



Chief Strategy Officer

*Collaborative*SM

**How To: Define, Align and Prioritize
the Best Strategic Moves**

Today's Host



Erica Olsen

CEO, Co-Founder and Principal Strategist

OnStrategy

Today's Guest



Bryan Sergeant

CEO, President

Innovex Management

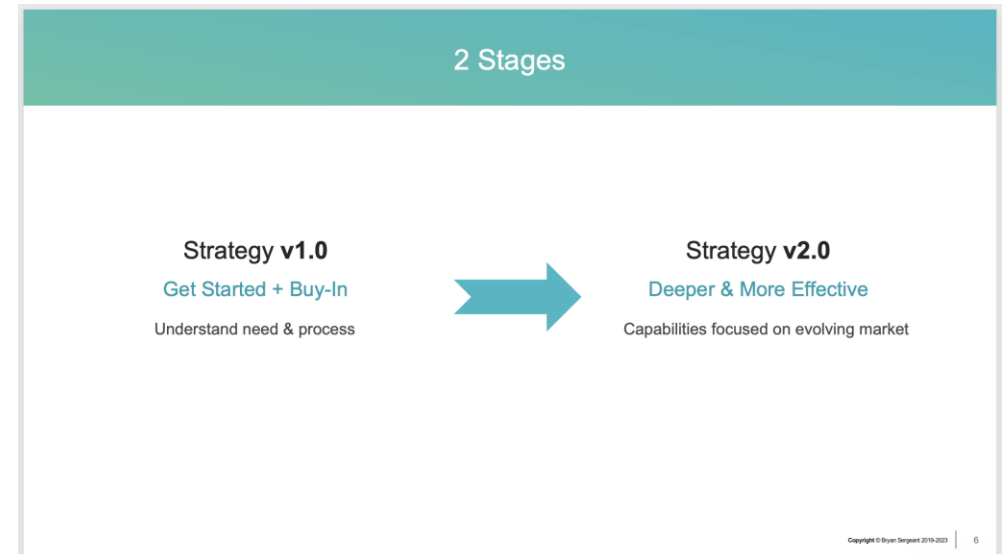
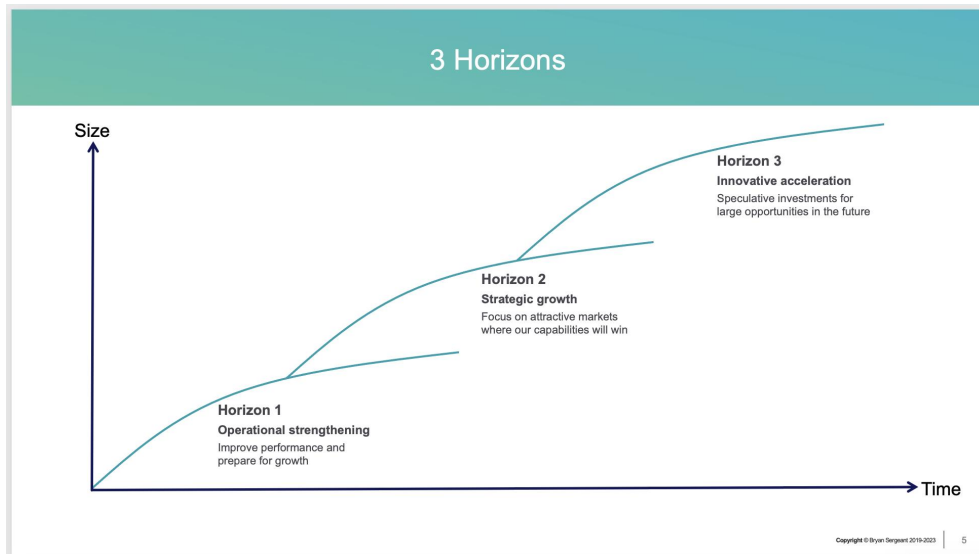
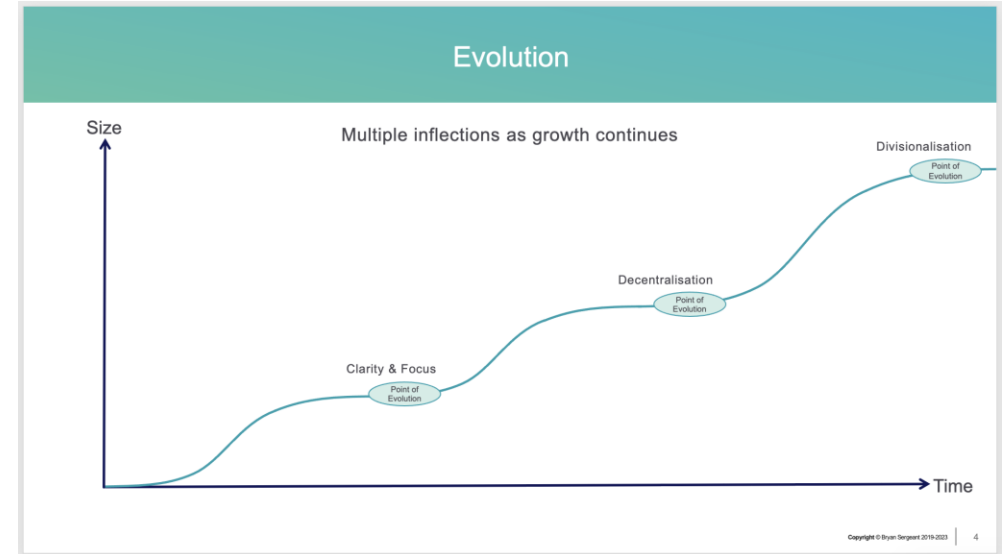
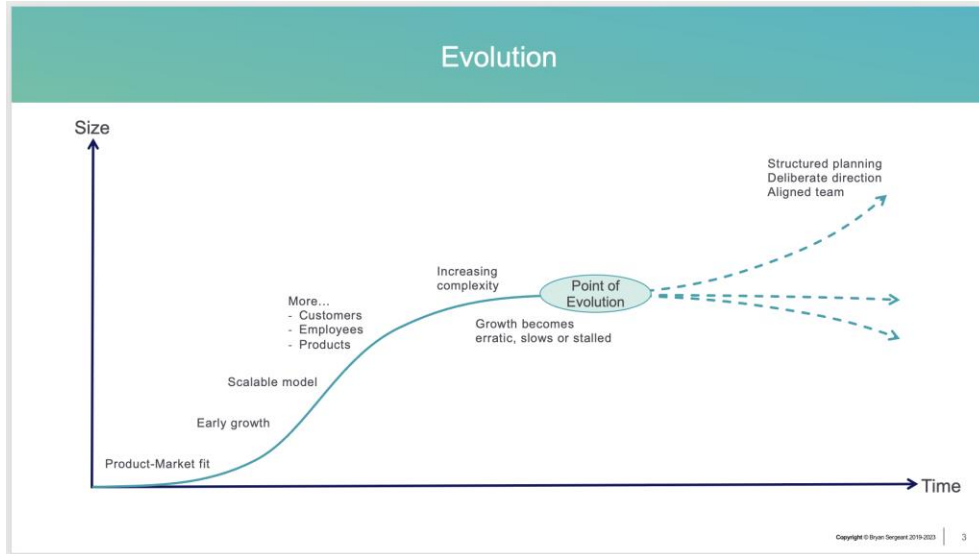
30 years in senior / board roles from Start-ups to Corporates
15 years consultant and coach on Strategy & Leadership

www.linkedin.com/in/bryansergeant

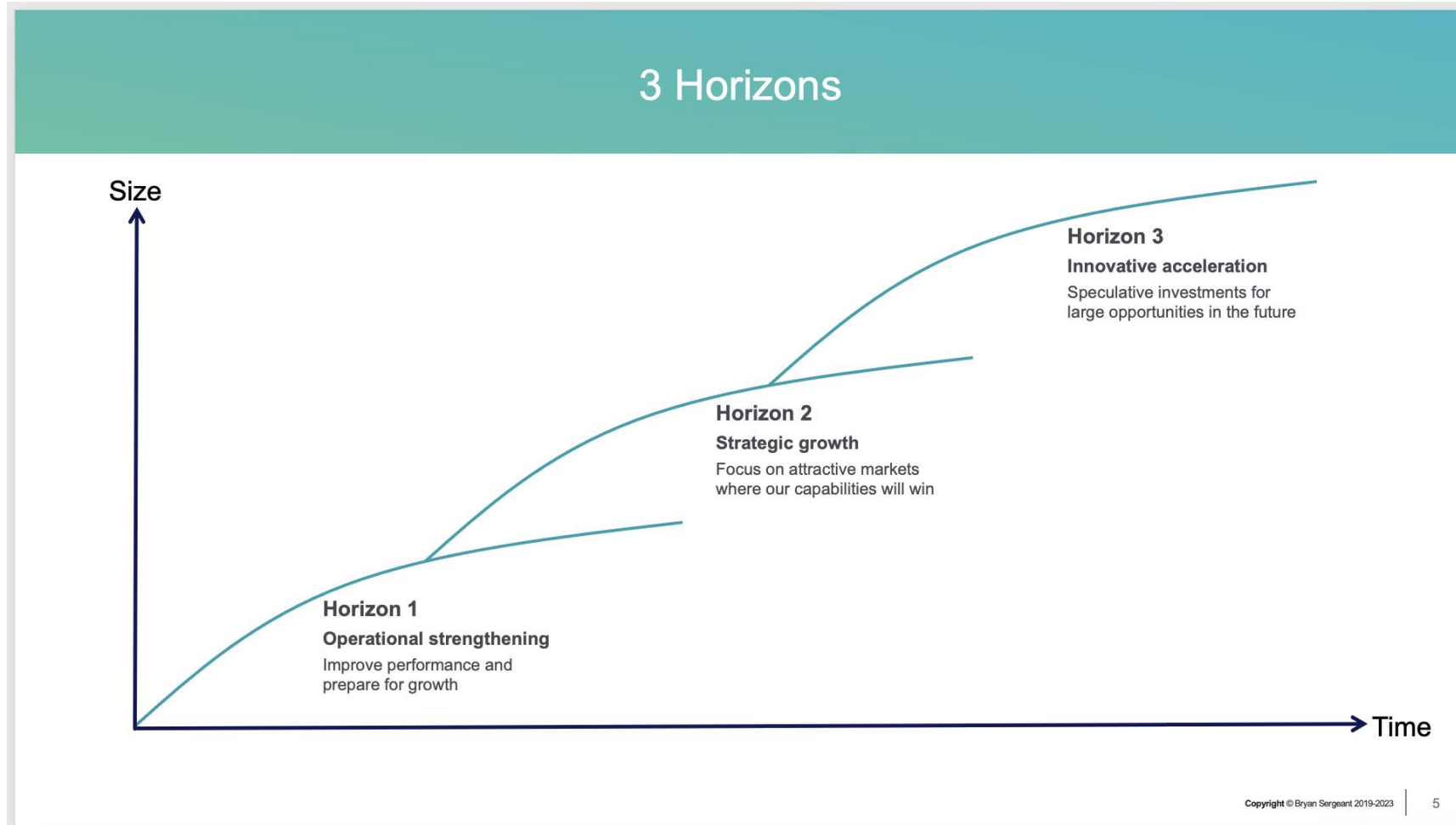
bryan.sergeant@innovexmanagement.co.uk

Horizon thinking and getting top-team attention

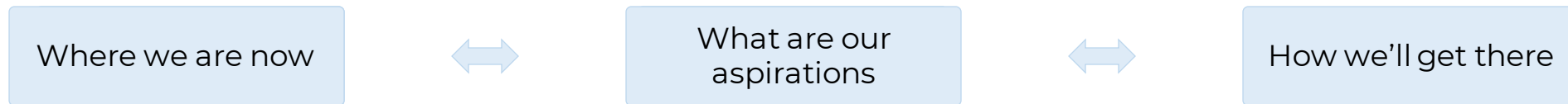
From last time...



From last time...



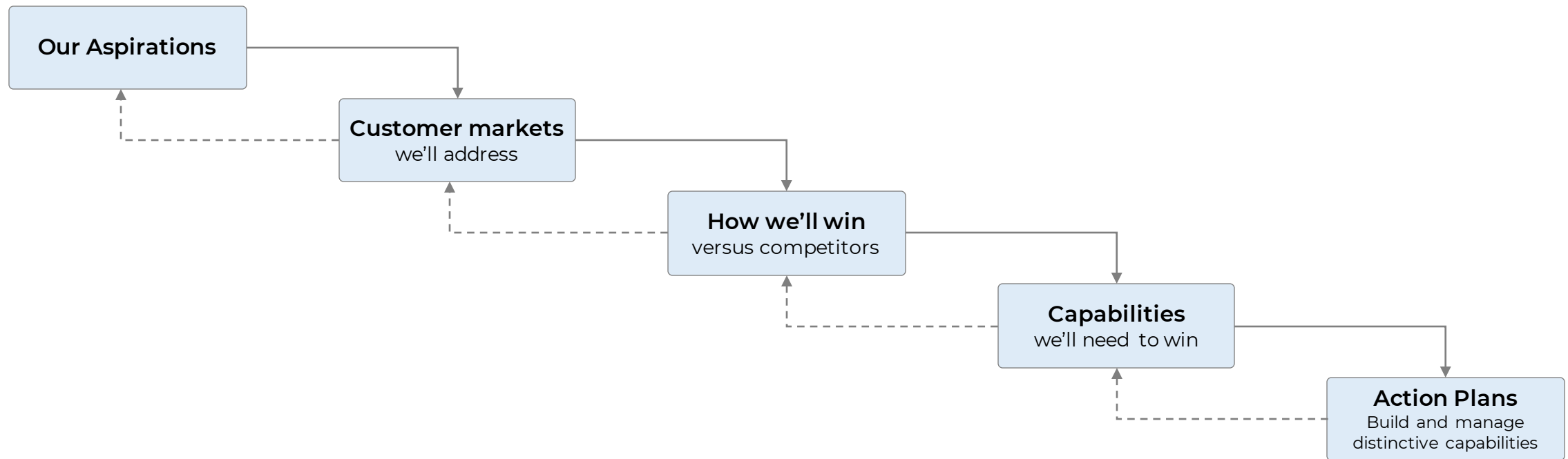
Strategy



Strategy



Strategy



Understanding your start-point

Business Management Framework (BMF)

From The Field



Brett Puterbaugh
Special Projects Manager

<https://www.linkedin.com/in/brett-puterbaugh-30358741/>

It Takes a Village

<https://joinourvillage.org/>

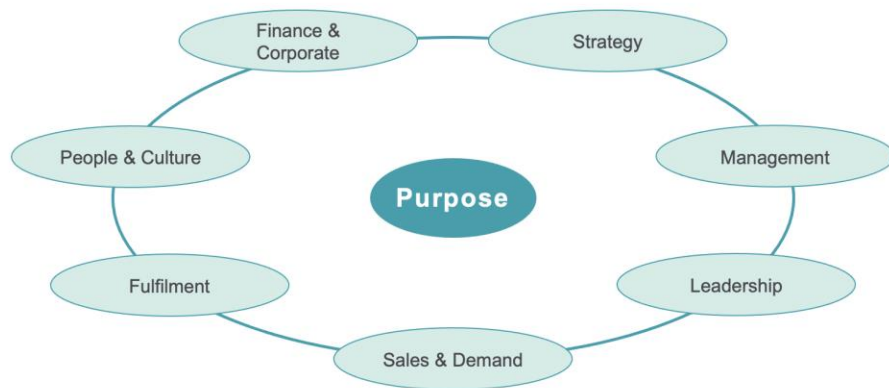


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From last time...

Assessments



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Business Management Framework (BMF)

Momentum	Engagement	Drive	Acceleration & Agility											
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Our Performance now	9													
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Our Performance now	5													
Structure	Organisation & People	Standardisation	Control											
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Our Performance now	5													
Importance to us now	9													
Our Performance now	6													
Importance to us now	10													
Our Performance now	4													
Foundation	Vision & Mission	Values & Ethos	Strategy & plans											
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Business Management Framework (BMF)

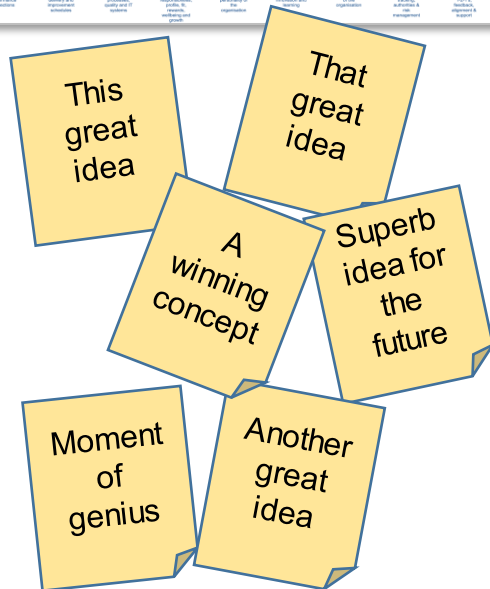
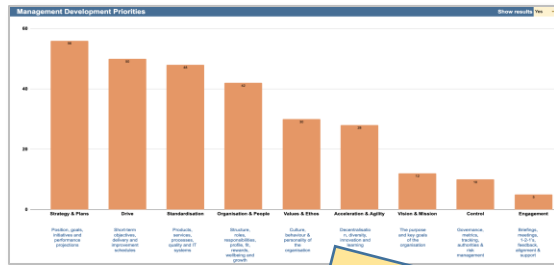
Momentum	Engagement Briefings, meetings, 1-2-1's, feedback, alignment & support	Drive Fulfilment schedules, OKRs, and tool development	Acceleration & Agility Decentralization, diversity, innovation and learning
Structure	Organization & People Structure, roles, responsibilities, fit, rewards, wellbeing & growth	Standardization Products, services, processes, infrastructure, quality and IT	Control Governance, metrics, tracking, authorities & risk management
Foundation	Vision & Mission The purpose & longer-term goals of the organization	Values & Ethos Culture, behavior & personality of the organization	Strategy & plans Goals, positioning, initiatives and performance projections

Business Management Framework (BMF)

Observations from the assessment earlier this week...

Turning the output from the BMF into Initiatives

Turning Priorities to Development Programme



A		C	D	E	F	G	H	I	J
1	Initiatives and Prioritisation								
2									
3									
4			Selection criteria						
5			Benefit	Quick & Easy & Cheap					
6									
7	Initiatives				Owner		Days of work		
8	Update website		4	10	Person 3		2.0		
9	Introduce flexible working hours		1	10	Person 1		4.0		
10	Deploy ISO9000 in factory		3	1	Person 1		4.0		
11	Deepen market understanding		1	9	Person 1		4.0		
12	Acquire sales agent in Japan		1	6	Person 1		4.0		
13	Recruit sales team in Australia		6	7	Person 2		2.0		
14	Implement upgraded Safety Policy		7	10	Person 3		2.0		
15	Raise £2m additional investment		7	4	Person 1		2.0		
16	Develop employee engagement		7	7	Person 4		1.0		
17	Management & leadership development		1	9	Person 4		5.0		
18	Upgrade KPIs and reporting		7	5	Person 2		1.0		
19	Refine governance processes		4	6	Person 4		1.0		
20	Introduce OKR methodology		8	3	Person 3		4.0		
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Calendar of Events

Always Thursdays

Remaining May Session: **PRO** Members Only

May 25 @ 10 a.m. PT - "Ask Us Anything" Workshop *[Pro only]*

June 8 @ 8 a.m. PT - "Ask Us Anything" Workshop *[Pro only]*

June 15 @ 10 a.m. PT - "**How-To**": Identify results that are meaningful and motivating: **KPIs, Measures and Metrics** *[Pro only]*

Upcoming General Sessions

June 1 @ 8:00 a.m. PT – Identifying results that are meaningful and motivating: **KPIs, Measures and Metrics**

July 6 @ 8:00 a.m. PT – **1st Thursday session is dark! No session.**
2nd/3rd/4th Thursday Pro Sessions are a go diving into member generated "Ask Us Anything"

August 3 @ 8:00 a.m. PT – **Connecting Strategy to the Project Level**

Final thoughts



Expect all of today's materials and agendas in your inbox.

We'll email by tomorrow with links to resources we talked about, plus what's coming up this month!



Invite - Share

If you found value in today's session then share it with a friend or colleague who could benefit as well.



Suggestion for topics? Feedback?

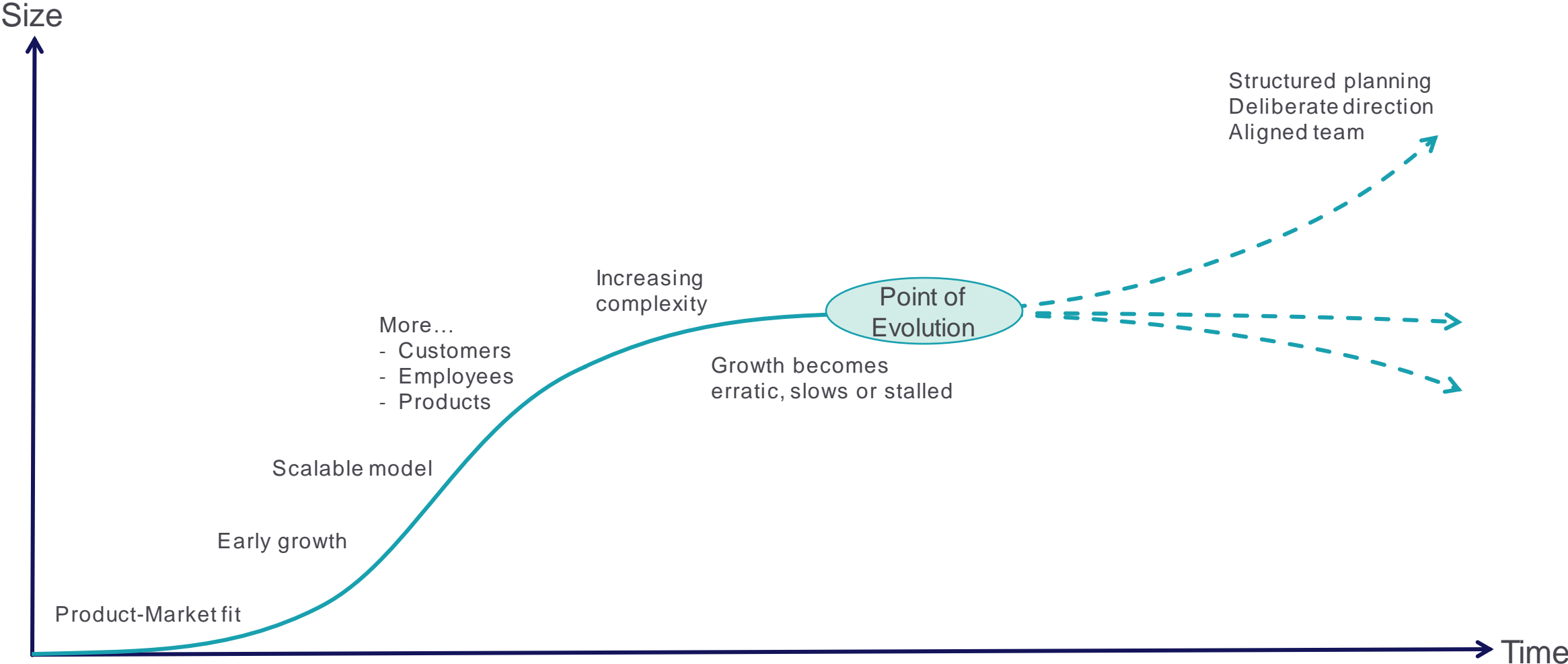
Drop us a line anytime – let us know what you think and what you'd like to tackle as a group.

collaborative@onstrategyhq.com

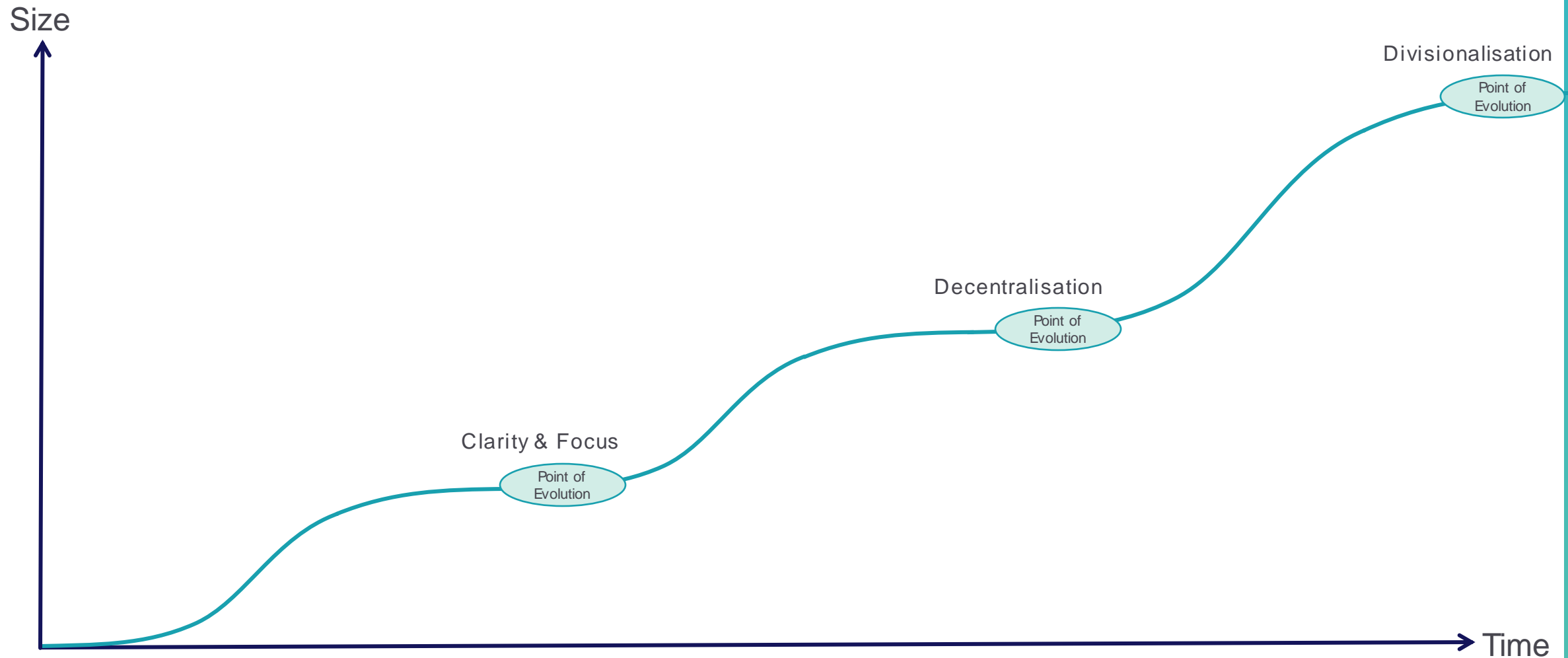
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APPENDIX

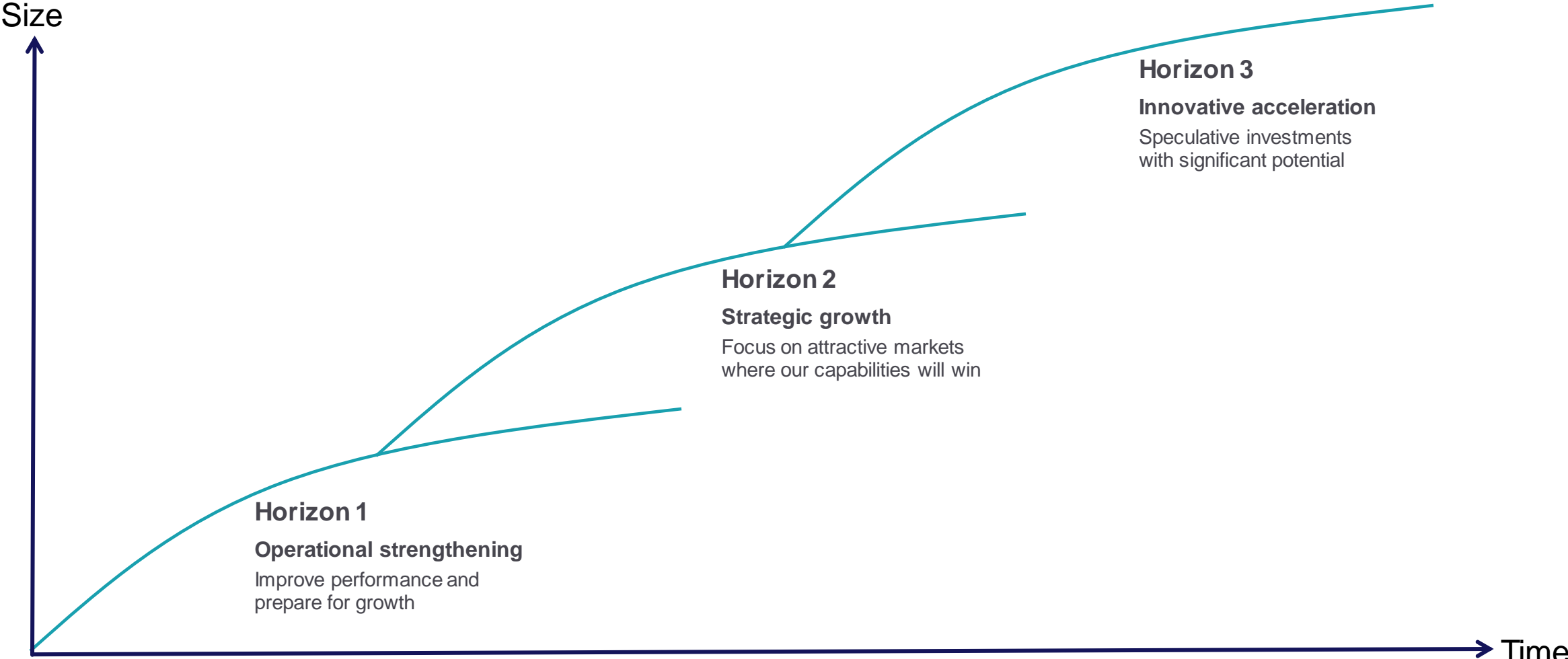
Evolution

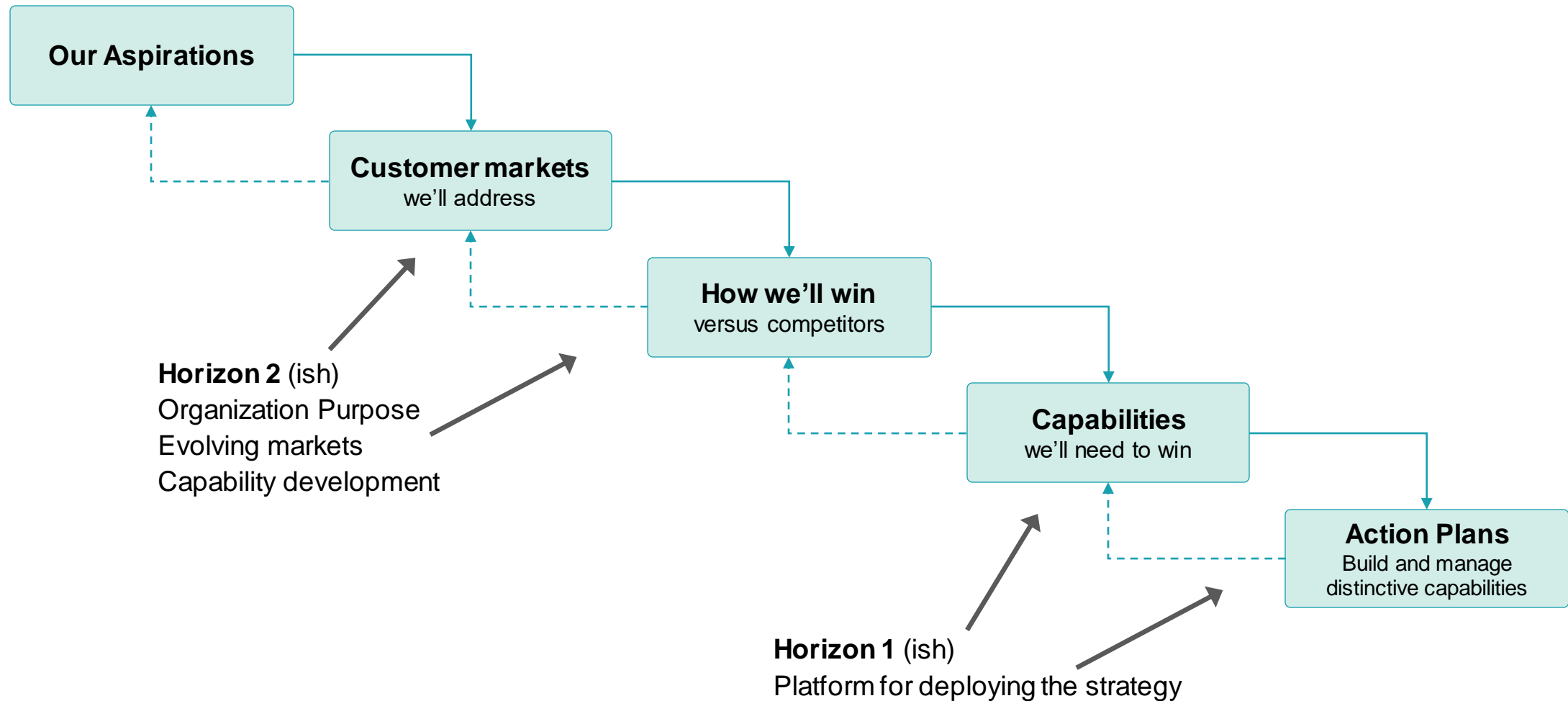


Multiple inflections as growth continues



3 Horizons





2 Stages

Strategy v1.0

Get Started, Get Buy-In

Understand need & process



Strategy v2.0

Deeper, More Effective

Capabilities focused on evolving market

Assessments

