Agile Strategy Implementation

A few years back, I took some time off from my consulting business to be the CTO of one of my clients. One of the terrific parts of the job was that I had the opportunity to get much more familiar with Agile software development and even pick up a few certs. Upon returning to my strategy consulting practice, I found many of the Agile concepts had affected how I consider a number of aspects strategy, and in particular, strategy implementation. I thought it might be worthwhile to share a few things. I am in no way trying to strictly incorporate Agile methodology; just seeing if there's some lessons learned that can make strategic planning, especially plan implementation more effective.

Strategy vs. Roadmap – Typically strategy in embodied in a plan, which will include vision, mission, goals, and objectives. Objectives are achieved via action items which have costs, schedules, etc. There isn't a lot of opportunity to dynamically change the plan other than relatively static events like quarterly reviews. The parts of the plan that were relatively straight forward (like winning the business you already had in your sights) goes forward, the parts of the plan that required new product or service development, acquiring new customers or entering new markets is more problematic. Sometimes things don't get resourced because they were important, but not urgent, and resources get diverted away; sometimes things get resourced and project set in motion stay in motion even as priorities change.

An alternative approach might be to put together more of a high level roadmap driven by the vision of where you want the business to be. The action items can be treated more like the Agile

product backlog, and dynamically reprioritized. In this case, instead of trying to execute a plan on schedule and within budget, we're trying to get high priority action items complete within a fixed timebox (I like a month) so we can demonstrate progress on our roadmap quarterly. Sort of like sprints and releases. So now I'm less focused on goal like entering a new market, and more concerned with smaller, more doable action items like writing a white paper or executing a calling plan. I'm more likely to get the higher priority things done, and achieve the goal, even if I don't do some of the lower priority action items.

In a few cases, I've mapped out the action items on an online Kanban Board (there are several free ones available) so the action items can be tracked as ready to be done, in process, and done. With the board, I like to break the action items down even smaller: a white paper becomes research, and outline, a draft, review, final, publish internally, publish externally. The idea is to have a continuous stream of very small accomplishments demonstrating an organization's ability to achieve and build upon continuous incremental change in support of bigger goals.

At the end of the day, the benefits I liked most about Agile were the ability to reprioritize based on actual need rather than upfront anticipated need, and the ability to stop when actual needs were met. Both of which would be good attributes to bring to strategy implementation.

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