was the right decision. However, sadly, they were not communicated to properly by their line senior management. They did not know, appreciate or fully buy in to the direction decided by the senior management: when middle managers needed to implement lower order objectives, this was not done as well as it could have been.

Middle Management do need to be bought into the future envisaged by a strategic change, but they are not the senior leadership of the organisation. If the middle management is strong, they will have great ideas which should be examined, selected and used appropriately by senior management. However, securing middle management 'buy in' has its limits. If not tempered and balanced with the need to execute as per the senior leadership's direction, a 'good ideas club' forms within the middle management. If allowed to, this club will create detrimental uncertainty and delay the implementation of the strategic change.

An internal change management programme will throw up initiatives which need to be funded. This can be managed and delivered through a Strategic Initiative Programme. However, resources do need to be anticipated, identified and allocated to this Programme from the outset. If these resources cannot be secured, the whole strategic venture becomes undermined and, as we discovered, two things happen. One, senior managers start to alter the direction and style of change to match their lack of resources. Or two, human nature in its worse forms emerges as individual senior leaders, under pressure to deliver performance appraisal objectives linked to their contracts, turn on each other or their senior/ junior management. The really sensible thing to do if the resources cannot be secured is postpone the strategic change or redesign the whole schema so no additional resources are required.

The Risk Assessment was perhaps an analysis step which ought to have come earlier in our strategy development process. I would suggest within the senior management's strategic analysis, concurrent with the SWOT and MICCS analysis. This then gives input to the whole senior management team discussions at the offsite and so shapes the subsequent planning and enables proper risk anticipation and risk management during strategy implementation. Of note also, if strategic implementation starts to go off course and risks arise, the senior management understandably shift their focus onto the 'management of the risk' rather than the management of the strategy implementation: if risk management is not then done proportionally and sensibly by a strong CEO, the senior management's energy is dissipated on risk management rather than strategy management. Implement the strategy well, giving it full senior management and especially GM/CEO attention, and the risk becomes manageable. Focusing too much on the risk leads to strategic drift and a strategic spiral downwards which is hard for a senior management team to extract from.

The implementation methodology is simple. However, there are tools available on the market which, if used incorrectly, can make it a complex challenge. Performance Appraisal systems can take senior leader's objectives and cascade them down through an organisation's structures easily to every manager, in theory making each manager's achievements part of the collective whole. I would just advise that if the organisation's management does not understand the concept of breaking down their senior leadership's objectives into sub-objectives appropriate for their junior managers, one ends up with chaos.

Conclusions

This paper has tried to show how an organisation's management derived its strategic direction and all that falls out of that, following a merger of five smaller organisations into a super Agency. It was in many ways a 'green field' development. There were some well-known tools and techniques used but, primarily, these were tweaked or added to by other methods, less common, because that was appropriate for the audience of the strategy, its customers or its stakeholders.

The strategy development was a fairly huge undertaking and, though well developed, was not that successful in implementation, primarily due to lack of a funded strategic initiative programme for almost 18 months after the organisational strategy implementation began. The reader who has undergone a strategic management change process may believe the workload was excessive and far too cumbersome. In retrospect we could have avoided some work—the Balanced Scorecard for example—though I believe the effort required to secure the support of the senior management (which came from five disparate organisations and may not have been entirely enamoured with the merger) was worth the effort. Subsequent shortfalls in implementing the strategy properly were not as a consequence of the work done to develop the strategy or the strategy itself. Resourced from the outset, the senior management team would, I have no doubt, delivered the targets, strategic objectives and strategic goals of the strategy, just how they were expected to do when they started.

Acknowledgements

The senior management team from NCI Agency (2011 – 2013) who taught me more that I can possibly thank them for and tolerated me.

References

[1] Inspired by some of the concepts and ideas from Michael Porter, *Competitive Strategy: Techniques for Analyzing Industries and Competitors* (New York: Free Press, 1980).

[2] Diagram is intellectual property of Que4 Consultancy – "When the Decision Really Matters."

[3] Tuckman's Team Development Model, 1965. The forming–storming–norming–performing model of group development was first proposed by Bruce Tuckman in 1965, who said that these phases are all necessary and inevitable in order for the team to grow, face up to challenges, tackle problems, find solutions, plan work, and deliver results.

[4] Diagram developed from concepts proposed by Robert S. Kaplan and David P. Norton as part of their Balanced Scorecard model in their book: *Strategy Maps – Converting Intangible Assets into Tangible Outcomes* (Boston, MA: Harvard Business School Publishing, 2004).

[5] The phrase "value proposition" (VP) is credited to Michael Lanning and Edward Michaels, who first used the term in a 1988 staff paper for the consulting firm McKinsey & Co.

[6] The diagram is intellectual property of Que4 Consultancy – "When the Decision Really Matters."

[7] The values guide the perspective of the organization as well as its actions. Writing down a set of commonly-held values can help an organization define its culture and beliefs. When members of the organization subscribe to a common set of values, the organization appears united when it deals with various issues. See for example Leyla Norman, "What Is an Organizational Value Statement?" *Chron*, 12 March 2019, https://smallbusiness.chron.com/organizational-value-statement-23848.html.

[8] Diagram is intellectual property of: Que4 Consultancy – "When the decision Really Matters."

[9] Francis Aguilar is credited with developing PEST though it has developed since and now is a technique used for analysing the external environment surrounding an organisation when investigating business change. PESTLE is an acronym which stands for Political, Economic, Sociological, Technological, Legal, Environmental.

[10] MICCS Analysis was devised by the Chief Strategy Officer of the organisation and like a PESTEL Analysis, is a technique for analysing the specific close in environment of the organisation. MICCS is an acronym which stands for Market, Industry, Customers, Competitors, Suppliers/Partners. MICCS Analysis is intellectual property of Que4 Consultancy.

[11] SWOT Analysis is a useful technique for understanding your Strengths and Weaknesses, and for identifying both the Opportunities open to you and the Threats you face. Used in a business context, it helps you to carve a sustainable niche in your market. See for example "SWOT Analysis: How to Develop a Strategy for Success," *MindTools*, https://www.mindtools.com/pages/article/newTMC_05.htm.

[12] Key Management Assumptions were the list of criteria upon which the Financial Control would build a Financial Plan and the Chief Operating Officer the Business Plan. It was normally about 12 criteria including for example: anticipated number of staff; projected inflation; and anticipated volume growth/decrease. In the form it developed I have not seen similar elsewhere and must assume it was originally devised by Mr Paul Ballinger, a successful Financial Controller in NATO.

[13] In business, risk management is defined as the process of identifying, monitoring and managing potential risks in order to minimize the negative impact they may have on an organization. See for example the international standard "Risk management – Guidelines," ISO 31000:2018.

[14] The Kaplan & Norton structure did not fit neatly with the organisation, so was tweaked.

[15] Developed from the concepts and principles taught at the United Kingdom's Ministry of Defence's Joints Services Command and Staff College when the author was a student (1999-2000) and later a member of the Directing Staff (2003-2004.)

[16] The Balanced Scorecard (BSC) was originally developed by Robert S. Kaplan of Harvard University and David P. Norton as a framework for measuring organizational performance using a more *Balanced* set of performance measures in their famous book Robert S. Kaplan and David P. Norton, *The Balanced Scorecard: Translating Strategy into Action* (Boston, MA: Harvard Business Review Press, 1996).

About the Author

The author was the Chief Strategy Officer for NATO Communications and Information Agency (NCI Agency) (2012 – 2017) and one of the principle leaders in the merging of five NATO information technology and programming agencies into a NATO super Agency, responsible for delivery of all of NATO's IT capabilities and services. He worked prior to that as the Chief Strategy Manager for one of these Agencies (2009-2012) and was their executive lead for the merger. In NCI Agency, he worked directly to the GM/CEO and was a member of the Executive Management Board of the Agency responsible for implementing the Strategy.