Strategy on a Page

Introduction

Description: A Strategy on a Page is a single-page summary of an organization's current strategy. It is intended to be easy to create, share, consume, and update. Compared with traditional longer strategy documents created by committee (and then typically rarely referred to), the Strategy on a Page method is meant to encourage active communication about living, changing strategy.

Goals:

- Make it easy for teams to have a meaningful strategy discussion without a lengthy or complex document
- Make it easy to share and consume strategy across an organization
- Make it easy to update strategy as things change

Scenarios

Typical scenarios include:

- A team seeks to share its strategy with its sponsors, customers, partner teams, etc.
- A team that is lacking shared direction seeks to develop its strategy to build team agreement
- An organization seeks to improve communication and alignment between its teams by asking them to share their strategies

Method

Roles: A strategy on a page can be developed in a workshop setting by a facilitator leading a group responsible for an area they wish to describe strategy for. Once published, each strategy should have an owner; other contributors may edit the strategy based on some defined process.

Steps: In a typical initial strategy workshop, a facilitator leads discussion of and records notes on high level drivers and outcomes (defined below). The group may be able to lead initial existing or proposed initiatives toward the outcomes. This information is sufficient for a first draft, which the group can revise in further sessions or collaboratively online.

- See Jim's Strategy Into Action DIY Kit for a more detailed facilitation approach

Artifacts: A basic Strategy on a Page template includes:

- *Strategy statement:* A summary statement of the strategy, for example in the form: "To enable (who?) to (do what?), we provide (what?)." If the group has an existing brief mission statement, that could be a placeholder. It is ok to write this statement after drafting the items below and getting everyone's ideas out.
- *Drivers:* Summarize what changes or factors in the environment are driving the strategy. For example: changing business needs; changing resource constraints; growing demand; new technology opportunities; need to address technical debt; ongoing operational demands; etc.
- *Initiatives:* What will be done in response to the Drivers to achieve the Outcomes. Typically these are projects, though other work could be included. It may be helpful to categorize these items as Current, Proposed, or Future.
- *Outcomes:* Summarize what is intended to result. If possible these should be business outcomes rather than technology changes. For example, "System upgraded to V2.5" is less helpful than "Faculty sharing syllabi across the curriculum using new LMS functionality." The closer the outcome can be to a SMART goal, the better, but it is normal for teams documenting a strategy for the first time to keep outcomes more general.

The template can be expanded to include items such as:

- *Vision:* A brief description of the future that is envisioned as a result of this strategy. This helps provide an overarching "story" more general than the outcomes stated.
- *Capabilities:* If there is a capability map for the area that the strategy covers, it can be included on the strategy on a page, with highlighting on the particular capabilities that the current strategy is targeting for change.
- *Metrics:* These can be added to Outcomes if available. For example, "__% of users have adopted __ to achieve __% improvement in __". It is normal for teams documenting a
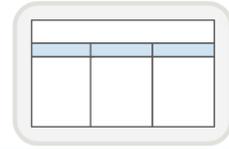
Links

- Jim Phelps, University of Washington, Strategy Into Action DIY Kit

Contributors

Want to help with this page? Please see the Method Contributor Guide.

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strategy for the first time to not have these available, and ok to add them in a later strategy cycle.

Communication

Improved communication is one of the fundamental goals of this method. Once they are drafted strategies should be kept where they are readily available to team members, peer teams, and stakeholders such as customers, sponsors, or investors. Not only should the document be available, it should be actively shared and referred to in team meetings, planning meetings, project reviews, customer advisory boards, etc.

Examples

- University of Washington Information Technology (UW-IT) Strategies web site

Related Methods

This method is at the level of strategy. A team can then choose to plan in more detail using:

- Capability Maps - Focus on what the organization needs to be able to do to execute its strategy