



# **StratifyPro's** **Think-Plan-Go®** **Methodology**

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## WELCOME AND INTRODUCTION

Welcome to the StratifyPro **Think-Plan-Go®** Methodology, your guide to mastering a process that has been tried, refined and proven for over three decades. In essence, the



StratifyPro **Think-Plan-Go®** Approach combines the strategic depth of Balanced Scorecards with the agile execution framework of OKRs to provide a comprehensive solution.

In today's fast-paced business environment, organizations face increasing pressure to achieve their strategic goals. To navigate these challenges, a structured and data-driven approach is essential. The StratifyPro **Think-Plan-Go®**

Methodology provides a proven framework for strategic planning, execution, and continuous improvement.

This guide delves into the core principles of this StratifyPro Methodology, exploring the key phases of **Think-Plan-Go®** approach. By following these phases in this approach, organizations can align teams, track progress, and make data-driven decisions to achieve sustainable growth.

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## The **THINK** Method: The Foundation of Strategic Success

The first step in our **Think-Plan-Go®** approach is the **Think Method**. This phase involves strategic thinking about the business, its strategic goals, and the path to achieving them. It's about understanding the competitive landscape, analyzing opportunities and threats, and brainstorming innovative solutions. Just as athletes train to maintain peak performance, organizations must continually flex their strategic muscles to stay ahead of the competition.

The StratifyPro THINK Method goes beyond traditional strategic planning by incorporating a holistic, data-driven, and human-centered approach. It begins with defining the company's mission, vision, and core values, providing a clear sense of purpose and direction.

### The Five Key elements of the THINK Method

The StratifyPro THINK Method follows a structured approach to strategic planning. It starts with a thorough assessment of the internal and external environment, followed by the development of SMART goals aligned with the organization's vision and mission. Finally, it incorporates scenario planning and risk assessment to prepare for future challenges and capitalize on emerging opportunities. Here is more detail:

#### 1. Comprehensive Internal & External Assessment

- **Foundational Elements:** Clearly defined vision, mission, and core values provide a shared understanding of the organization's purpose and guide decision-making.
- **People and Culture:** Organizational culture significantly impacts strategic outcomes. Assessing employee behaviors and values is crucial for understanding internal dynamics.
- **Internal Assessment:** Evaluating internal skills and capabilities, as well as understanding how organizational structure and processes impact work performance, is essential for identifying areas of strength and weakness.

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- **Viewpoint Analysis:** A comprehensive analysis requires considering multiple perspectives, such as financial performance, customer satisfaction, internal processes, and employee development.
  - **External Analysis:** Thoroughly analyzing the external environment, including market trends, competition, industry dynamics, and broader macro-economic factors, is critical for identifying opportunities and threats.
2. **Strategic Intent Formulation & Options:** This phase involves synthesizing data from assessments, generating and evaluating strategic options, and ultimately formulating a clear and actionable strategic intent.
- **Data Synthesis and Analysis:** Leverage AI and other tools to analyze data collected from various assessments, including SWOT analysis, to gain deeper insights.
  - **Generating Strategic Options:** Explore and evaluate a range of potential strategic paths based on the insights gained.
  - **Strategic Intent Formulation:** Distill findings into a cohesive, directional strategic intent statement that balances aspirations with organizational capabilities and market realities.
  - **Defining Success:** Set clear, measurable goals that define what successful achievement of the strategic intent looks like.
3. **Develop and Refine a Portfolio of Strategies:** This phase focuses on translating the organization's strategic intent into a set of actionable strategies. Key activities include:
- **Strategy Formulation:** Categorizing potential strategies into themes (e.g., growth, innovation, market expansion) and identifying strategies that align with the overarching strategic intent and the current operating environment.
  - **Strategic Choice:** Evaluating and selecting the most promising strategies based on factors such as resource availability, market conditions, competitive advantage, and risk assessment.

- **Goal Setting and KPI Development:** Setting clear, measurable, achievable, relevant, and time-bound (SMART) goals for each chosen strategy and defining key performance indicators (KPIs) to track progress and measure success.
- **Identifying Required Changes:** Assessing current capabilities and identifying necessary changes to business processes, technology, and organizational structure to support the successful implementation of chosen strategies.
- **Decision-Making Frameworks:** Utilizing decision matrices or scoring models to evaluate and select the most promising strategies, considering factors such as resource availability, market conditions, competitive advantage, and risk assessment.

#### 4. Strategic Goal Setting:

- **Goal Setting and KPI Development:** Setting clear, measurable, achievable, relevant, and time-bound (SMART) goals for each chosen strategy and defining key performance indicators (KPIs) to track progress and measure success.
- **Prioritization:** Determining the most critical strategic goals and allocating resources accordingly.

#### 5. Scenario Planning and Risk Assessment:

- **Identifying Potential Scenarios:** Considering various future possibilities, including best-case and worst-case scenarios.
- **Developing Contingency Plans:** Creating strategies to address potential challenges and capitalize on emerging opportunities.
- **Risk Assessment:** Identifying potential risks that could impact the organization's goals, assessing their likelihood and severity, and developing risk mitigation strategies.

## The Think Method: Fostering a Culture of Strategic Thinking

A culture of strategic thinking, fostered by the Think Method, is essential for long-term success. The Think Method encourages the following:

- **Continuous Learning:** Encouraging continuous learning and adaptation by staying informed about industry trends, embracing new technologies, and regularly reviewing and refining strategic plans.
- **Human-Centered Approach:** Considering the human element, including organizational culture, employee engagement, and leadership styles, throughout the strategic planning process.
- **Collaboration, Communication & Alignment:** Fostering a culture of collaboration and open communication to ensure that all stakeholders are aligned with the strategic direction. By aligning individual contributions with broader organizational strategic goals, a Think Method empowers your team to drive future growth.
- **Regular brainstorming sessions:** Fostering regular brainstorming sessions establishes creativity and innovation, while continuous questioning encourages a growth mindset.

By encouraging a culture of strategic thinking you can position your organization for growth and adaptability in a rapidly changing business landscape.

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## The **PLAN** Method: Transforming Strategic Ideas into Actions

The **Plan Method** is where strategic ideas are transformed into tactical and actionable plans - Strategic Plans. This involves breaking down strategic goals into smaller, manageable goals, tasks, assigning responsibilities, and setting clear timelines. By aligning teams and resources, you can ensure that everyone is working towards a common strategic goal. Regular annual and quarterly planning sessions help maintain focus and adapt to changing circumstances.

The StratifyPro PLAN Method goes beyond traditional project management by integrating key learnings from the THINK phase and leveraging a data-driven, human-centered approach.

### The Six Key elements of the PLAN Method

In the PLAN Method, transform complex strategic goals (discovered in the THINK phase) into actionable plans - and this requires a systematic approach. By breaking down overarching objectives into smaller, manageable tasks, organizations can ensure clarity and focus. Prioritizing tasks based on their impact on strategic objectives helps allocate resources effectively. Visualizing project timelines using Gantt charts provides a clear roadmap for execution. Additionally, thorough resource allocation planning and risk mitigation strategies are crucial for ensuring project success.

#### 1. **Goal Decomposition, Alignment and Prioritization:**

- **Break Down Strategic Goals:** Dissect large, complex goals into smaller, manageable tasks and objectives, ensuring alignment with the strategic intent defined in the THINK phase.
- **Prioritize Tasks:** Focus on high-impact activities that directly contribute to the achievement of key results (KRs) and ultimately, strategic objectives.



- **Alignment:** Ensuring alignment of strategies with operations and across various strategic goals
- **Viewpoint Alignment:** Ensure that the implementation plan considers the impact of each action on all key "Viewpoints" (e.g., Financial, Customer, Internal Processes, Learning & Growth).
- **Visualize Progress:** Use tools like Gantt charts to visualize the project timeline.

## 2. Resource Allocation and Planning:

- **Allocate & Align Resources:** Assign and align specific goals and tasks to the right people and resources, considering their skills, experience, and availability.
- **Set Deadlines:** Establish clear and realistic deadlines for each task and milestone, considering potential dependencies and resource constraints.
- **Create a Detailed Timeline:** Develop a visual representation of the project timeline using tools like Gantt charts.

## 3. Annual & Quarterly Strategy Reviews and Adjustments:

- **Annual Planning:** Conduct annual planning sessions to set long-term goals and objectives.
- **Quarterly Reviews:** Assess progress, identify bottlenecks, and make necessary adjustments.
- **Weekly Check-ins:** Monitor daily tasks and address any issues promptly.

## 4. Risk Management and Mitigation:

- **Identify Potential Risks:** Proactively identify and assess potential risks that could impact the successful execution of the plan.
- **Develop Mitigation Strategies:** Develop and implement strategies to mitigate or minimize the impact of potential risks.
- **Utilize StratifyPro's risk management features:** Leverage the platform's capabilities to track and monitor identified risks and adjust plans accordingly.

## 5. Continuous Monitoring and Adaptation:

- **Regular Status Reviews:** Conduct regular reviews (e.g., weekly, monthly) to track progress, identify any roadblocks, and address any issues that may arise.
- **Data-Driven Decision Making:** Utilize data and analytics from StratifyPro to monitor key performance indicators (KPIs), identify areas for improvement, and make informed adjustments to the plan.
- **Agile Principles:** Embrace Agile principles, such as iterative development, flexibility, and continuous feedback, to ensure that the plan remains responsive to changing circumstances.

## 6. Communication and Collaboration:

- **Effective Communication:** Ensure clear and consistent communication of the plan and progress updates across all levels of the organization.
- **Collaboration and Teamwork:** Foster a collaborative environment where teams can work together effectively to achieve shared goals.
- **Leverage StratifyPro's communication and collaboration features:** Utilize the platform's communication tools to facilitate discussions, share updates, and track progress within the team.

## The Plan Method: More than just a Project Plan

The StratifyPro PLAN Method goes beyond traditional project management by integrating seamlessly with the outputs of the "THINK" phase. By leveraging StratifyPro's capabilities, it ensures that strategic plans are not just documents, but actionable roadmaps. This approach emphasizes:

- **Data-driven decision making:** Utilizing data and analytics to monitor progress and make informed adjustments.
- **Continuous improvement:** Regularly reviewing and refining plans based on feedback and changing circumstances.
- **Human-centered approach:** Considering the impact of plans on people, culture, and organizational dynamics.

- **Alignment with "Viewpoints":** Ensuring that plans address the organization's goals across all key areas, such as financial performance, customer satisfaction, and employee engagement. This integrated approach, coupled with regular planning sessions and a focus on continuous improvement, enables organizations to effectively translate strategic plans into tangible results and achieve their desired outcomes.

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## The GO Method: Turning Strategy into Reality

The final phase, the Go method, is where the rubber meets the road. This is where strategic plans are brought to life through action. Regular weekly meetings, informed by dashboards and alignment maps, ensure that teams stay focused, accountable, and on track. By continuously monitoring progress, analyzing data, and making adjustments, organizations can maximize their chances of achieving their strategic goals.

### The Four Key elements of the GO Method

Effective strategy execution in our GO Method requires a relentless focus on implementation. Regular reviews and adjustments are crucial to ensure that strategies are translated into actionable plans and delivered on time. Daily stand-ups and weekly progress reviews help identify potential roadblocks, address issues promptly, and keep teams aligned. By tracking key performance indicators (KPIs) and analyzing data, organizations can measure progress, identify areas for improvement, and make informed decisions. This iterative approach to strategy execution ensures that plans remain relevant and adaptable to changing circumstances.

#### 1. Daily Focus and Accountability:

- a. **Daily Huddles:** Conduct brief “Agile” daily meetings to align teams, prioritize tasks, and address any roadblocks.
- b. **Individual Accountability:** Assign clear responsibilities and track individual performance.
- c. **Regular Check-ins:** Conduct regular check-ins with team members to provide support and guidance.

#### 2. Weekly Reviews and Adjustments:

- a. **Progress Reviews:** Assess progress towards weekly and monthly goals.
- b. **Risk Assessment:** Identify potential risks and develop mitigation strategies.

- c. **Course Correction:** Make necessary adjustments to the plan to stay on track.
  - d. **Learning and Improvement:** Identify lessons learned and incorporate them into future plans.
3. **Continuous Learning and Adaptation:**
- a. **Data-Driven Decision Making:** Utilize StratifyPro's data and analytics capabilities to monitor key performance indicators (KPIs), identify trends, and make informed decisions.
  - b. **Viewpoint Alignment:** Regularly review progress and make adjustments to ensure that actions are aligned with the organization's goals across all key "Viewpoints" (e.g., Financial, Customer, Internal Processes, Learning & Growth).
  - c. **Continuous Improvement:** Foster a culture of continuous learning by analyzing results, identifying areas for improvement, and incorporating feedback into future plans.
4. **Collaboration and Communication:**
- a. **Communication and Collaboration:** Utilize the communication tools to facilitate seamless teamwork, share updates, and address roadblocks.
  - b. **Foster a Culture of Transparency:** Encourage open communication and information sharing across all levels of the organization.

## GO Method: Bringing Strategic Plans to Life!

The Go phase is the critical juncture where strategic plans are brought to life. Successful execution hinges on clear deadlines, prioritized tasks, and unwavering focus. More than individual motivation, effective teamwork relies on strong collaboration, a willingness to learn from setbacks, and a shared commitment to achieving goals. By establishing a structured approach, fostering a culture of continuous improvement, and ensuring consistent execution, teams can work efficiently and effectively to translate strategic plans into tangible results.

### Key Deliverables:

- **Achieving Strategic Objectives:** Successfully execute strategic initiatives and achieve the desired outcomes defined in the "THINK" phase.
- **Continuous Improvement:** Continuously refine and improve strategies based on data, feedback, and changing circumstances.
- **Organizational Learning:** Leverage learnings from the execution phase to inform future strategic planning decisions.

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## By implementing effective execution strategies, organizations can ...

- **Maximize Productivity:** Optimize resource allocation and minimize wasted effort.
- **Enhance Collaboration:** Foster teamwork and knowledge sharing.
- **Drive Innovation:** Encourage creativity and experimentation.
- **Achieve Strategic Goals:** Deliver results and create long-term value.

## The Benefits of a Structured Approach

By implementing the **Think, Plan, Go®** framework, your organization can experience numerous benefits:

- **Improved Alignment:** Ensure everyone is working towards the same goals.
- **Increased Accountability:** Hold teams accountable for their actions and results.
- **Enhanced Agility:** Adapt quickly to changing market conditions.
- **Boosted Employee Engagement:** Foster a culture of collaboration and motivation.
- **Accelerated Innovation:** Encourage creativity and innovation.
- **Improved Decision-Making:** Make informed decisions based on data and insights.

The Think, Plan, Go® methodology provides a structured approach to strategic planning and execution. By encouraging reflection, prioritizing tasks, and fostering accountability, this framework helps teams stay organized, efficient, and focused on achieving their goals.

## Implementing the Think-Plan-Go® Methodology

The Think-Plan-Go® methodology is a powerful framework for guiding organizations from strategic vision to tangible outcomes. It emphasizes a structured and data-driven

approach, ensuring that strategic initiatives are not just planned, but effectively executed and continuously improved. It's embodied in the StratifyPro platform. Here is a summary of the phases of the methodology.

## Key Phases of the Think-Plan-Go Methodology:

- **Think:** This phase focuses on strategic thinking and foundational planning. It involves:
  - **Defining the "Why":** Articulating the organization's mission, vision, and core values.
  - **Conducting Comprehensive Assessments:** Analyzing internal and external factors, including market trends, competitive landscape, and customer needs, through the lens of multiple "Viewpoints" (e.g., Financial, Customer, Internal Processes, Learning & Growth).
  - **Leveraging AI:** Utilizing AI and data analytics to gain deeper insights and identify strategic opportunities.
  - **Formulating Strategic Intent:** Defining a clear and actionable strategic direction that aligns with the organization's mission and values.
  - **Setting Strategic Goals:** Developing SMART goals that are specific, measurable, achievable, relevant, and time-bound.
- **Plan:** This phase translates strategic goals into actionable plans. It involves:
  - **Breaking Down Goals:** Decomposing strategic goals into smaller, manageable tasks.
  - **Resource Allocation:** Assigning responsibilities, allocating resources, and setting clear deadlines.
  - **Risk Management:** Identifying and mitigating potential risks.
  - **Creating Roadmaps:** Developing detailed project timelines and visualizing progress using tools like Gantt charts within the StratifyPro platform.
  - **Ensuring Alignment:** Aligning plans with the organization's mission, vision, core values, and the "Viewpoints" defined in the "Think" phase.



- **Go:** This phase focuses on execution, monitoring, and continuous improvement. It involves:
  - **Daily Execution:** Conducting daily stand-ups, tracking progress, and addressing roadblocks using StratifyPro's tools.
  - **Regular Reviews:** Conducting regular reviews to assess progress, identify areas for improvement, and make necessary adjustments to the plan.
  - **Data-Driven Decision Making:** Utilizing StratifyPro's data and analytics capabilities to monitor key performance indicators (KPIs), identify trends, and make informed decisions.
  - **Continuous Learning and Adaptation:** Fostering a culture of continuous learning by analyzing results, incorporating feedback, and adapting to changing circumstances.

By following the Think-Plan-Go methodology and leveraging the power of the StratifyPro platform, organizations can effectively translate their strategic vision into tangible results, achieve their desired outcomes, and drive sustainable growth.

## StratifyPro: Your Partner in Strategic Execution

StratifyPro empowers teams to execute their strategies with precision. Our powerful software embodies the Think, Plan, Go® methodology, ensuring alignment, accountability, measurements, and progress tracking - all focused on achieving outcomes.

StratifyPro's AI-powered platform offers a comprehensive solution for strategic planning and execution. With features like automated plan, goal, KPI and action setting, real-time progress tracking, alignment mapping and seamless integration, it empowers teams to make data-driven decisions and achieve their strategic objectives.

## Key Takeaways of the Think-Plan-Go® Methodology

The Think, Plan, Go® Methodology provides a comprehensive framework for driving business growth. By aligning teams, tracking progress, and adapting to change, organizations can achieve their strategic goals.

In today's complex business landscape, organizations need a reliable system to drive execution and achieve sustainable growth. The Think, Plan, Go® Methodology, powered by StratifyPro, provides a proven solution. By aligning teams, tracking progress, and making data-driven decisions, you can navigate challenges and achieve breakthrough results.