

16 OCTOBER 2024

STRATEGY
BOOTCAMP
2024

Achieving Balance & Stability in Strategy Execution



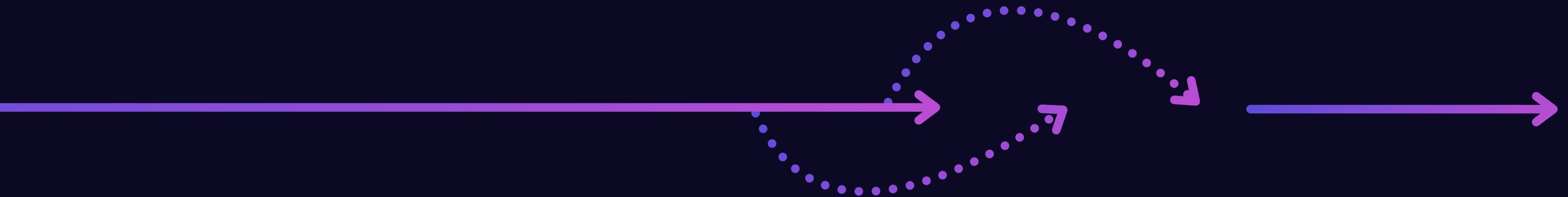


Devina Patel



Miriam Lesa

THE REAL CHALLENGE ISN'T CREATING THE STRATEGY



**IT'S KEEPING IT ALIVE, ADAPTABLE,
AND MOVING FORWARD IN THE
FACE OF UNCERTAINTY**

What You Can Expect Today



● De-Mystify Stability vs. Balance

● Real World Case Study

● Major Challenges

● Practical Tools

● How Cascade Can Help

Balance vs Stability in Strategy Execution

Balance is about **flexibility**
and **adaptability**

Balance

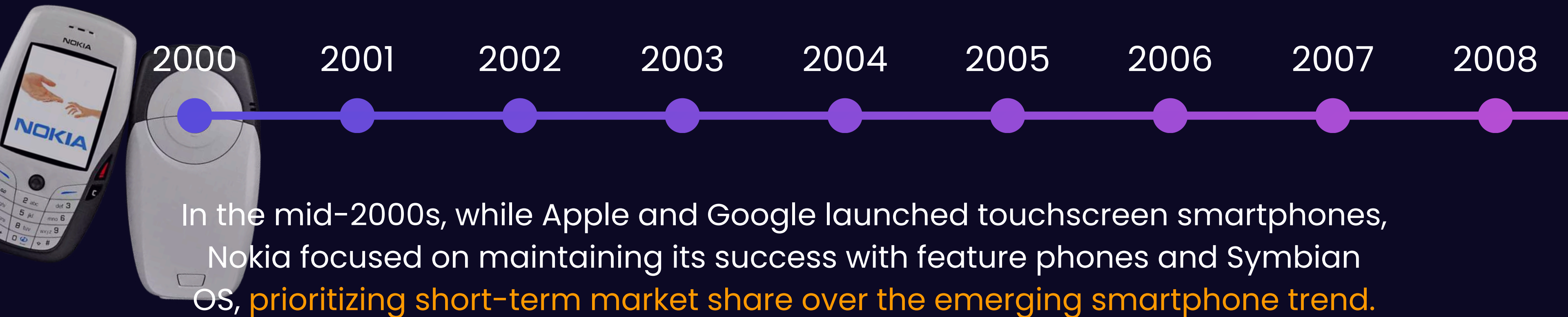
Stability

Stability is about **predictability**
and **consistency**

LET'S GET INTO A CASE STUDY

NOKIA

STRUGGLE TO BALANCE SHORT-TERM GAINS WITH LONG-TERM STRATEGY



Short Term Focus

Nokia focused heavily on **maintaining and maximizing its existing dominance** in the feature phone market. The leadership continued to **prioritize short-term profits** by enhancing the Symbian OS and selling more feature phones, even as the market began to shift toward smartphones.

Long Term Neglect

The company recognized the potential of smartphones and even had the internal capability to innovate (it had early prototypes of smartphones with touchscreens), but leadership was **unwilling to take the risk of disrupting its profitable feature phone business**. This led to delays in developing a competitive smartphone offering.



SO WHAT ARE THE
KEY CHALLENGES IN THIS
BALANCING ACT?

A decorative graphic consisting of a thick purple line that slopes upwards from left to right. A small purple circle is positioned on the line, and a larger purple circle is partially visible on the right edge of the frame.

Constant Pressure for
Immediate Results

Resource Allocation
Conflicts

Organizational Silos
and Misalignment

Maintaining focus on
Long-Term Vision

Cultural Resistance

Risk Management

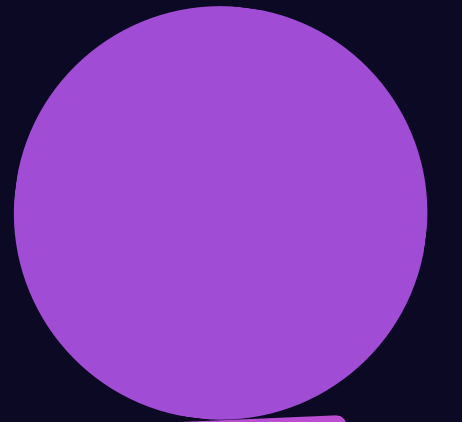
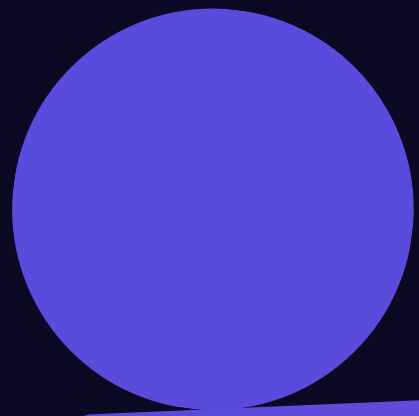


LET'S TAKE A LOOK
AT SOME
PRACTICAL TOOLS

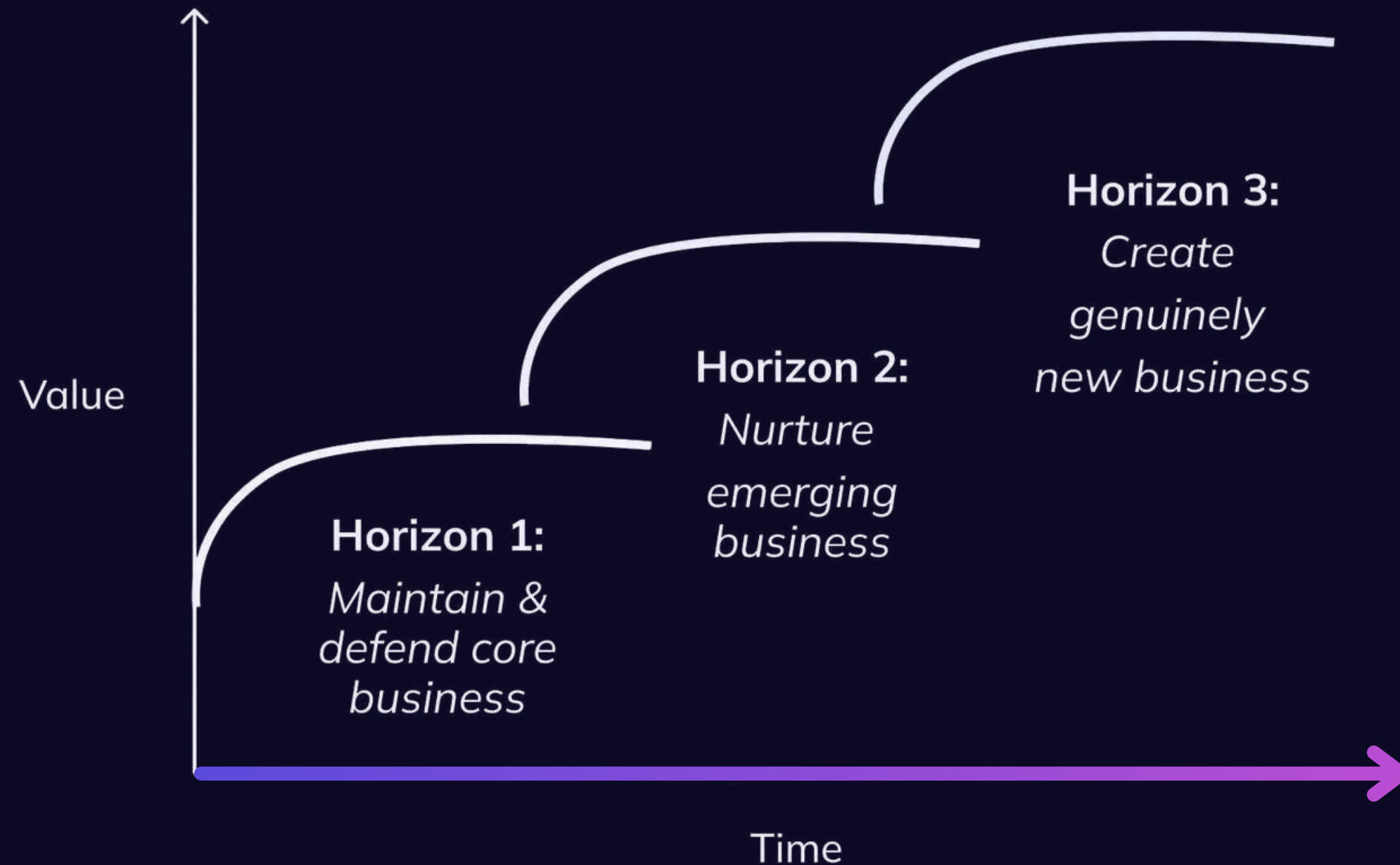
TO HELP GET INTO
THE RIGHT
MINDSET FOR
BALANCE AND
STABILITY

Common tools and frameworks to navigate the balancing act

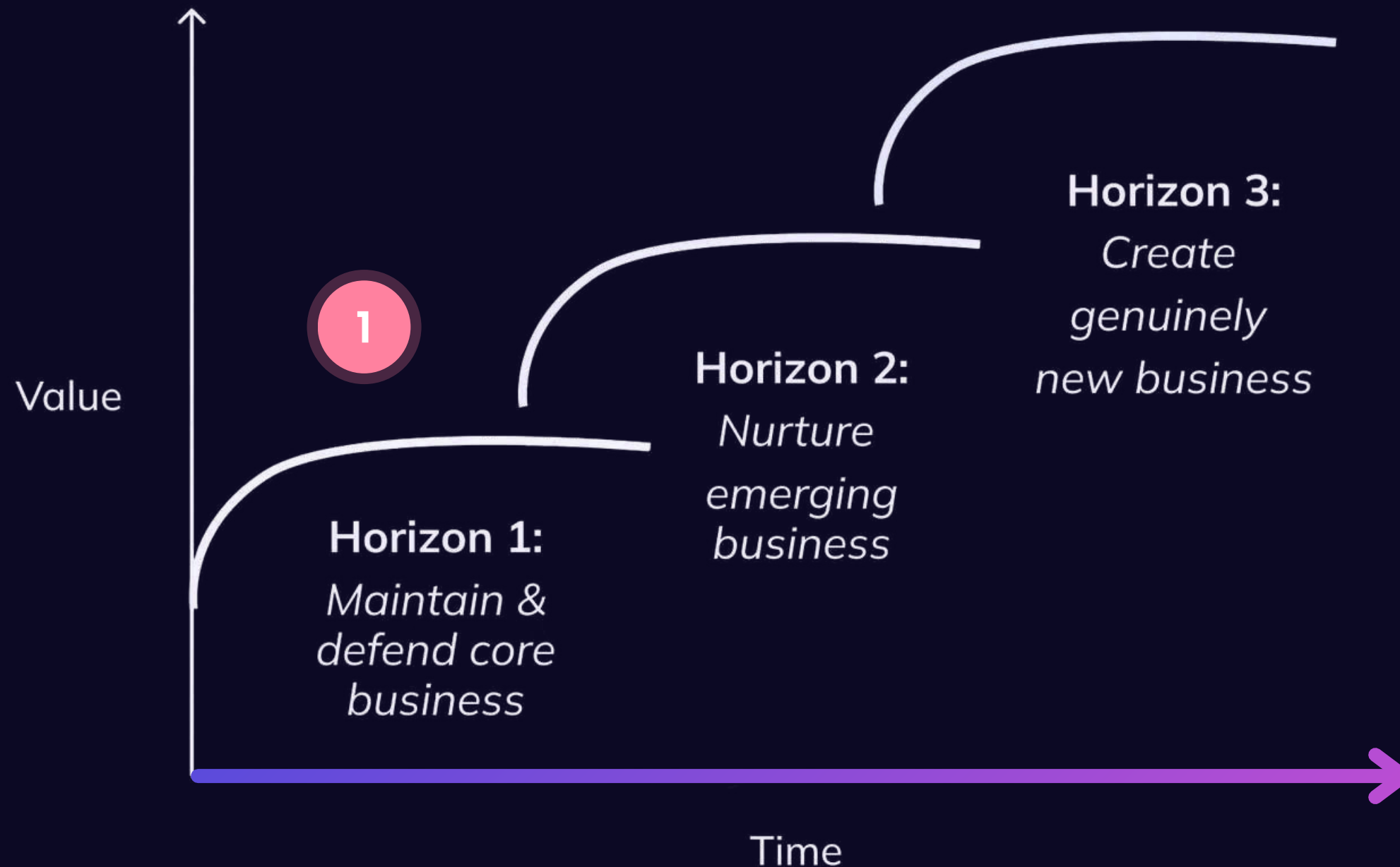
- Balanced Scorecard (BSC)
- Agile Project Management
- OKR's (Objective and Key Results)
- Scenario Planning
- Lean Management
- SWOT Analysis
- Rolling Forecasts
- Kaizen (continuous improvement)
- KPI Dashboards
- Eisenhower Decision Matrix
- McKinsey 3 Horizons



Three Horizons Framework



Horizon 1: Maintain & Defend Core Business

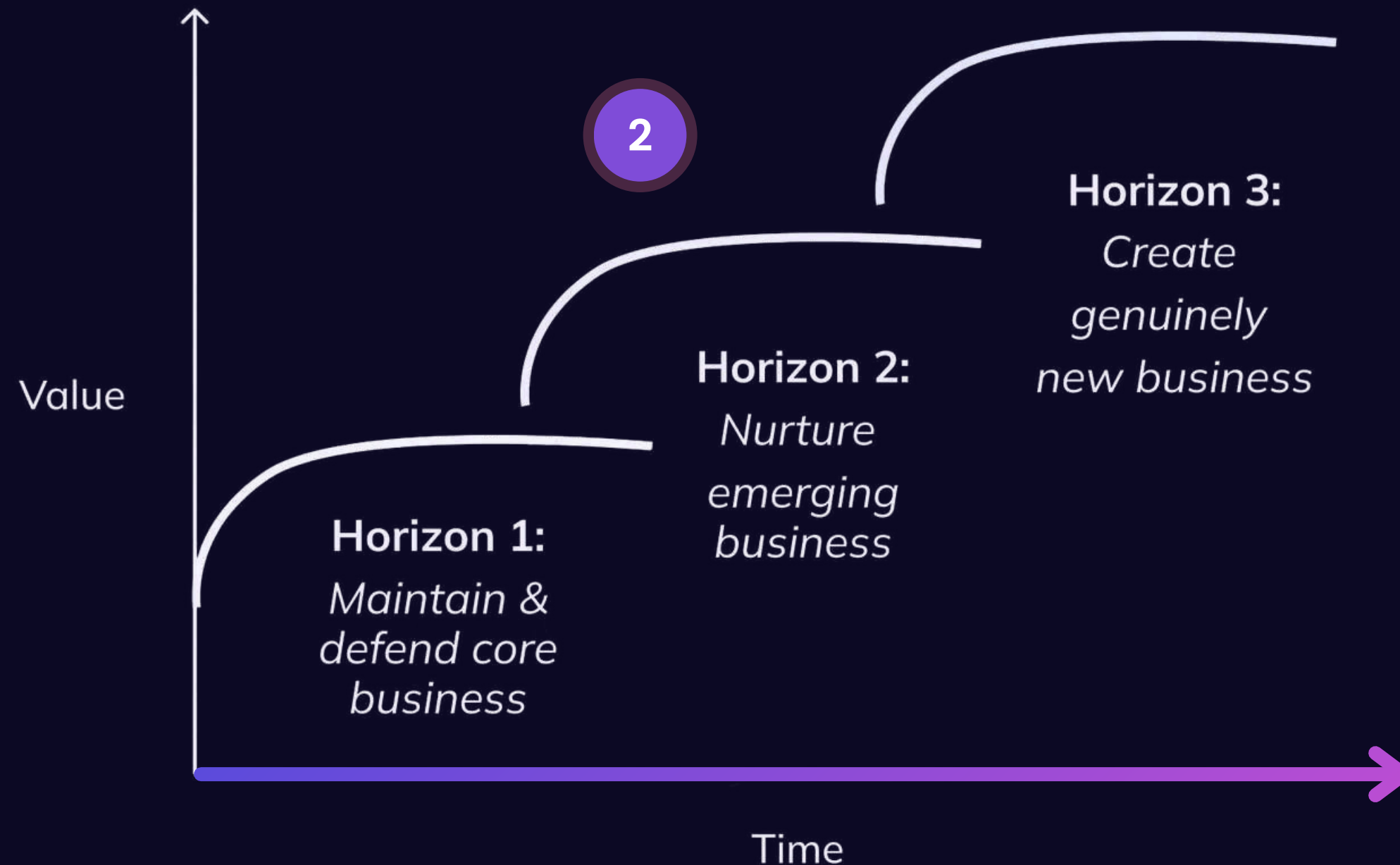


Your goals in Horizon 1 should be focused on improving margins, improving current business processes, and increasing short-term profits.

EXAMPLE

- Day-to-day goals associated with selling, marketing, and serving your offering and customers.
- Product upgrades, new features, or adding new services to existing products.
- Introducing a subscription model for existing products.
- Launching new services such as customer service, technical support, or digital marketing.

Horizon 2: Nurturing Emerging Business

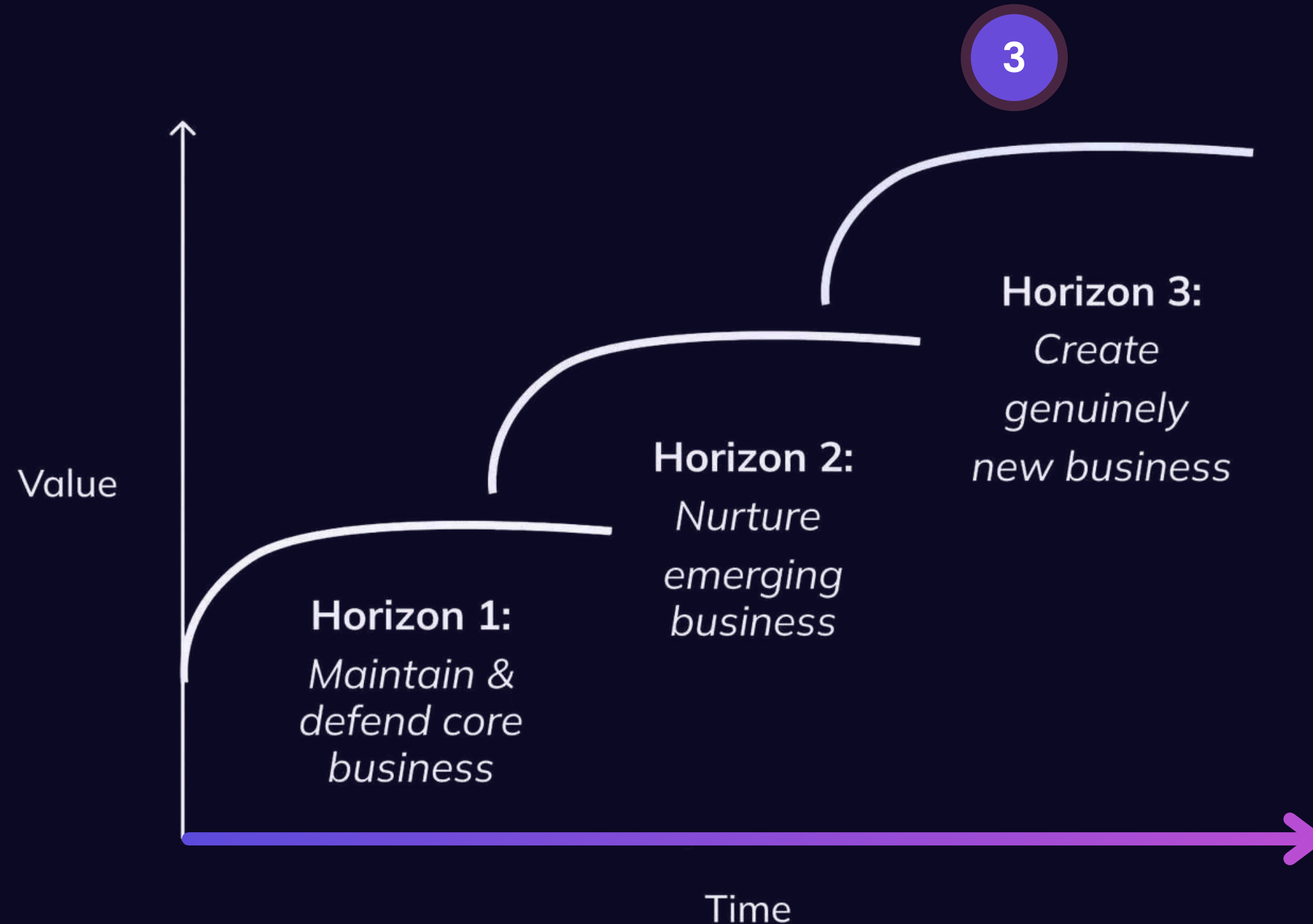


Some of these initiatives will be absorbed into your business as usual, others will pave the way for the emergence of radically different strategic initiatives under Horizon 3.

- Launching new product/service lines.
- Expanding your business geographically.

EXAMPLE

Horizon 3: Create Genuinely New Business

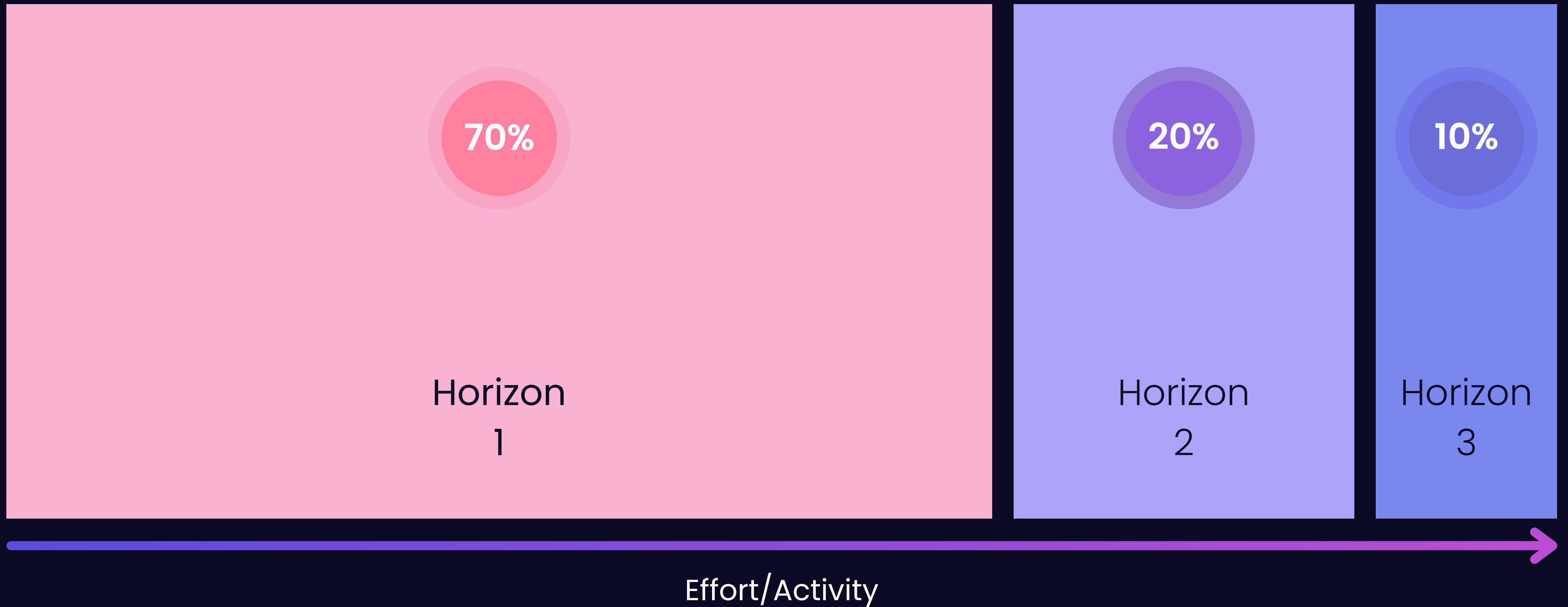


The third horizon can encompass up to ten years or more and focuses on creating growth opportunities, exploring new markets.

EXAMPLE

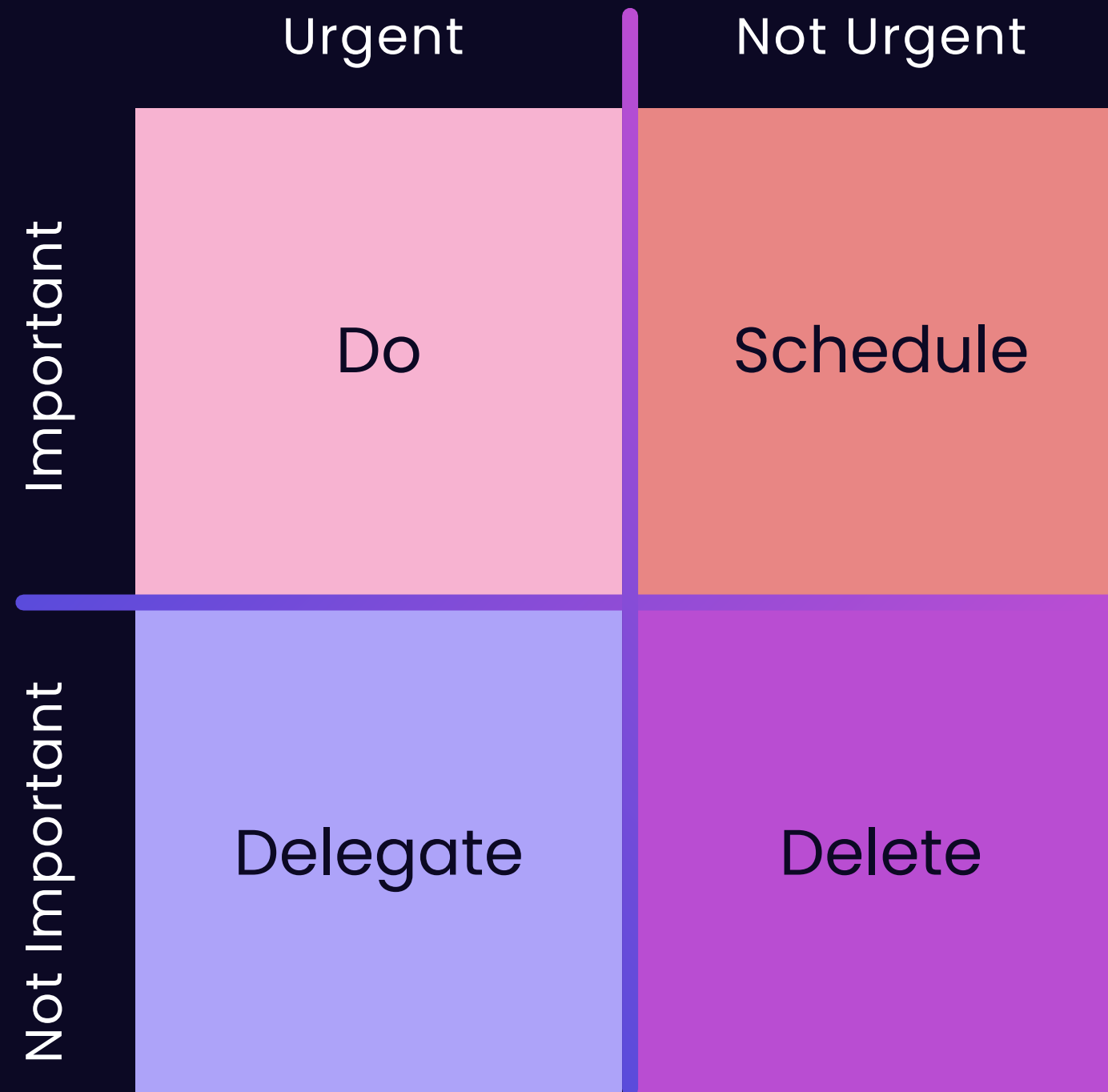
- Development of new products, the research and development of AI or automation.
- Development of completely new technologies or services.
- Research projects, pilot programs.
- Start up of completely new business units through mergers and acquisitions.

The 70 / 20 / 10 Rule



NOW LET'S LOOK AT **WHAT YOU
CAN DO ON AN INDIVIDUAL
LEVEL** TO HELP WITH
BALANCING YOUR ACTIONS...

The Eisenhower Matrix



Do

Urgent and Important: These are tasks that require **immediate attention and are crucial to your long-term goals**. They demand your focus and should be dealt with promptly.

Schedule

Important but Not Urgent: These tasks contribute to your long-term objectives but **don't require immediate action**. They should be scheduled and given sufficient time for thorough completion to prevent them from becoming urgent later.

Delegate

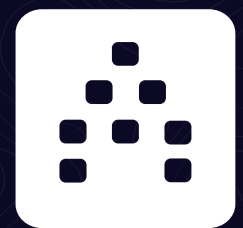
Urgent but Not Important: These tasks may seem pressing but need to align with your long-term goals. **Delegating or minimising time spent on these tasks is advisable** to free up time for more crucial activities.

Delete

Not Urgent and Not Important: These tasks are neither urgent nor essential to your goals. They are often **distractions that should be minimised or eliminated** altogether to focus on more meaningful activities.

ASK YOURSELF DAILY
IF YOU ARE IN BALANCE
AND IF NOT, HOW CAN YOU GET
YOURSELF/YOUR TEAM TO ULTIMATELY
CONTRIBUTING TOWARDS YOUR
BUSINESS' BALANCE AND STABILITY?

TRANSFORM THE WAY
YOU DO STRATEGY.



cascade



Is your strategy feeling all over the map?

REVENUE

Account Group	Account	01/2022	02/2022	03/2022	04/2022	05/2022	06/2022
Revenue	Revenue - Manufactured Materials	\$120,000	\$108,000	\$96,000	\$102,000	\$108,000	\$110,400
	Revenue - Plastics	\$240,000	\$216,000	\$120,000	\$132,000	\$134,400	\$138,000
	Revenue - Recycled Materials	\$200,000	\$180,000	\$160,000	\$166,000	\$171,600	\$175,200
Revenue Total		\$560,000	\$504,000	\$376,000	\$400,000	\$414,000	\$423,600

EXPENSES

Account Group	Account	01/2022	02/2022	03/2022	04/2022	05/2022	06/2022
COGS	Beginning Inventory	\$70,000	\$60,000	\$50,000	\$52,000	\$52,000	\$52,000
	Cost of Direct Labor	\$15,000	\$10,000	\$30,000	\$31,000	\$33,000	\$34,000
	Ending Inventory	-\$20,000	-\$18,000	-\$25,000	-\$24,000	-\$25,000	-\$25,000
	Overhead Manufacturing Cost	\$20,000	\$18,000	\$25,000	\$24,000	\$25,000	\$25,000
COGS Total		\$85,000	\$70,000	\$105,000	\$117,000	\$135,000	\$136,000
Non Operating Expense		\$7,700	\$9,100	\$8,700	\$8,000	\$9,400	\$9,000
Expenses Total		\$92,700	\$79,100	\$113,700	\$125,000	\$144,400	\$145,000

CA ANZ Strategic Plan – Difference Makers

OUR PURPOSE: We support our members to make a difference in the communities in which they work and live. We are committed to advancing the profession through high ethical standards, delivering world class services and education and advocating for the public good.

KEY PILLARS: World class member experience, Our brand and influence, Sustainable profession and professional body, Digital transformation and delivery, A culture of Difference Makers.

FOCUS AREAS: Understanding our members' needs, Member learning & support, Our brand and influence, Privacy, regulatory and compliance excellence, Elevating the CA difference, Honesty & integrity, Sustainable "recycling" model, Enhanced governance & assurance, Getting the foundation right, Digital experience, Digital team experience, Organizational rights & flexibility, Putting our potential to work, Inclusion & diverse culture.

INITIATIVES: Member insights, Bold, visible advocacy and thought leadership, Sourcing the talent of the future, IT foundations, Integrated talent management, Multi-channel engagement strategy, Market-leading professional standards and conduct, Future membership programs and pathways, Data strategy and architecture, Leadership, Tailored professional development, Difference Makers, Adaptive organisation, Data, business intelligence & analytics, Workplace flexibility, Relevant member support, Digital newsroom, Sustainability, Digital capability and culture, Inclusion and diversity strategy, Personalised engagement model, Enhanced assurance, Seamless digital experience platform, Wellbeing strategy, Best practice governance, Personalised user experience.

OUR CHARTER: Membership Body, Advocacy, Regulator, Tertiary Provider. OUR VALUES: Collaborate, Integrity, Diversity, Accountability, Grow.

Corresponding Connections - FP&O

Date	01/2022	02/2022	03/2022	04/2022	05/2022	06/2022
Revenue Total (\$)	\$420,000	\$372,000	\$300,000	\$320,400	\$332,400	\$340,800
Revenue Stream 1 (\$)	\$120,000	\$108,000	\$96,000	\$102,000	\$108,000	\$110,400
Revenue Stream 2 (\$)	\$240,000	\$216,000	\$120,000	\$132,000	\$134,400	\$138,000
Revenue Stream 3 (\$)	\$60,000	\$48,000	\$84,000	\$86,400	\$90,000	\$92,400
COGS Total (\$)	\$135,000	\$110,000	\$120,000	\$124,000	\$129,000	\$132,000
Beginning Inventory (\$)	\$70,000	\$60,000	\$50,000	\$52,000	\$53,000	\$54,000
Cost of Direct Labor (\$)	\$15,000	\$10,000	\$30,000	\$31,000	\$33,000	\$34,000
Ending Inventory (\$)	-\$20,000	-\$18,000	-\$25,000	-\$24,000	-\$25,000	-\$25,000
Manufacturing Cost (\$)	\$20,000	\$18,000	\$25,000	\$24,000	\$25,000	\$25,000
Purchase (\$)	\$50,000	\$40,000	\$40,000	\$41,000	\$43,000	\$44,000
Expenses Total	\$7,700	\$9,100	\$8,700	\$8,000	\$9,400	\$9,000

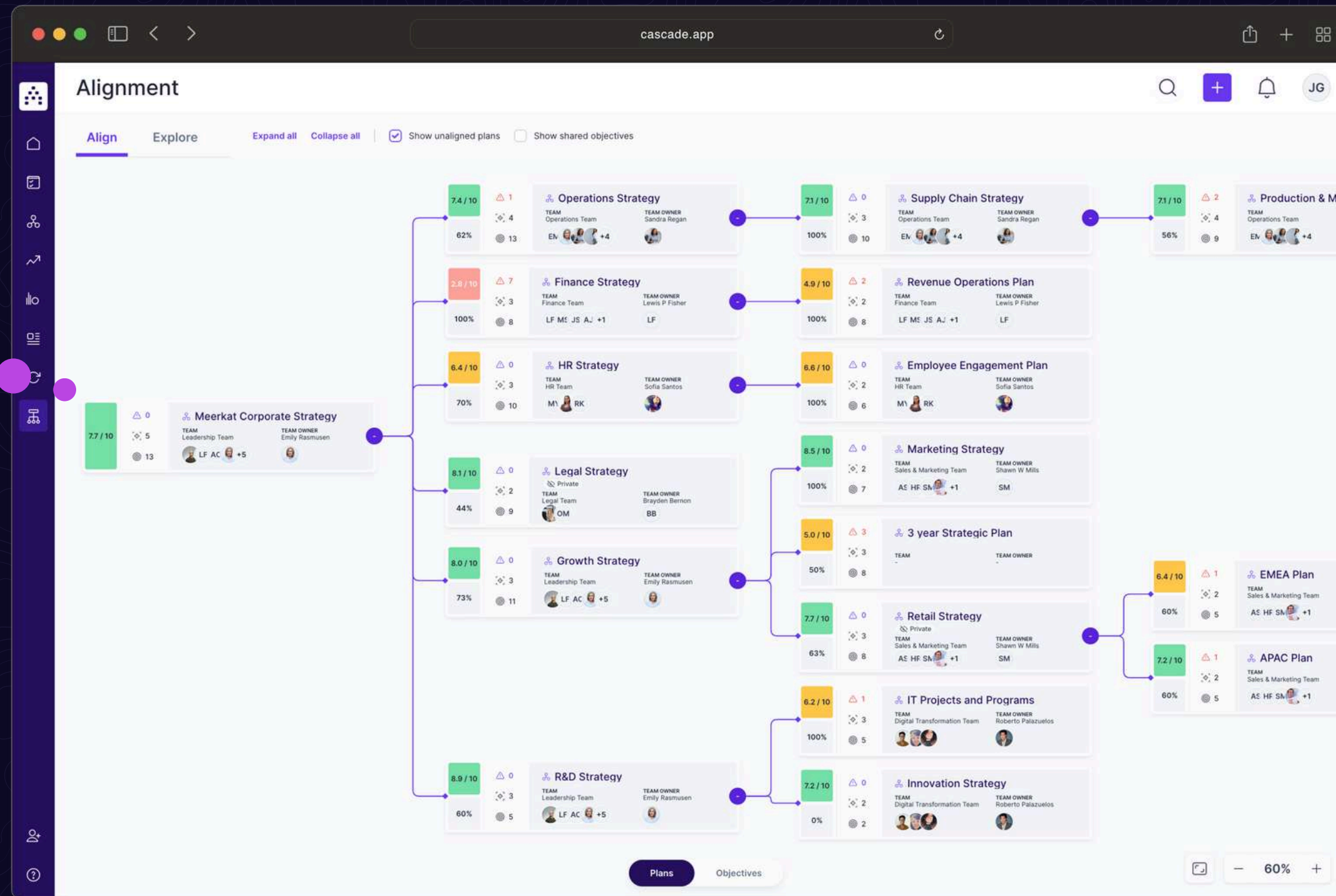
Year	2009	2010	2011
Revenue	\$18,840	\$17,628	\$16,368
Expenses	\$3,000	\$3,972	\$3,588
Profit	\$15,840	\$13,656	\$12,780

Contoso Environmental Clearance

Flowchart: Notice of Intent -> Proposed Action -> Are impacts significant? -> Decision Memo.

Comments: Filip Safranek: Coralie, can you revisit want to get her depo

Support, Inclusivity, Sustainability and Compliance icons.



No more slow decision-making.

No more slow decision-making.

No more working in silos.

No more slow decision-making.

No more working in silos.

No more wasted time.

PLAN · EXECUTE · TRACK

**Accelerate with
Cascade's simple
but powerful
formula.**



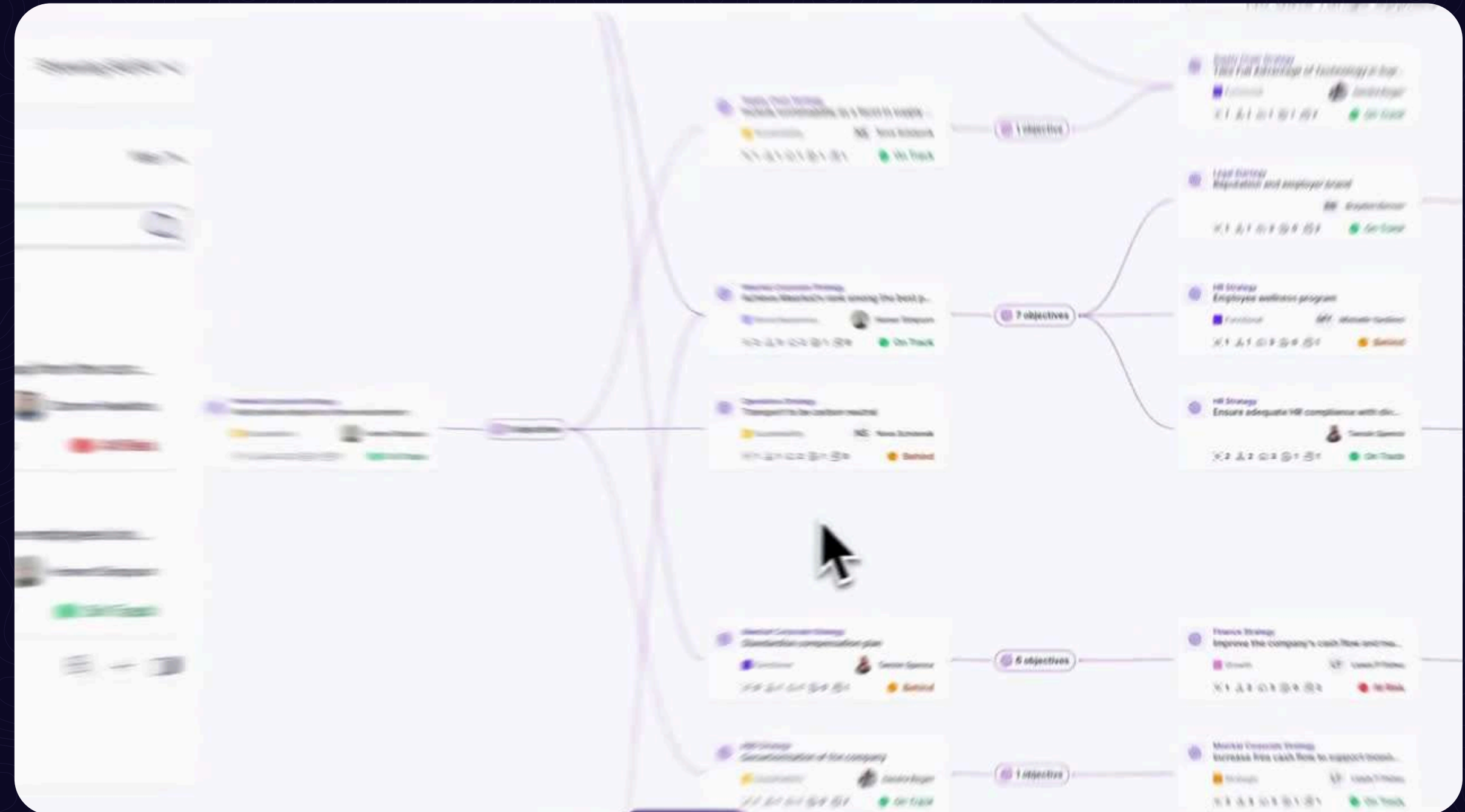
PLAN

The screenshot displays a software interface for managing a plan. On the left is a dark purple sidebar with icons for home, calendar, network, line graph, settings, list, refresh, and a gear. The main content area is white and titled "Plan details" with a "Reorder plan" button. Below the title are three expandable plan items:

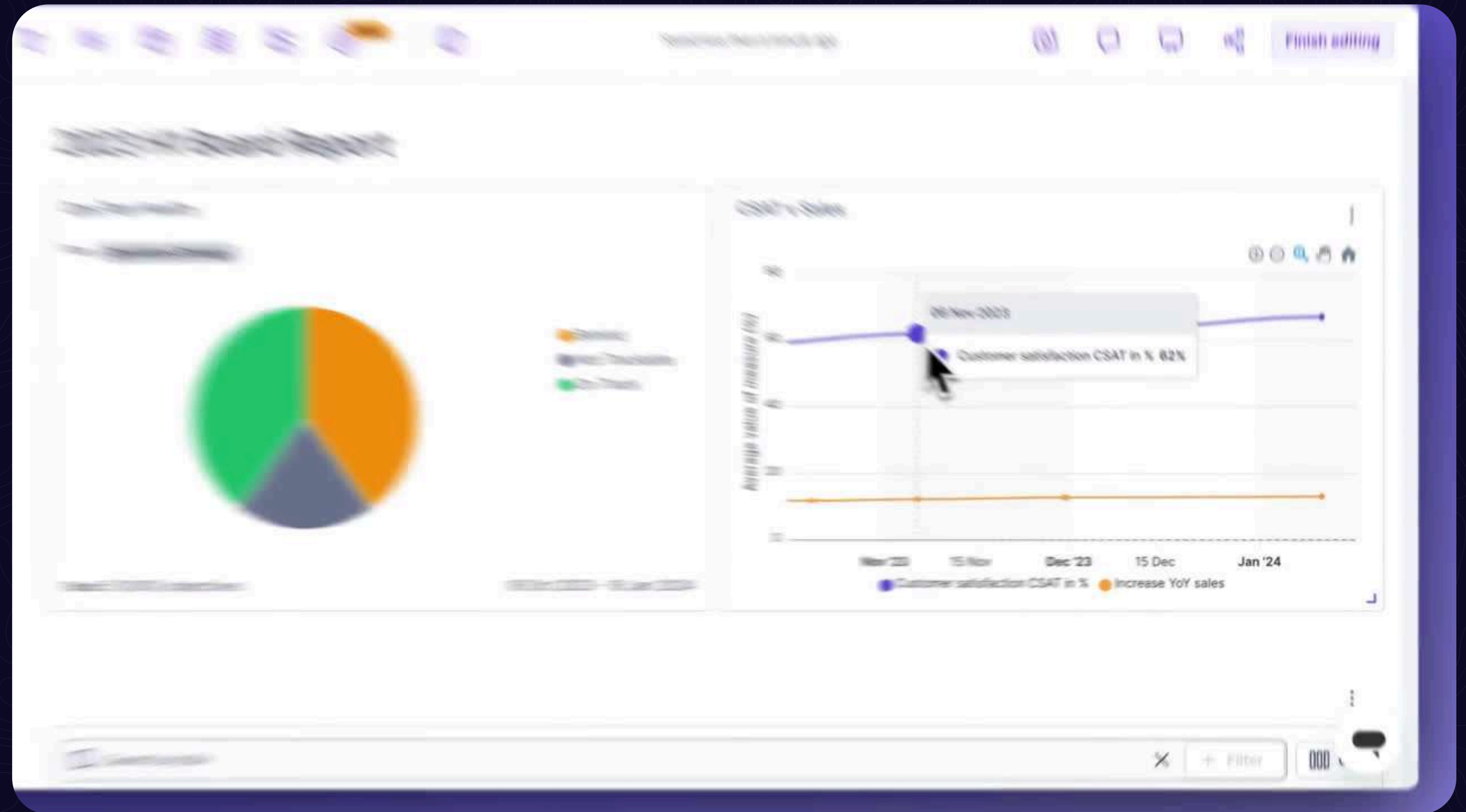
- Sustainability** (Operational): Represented by a target icon and a blue square.
- Tech Transformation** (Transformation): Represented by a target icon and a yellow square.
- Modernize and streamline processes at all plant locations** (Operational): Represented by a target icon and a green square.

A mouse cursor is pointing at the plus icon between the Tech Transformation and Modernize items. A fourth item, "Use technology to improve delivery efficiency" (Operational), is partially visible at the bottom.

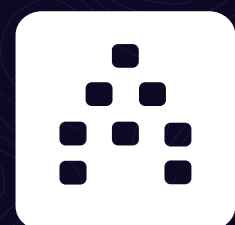
EXECUTE



TRACK



Book a demo



cascade

90% OF STRATEGIES FAIL BE PART OF THE 10%



Q & A

Let's do this!

Happy Cascading!

