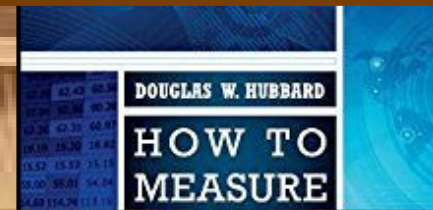
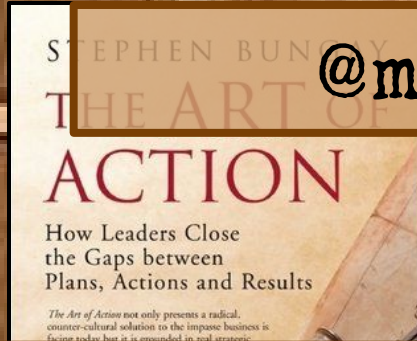




Strategy Deployment,
Portfolio Planning,
& Organization Design
...Oh My

@mattbarcomb | #lakcl7



Want these slides?

Email: info@IntentionallyAdaptive.com

A photograph of a turtle on a sandy surface. The turtle's head is in the foreground, looking towards the viewer. Its shell is a mix of brown and tan colors. The background is a blurred, natural outdoor setting. Two text boxes are overlaid on the image: one at the top center and one at the bottom center.

Empowered?

Goal: Sense & respond from any position.

A close-up photograph of a man with a distressed expression, holding his hands to his head. Three thought bubbles are overlaid on the image, each containing a business strategy term. The bubbles are connected to the man's head by thin lines and small circles, suggesting a mental struggle or a complex decision-making process.

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.”

Artifact

Output

Role Level

Company

Vision

**Societal/Industry
Improvement
(5-10 years)**

**Strategic
Leadership**

Intents

**Market
Problem Hypotheses
(3-5 years)**

**Strategic
Leadership**

Products

Initiatives

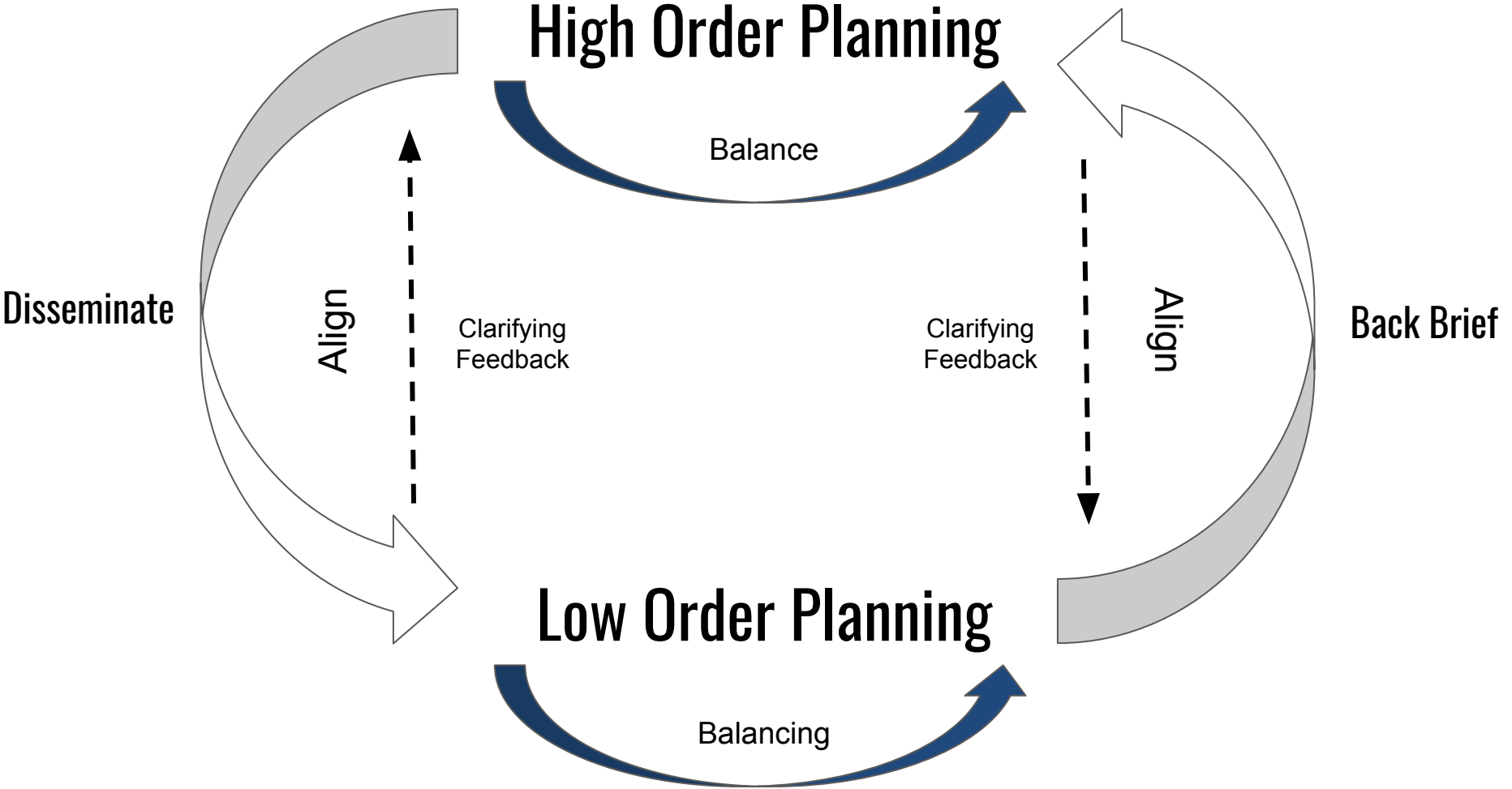
**Customer/User
Problem Hypotheses
(12-18 months)**

**Operational
Leadership**

Options

**Customer/User
Solution Hypotheses
(2-12 weeks*)**

**Tactical
Leadership**



High Order Planning

Balance

Disseminate

Align

Clarifying Feedback

Clarifying Feedback

Align

Back Brief

Low Order Planning

Balancing

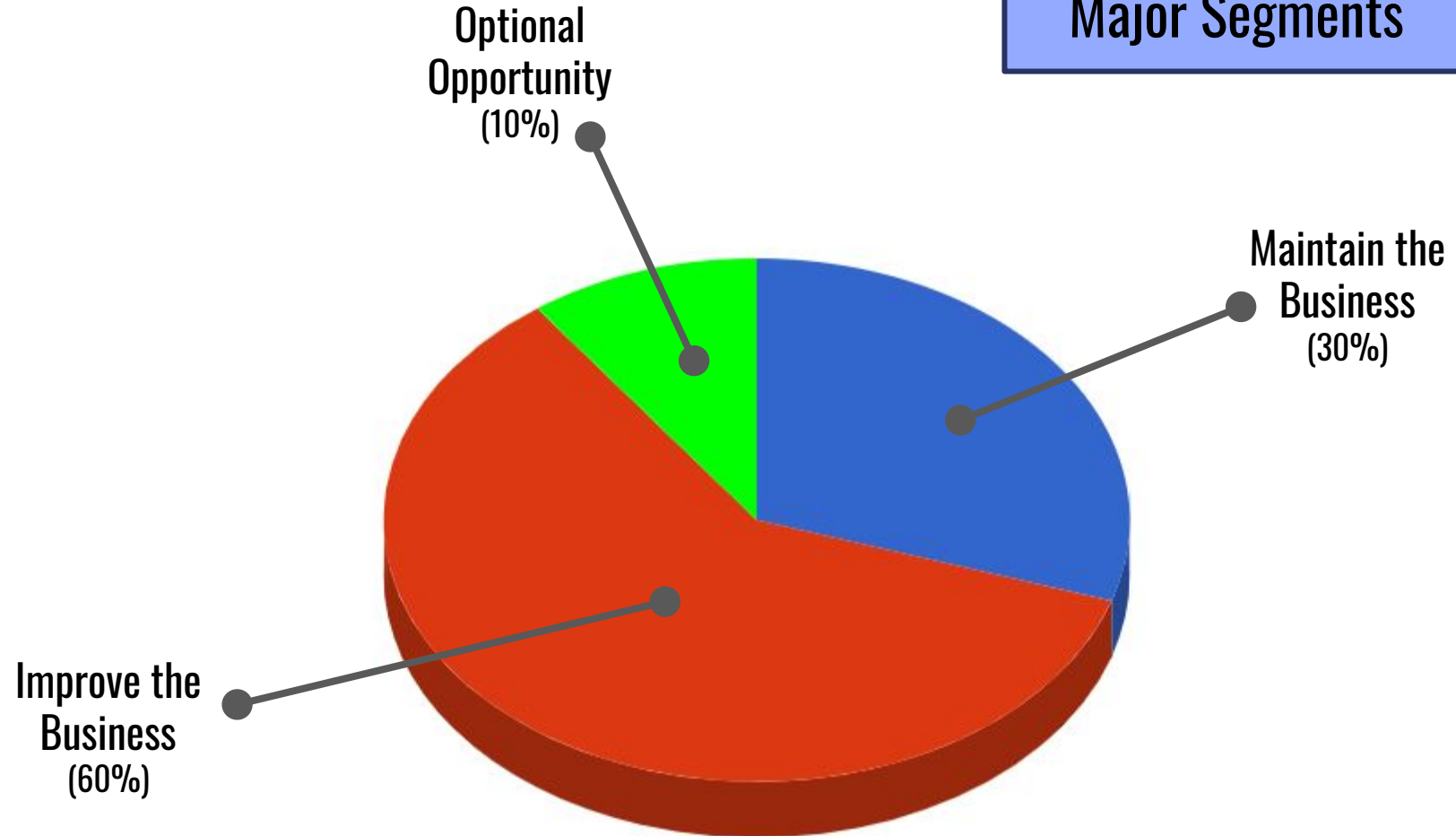
Definition: Portfolio Plan

A budget allocation & investment plan.

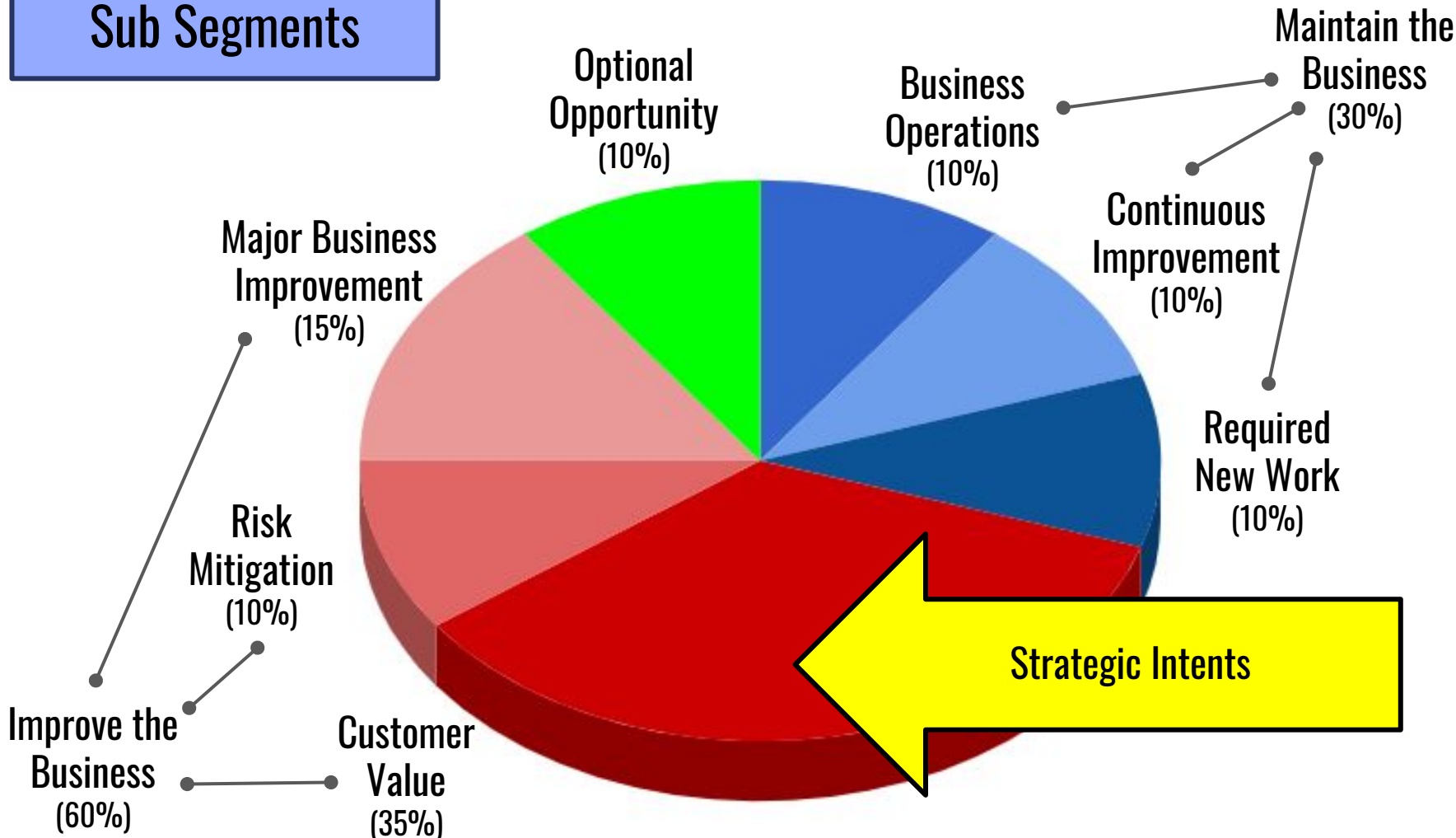
Not a hierarchical
list of projects!!!

“A spending plan for an organization’s maintaining, opportunistic, and value-add activities to achieve measurable outcomes.”

Major Segments



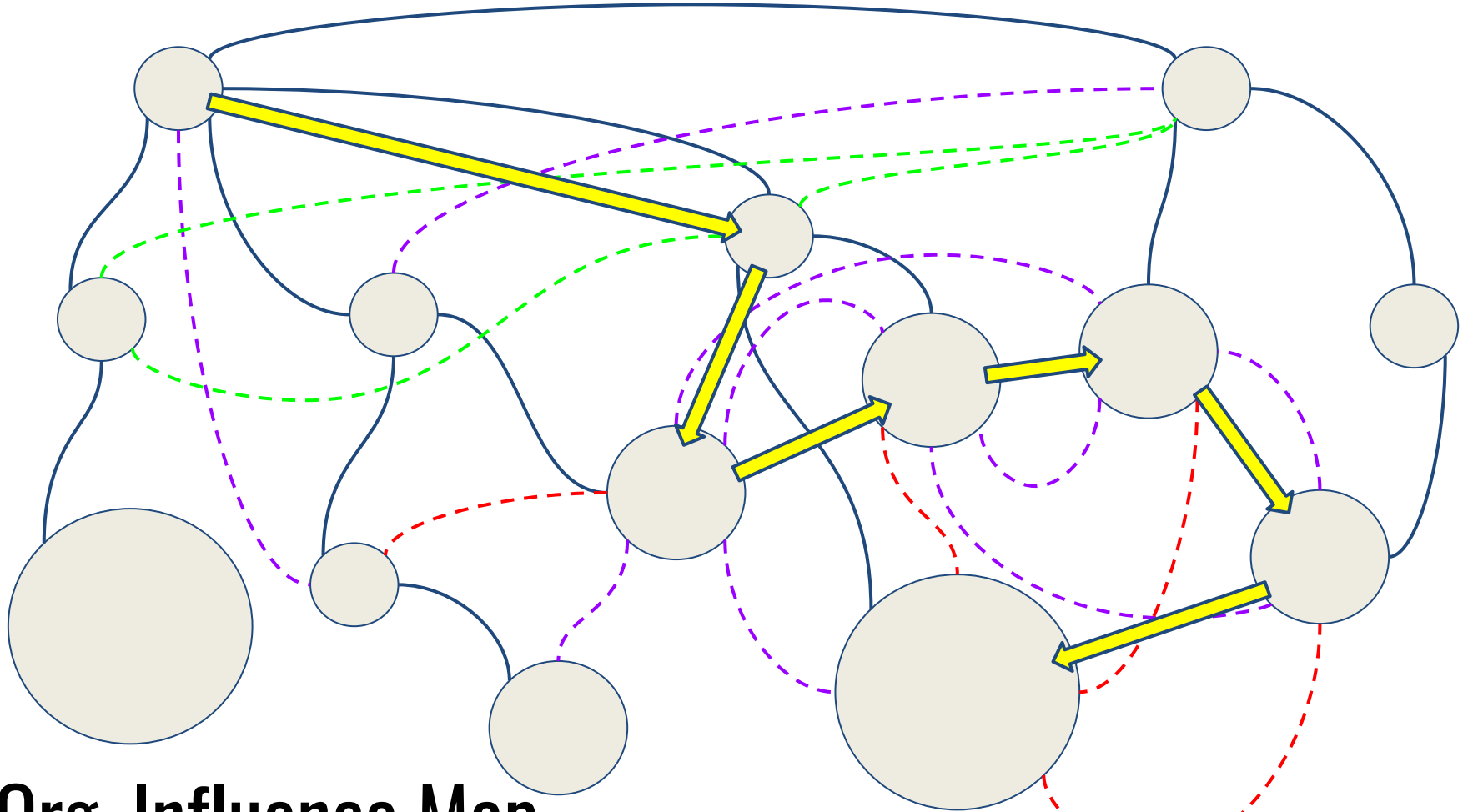
Sub Segments



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. Influence Map

Rewards-Outcomes Alignment

Stated Outcomes

Values &
Principles

Business
Objectives

Deliver
Value

Positive
Perception

Rewards

Comp &
Bennies

Raises &
Bonuses

Awards &
Recognition

Promotion

Status
Symbols

Better
Responsibilities

Autonomy

Reputation

Actual Outcomes

Burn out
Demotivation
Low quality
Too much work in process
Low teamwork
Creating problems to fix
Hero worship
Inter-dept conflict
Not doing what best for org
Low professional development
Low personal development
Hiding/keeping critical info
Staying when it's not good for anyone
Low learning
Not enough risk taking
Low experimentation
Low innovation
Low effort in general
Poor communication

How they interconnect

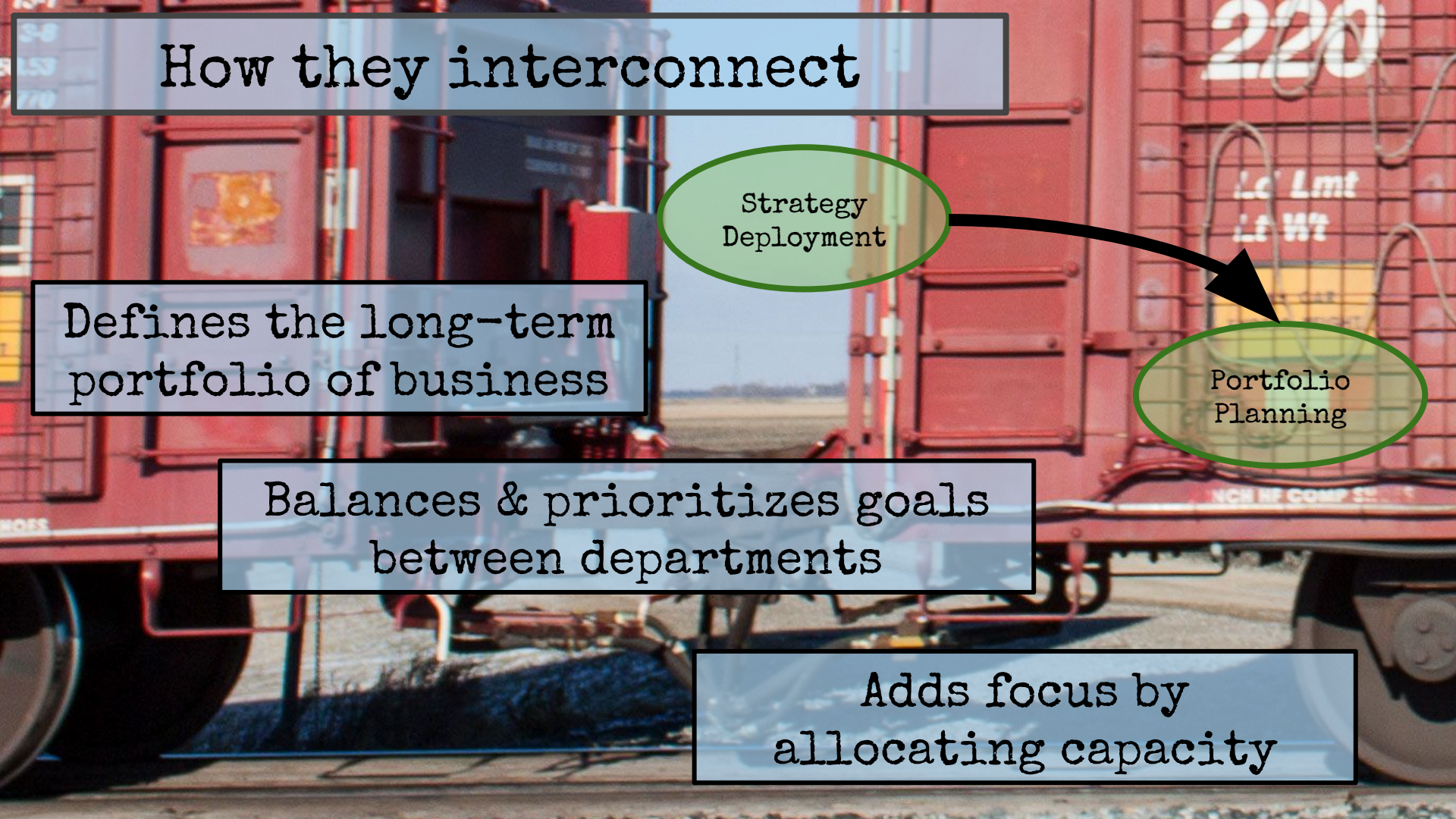
Strategy
Deployment

Defines the long-term
portfolio of business

Portfolio
Planning

Balances & prioritizes goals
between departments

Adds focus by
allocating capacity



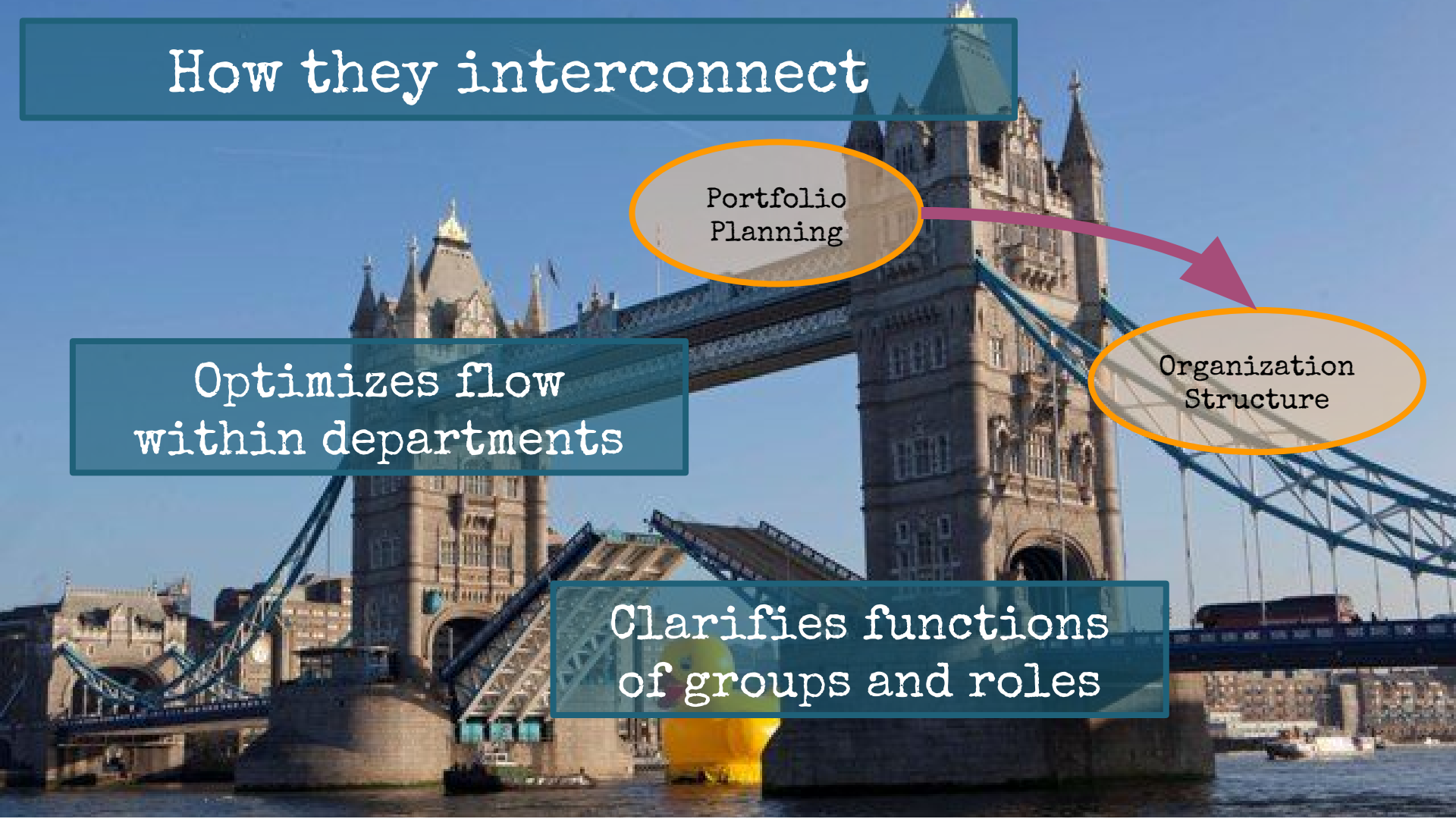
How they interconnect

Portfolio
Planning

Organization
Structure

Optimizes flow
within departments

Clarifies functions
of groups and roles



How they interconnect

Strategy
Deployment

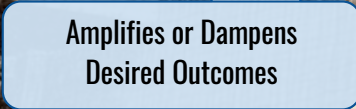
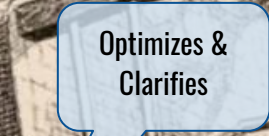
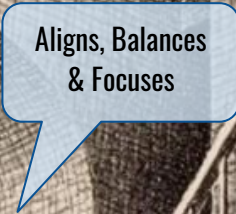
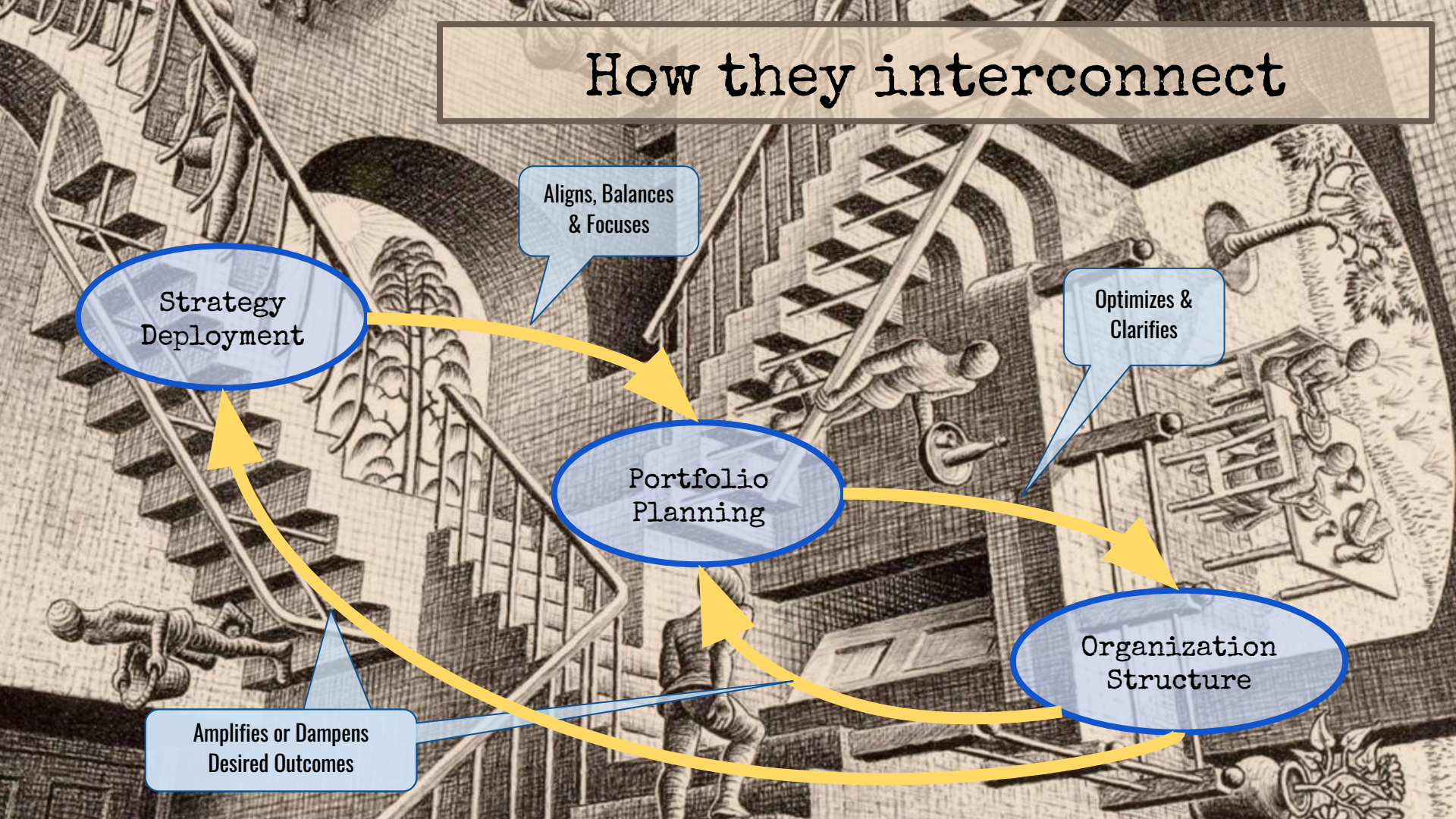
Aligns, Balances
& Focuses

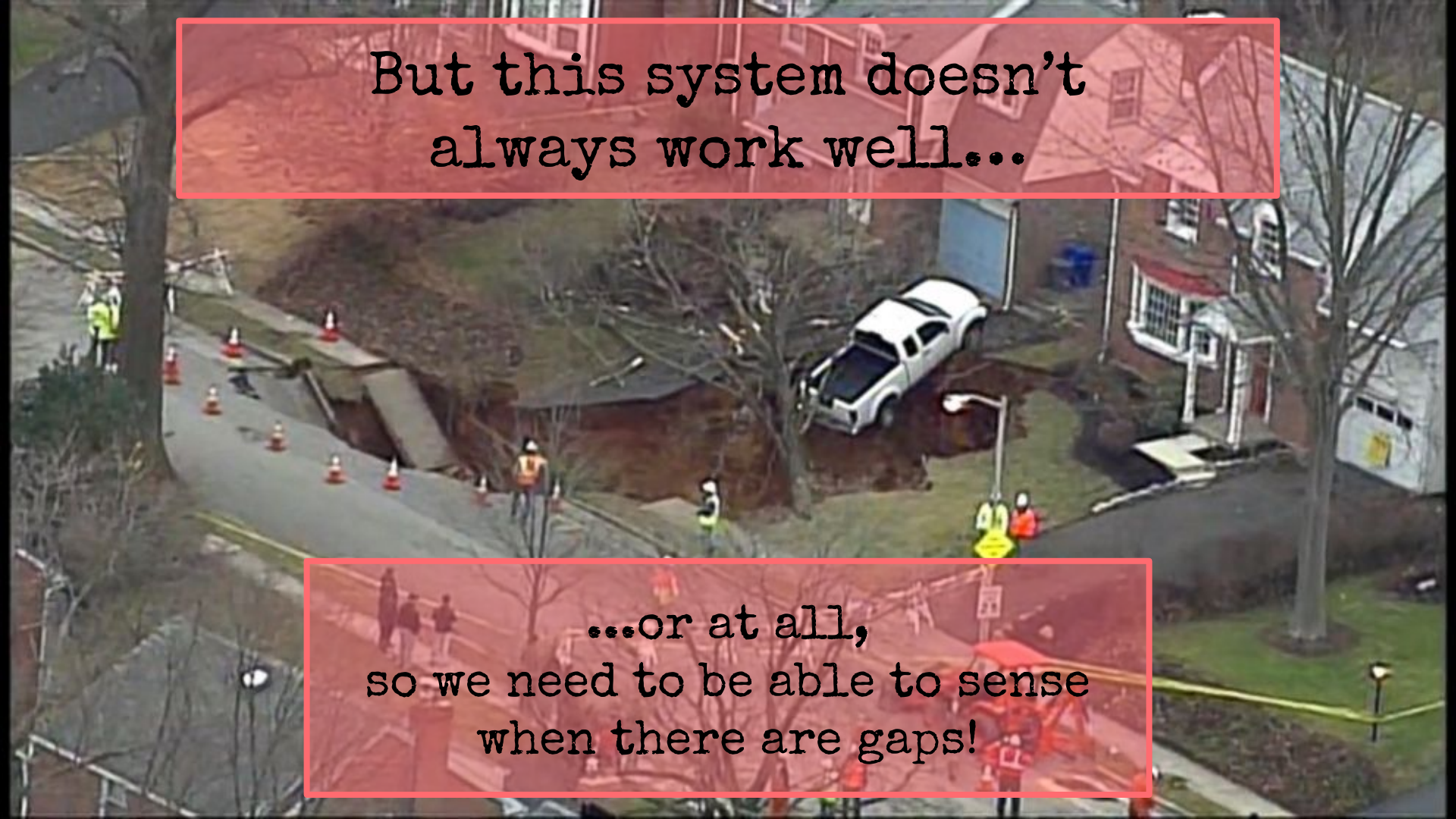
Optimizes &
Clarifies

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 tarp, is 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 path. They are using a white cane with a red handle. The background shows a concrete wall and some greenery.

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 person is wearing a white long-sleeved shirt, dark pants, and a white helmet. They are using their hands and feet to grip 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?

A background image of a park with a river, a bench, and a fence. The image is slightly blurred and has a green tint. The text is overlaid on the image in a typewriter font.

But what can you do?

Visualize work alignment

Visualize value of work

Visualize flow of value

Measure impacts on work & flow



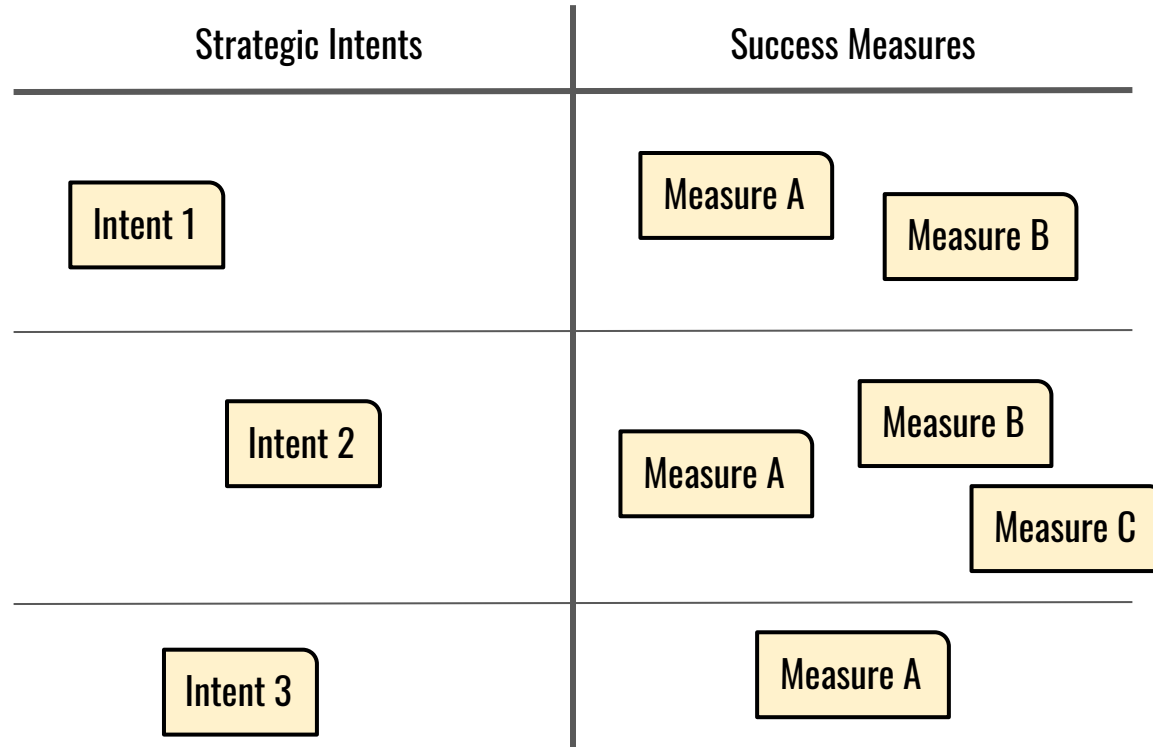
Visualize work alignment

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 blue 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:

The general problem you want to improve:

How you know it's a problem:

Top 3 groups that experience the problem:

- 1)
- 2)
- 3)

The specific 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	???	\$\$\$\$\$



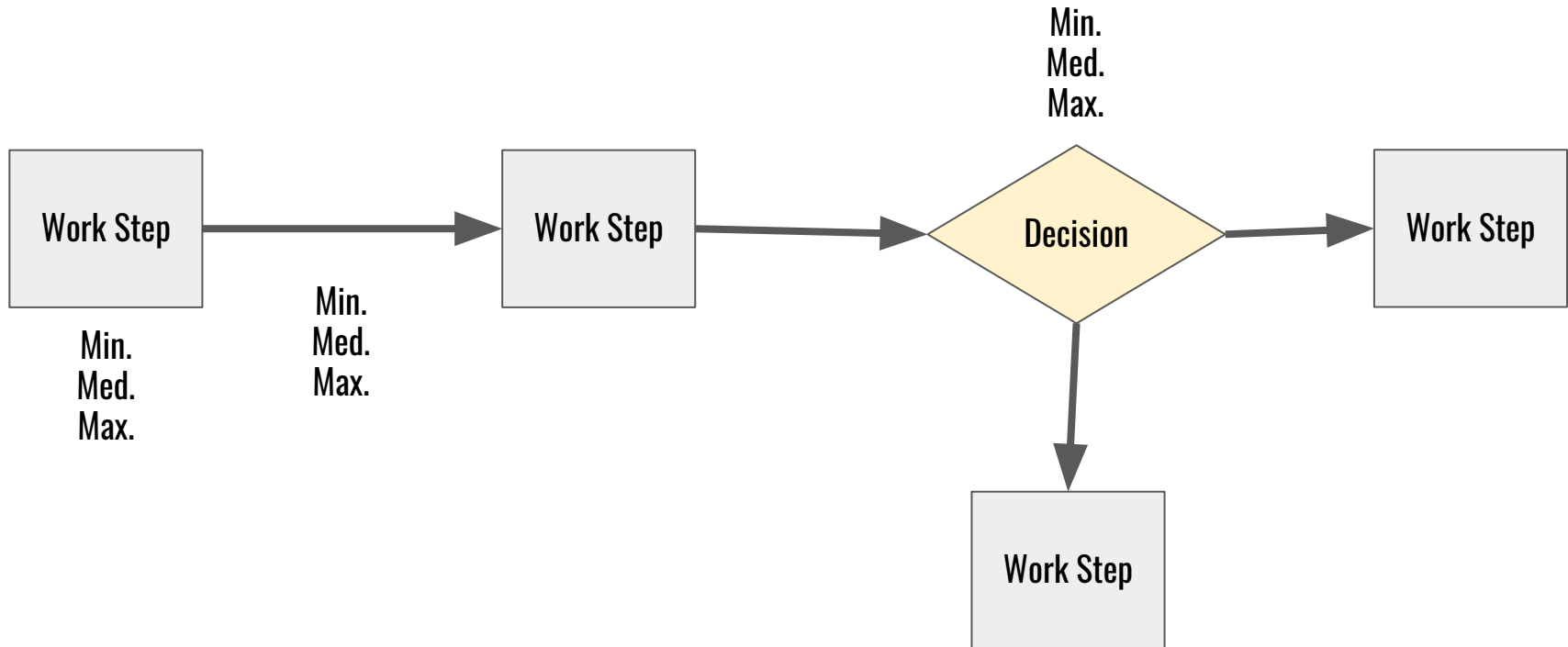
Visualize flow of value

Show wait/queues & times

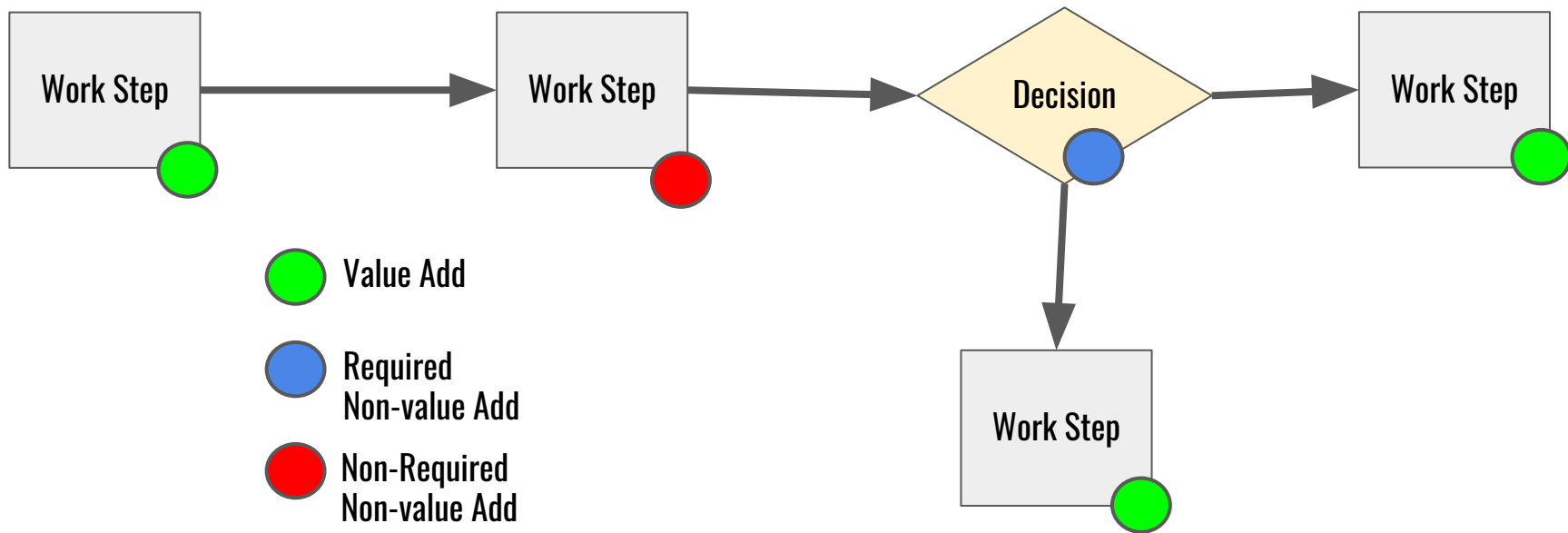
Show non-value add activities

Find “swirlies of doom”

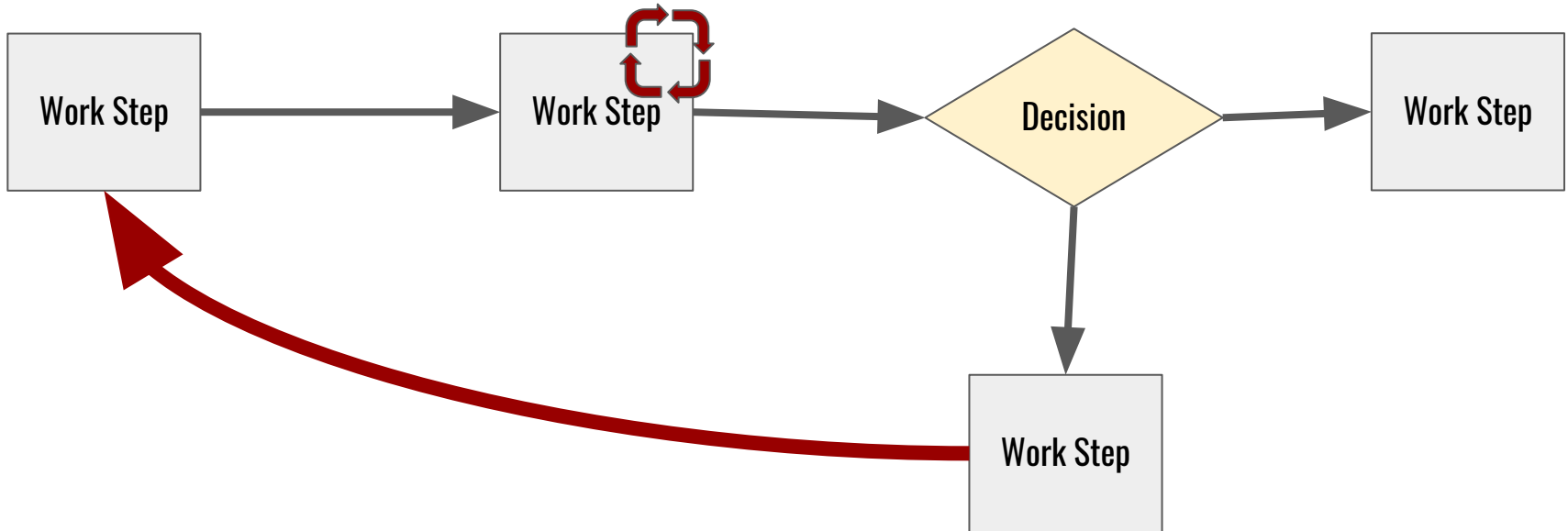
Show wait/queues & times



Show non-value add activities



Find “swirlies of doom”





Measure impacts on work & flow

Capacity Usage

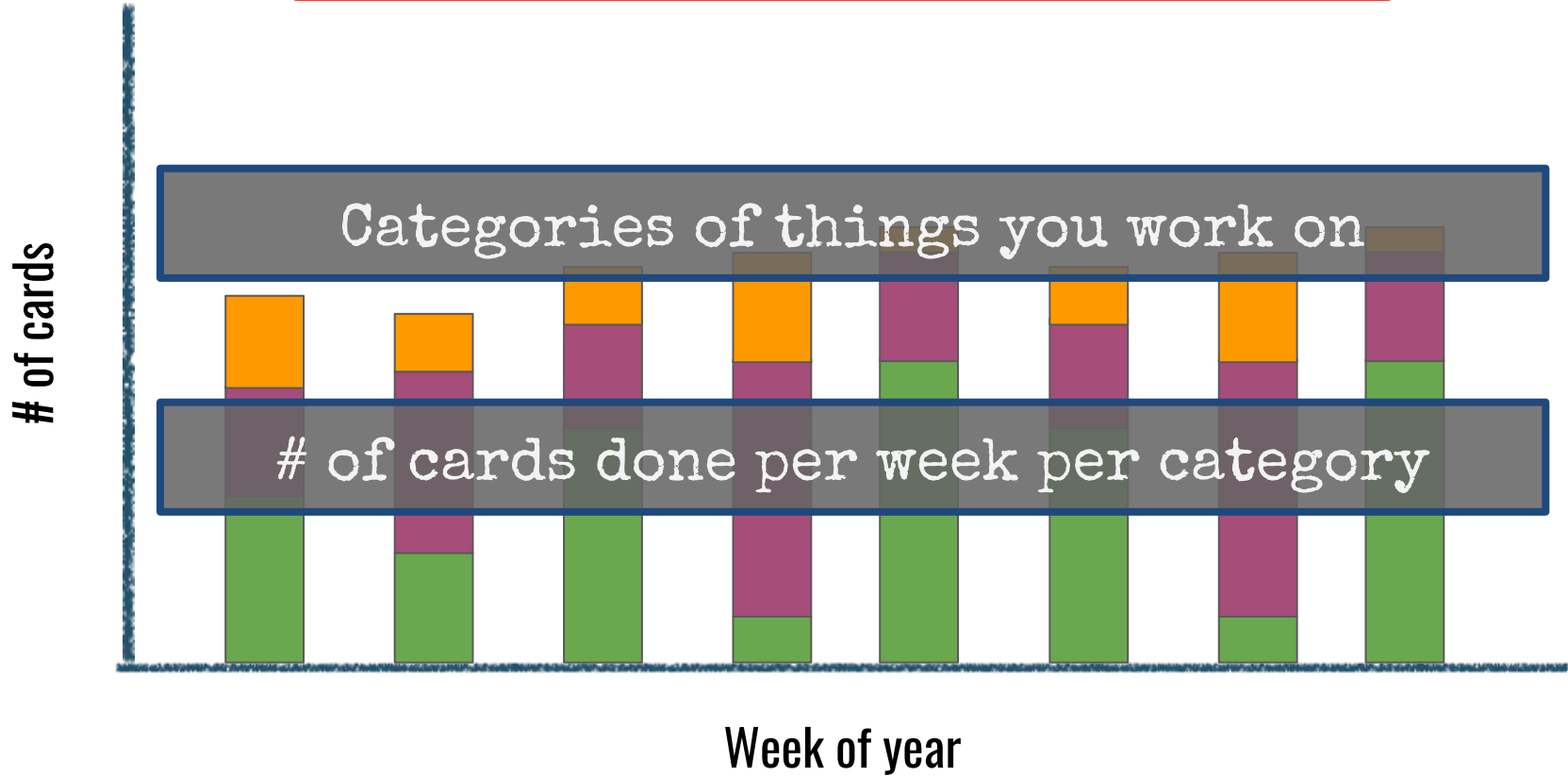
Impediment Impact

Cycle Time Frequency

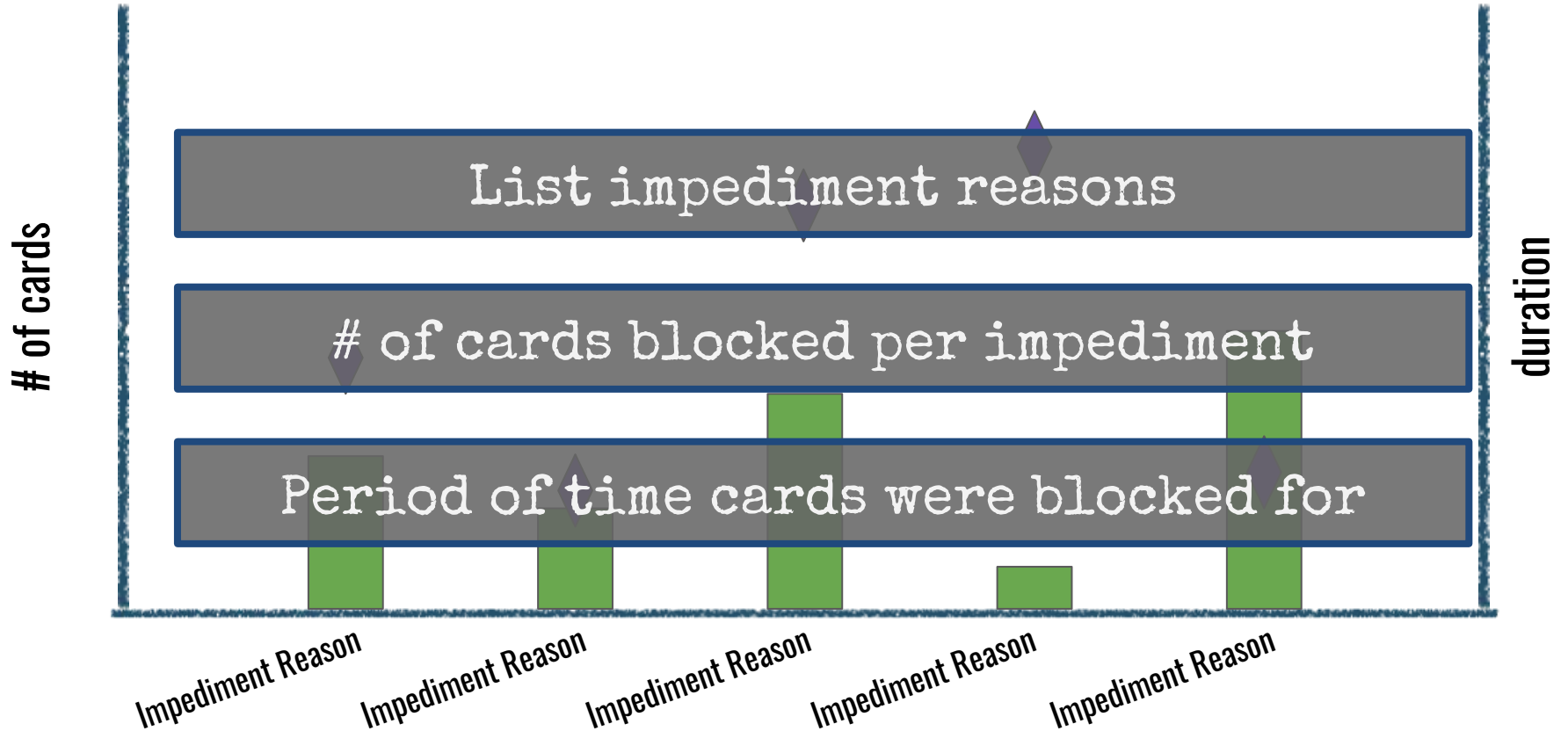
Probabilistic Forecasting

Process Cycle Efficiency

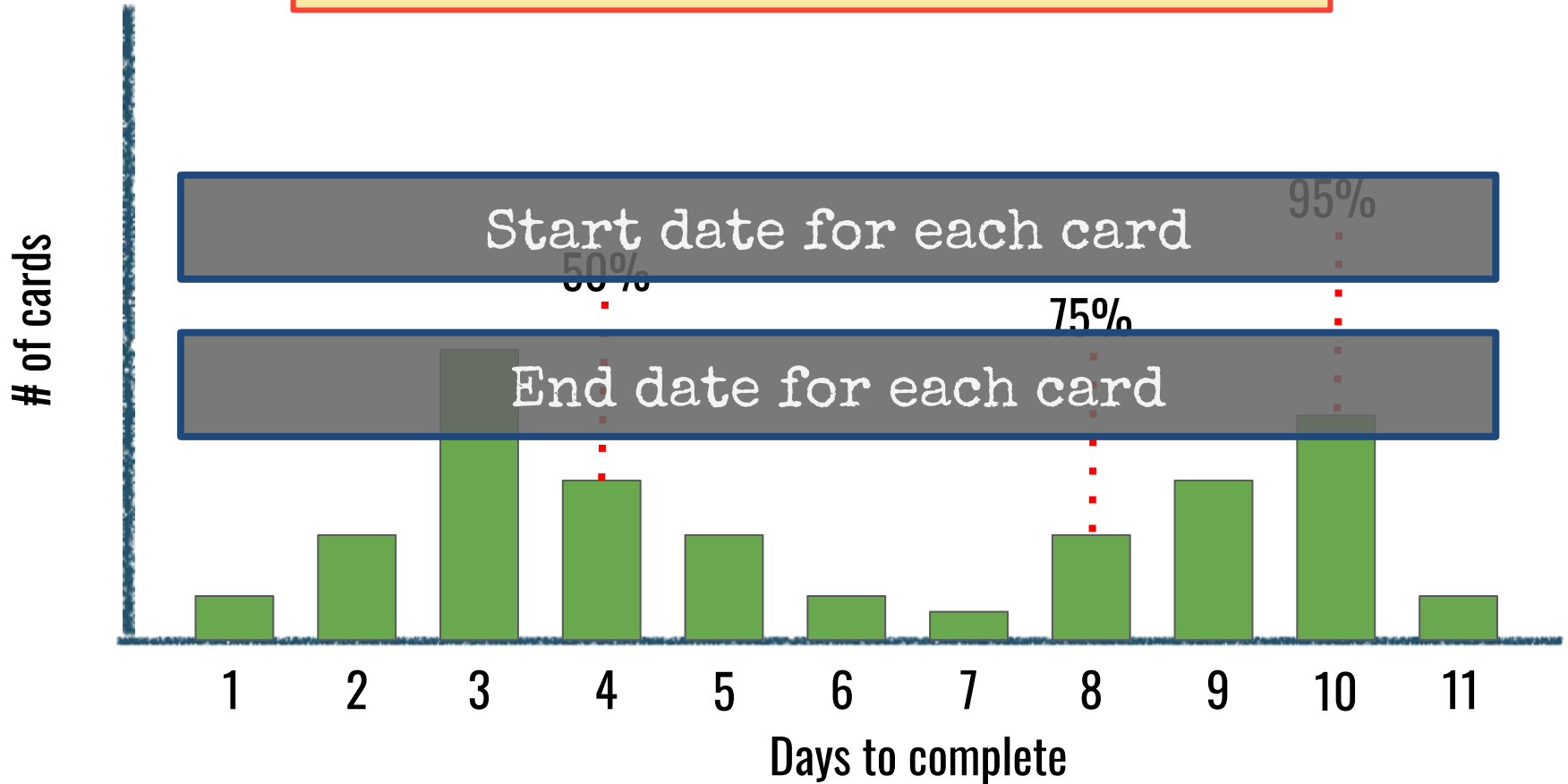
Capacity Usage



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

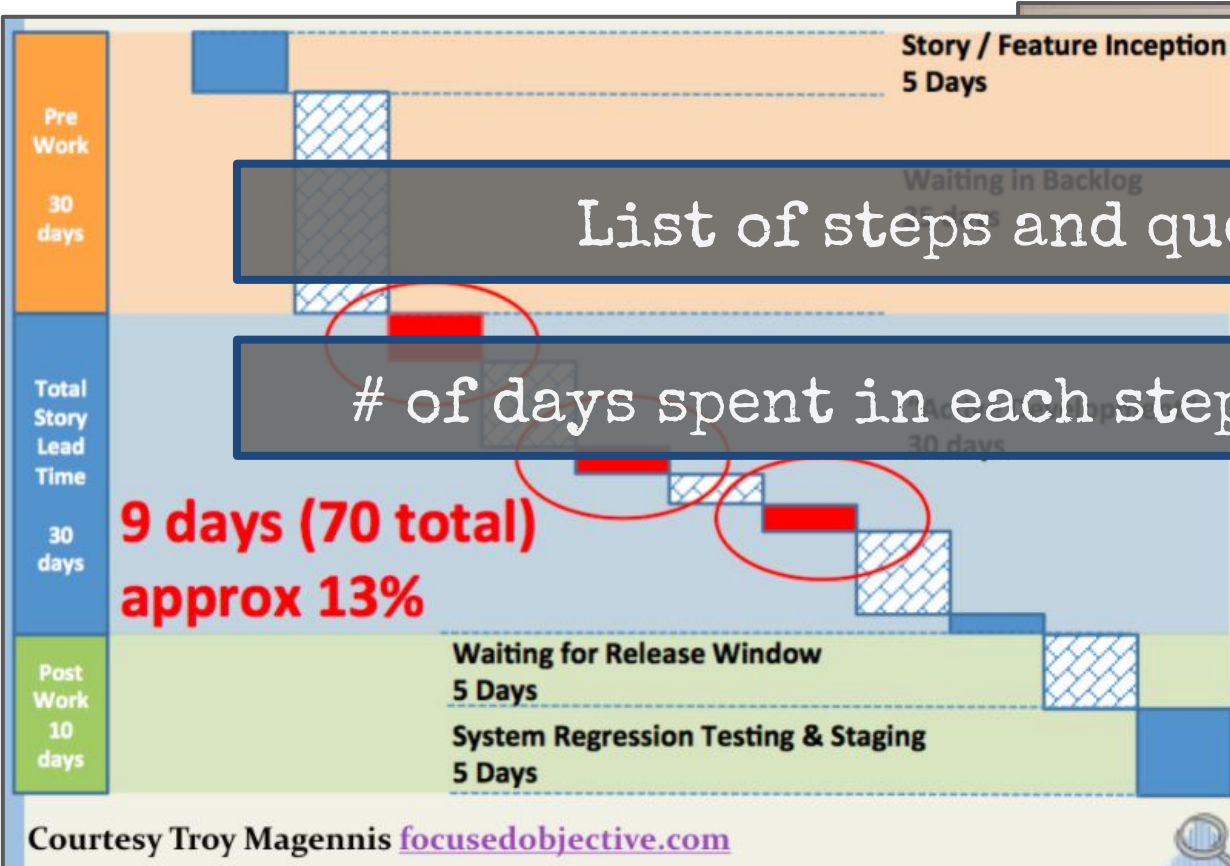
Less than coin-toss odds. But if you are game?

Use historical throughput data OR enter a low and high

Low guess

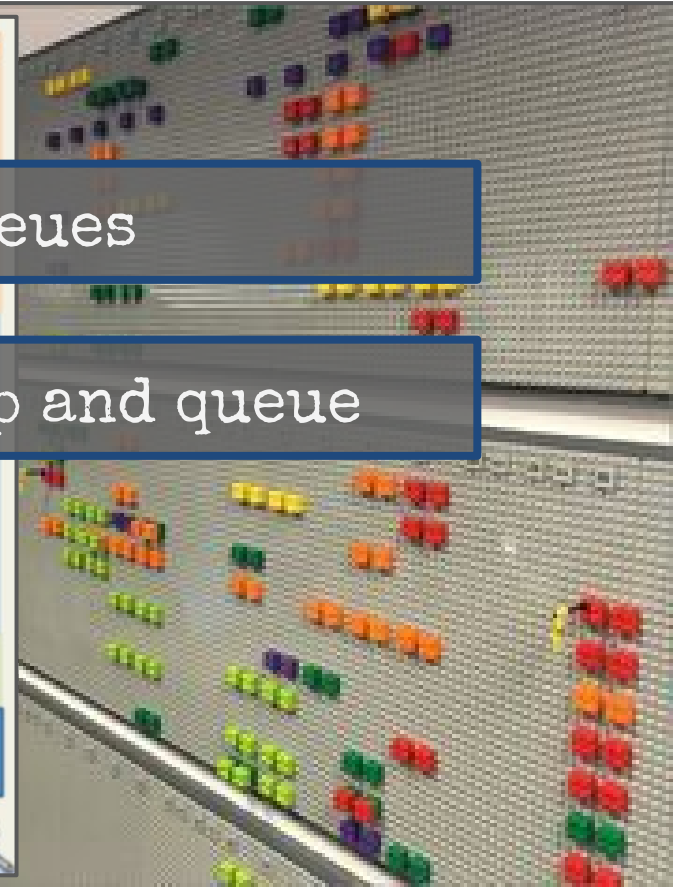
20

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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