

Continuous Adaptive Strategy Execution (CASE)

Introducing CASE: A framework for creating, communicating, optimizing, and delivering organization and product strategy

Introduction

Traditional annual strategy planning cycles are inadequate in today's rapidly evolving business landscape. Organizations require a more agile and responsive approach to remain competitive amidst constant market flux. Continuous Adaptive Strategy Execution (CASE) is a framework designed to meet these demands, ensuring organizations can adapt swiftly and effectively to new challenges and opportunities.

CASE redefines strategy as a living process, reacting to events, and emphasizing ongoing adaptation over static planning. CASE aligns strategic initiatives directly with the current and most pressing organizational challenges by focusing on challenge-based strategy creation. Through CASE, organizations are equipped to dynamically navigate the complexities of modern markets, maintaining a competitive edge by constantly refining their strategic goals and methods.

What is CASE?

CASE is a paradigm that integrates continuous planning, feedback, measurement, and execution into the strategy management process. CASE posits that strategy should evolve dynamically based on real-time data and honest feedback from all sources. This approach enables organizations to pivot quickly, seizing opportunities and mitigating risks as they arise.

Key Principles of CASE

- **Agility:** Organizations revisit strategies and adjust continuously, not annually, allowing swift responses to change.
- **Engagement:** This empowers all levels of the organization to contribute ideas and feedback, fostering innovation and providing leadership with invaluable and timely feedback.
- **Learning and Adaptation:** Encourages iterative learning from successes and failures, ensuring strategies improve over time.
- **Alignment and Execution:** Ensures Execution and strategic goals are aligned, maintaining focus and coherence across the organization.

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At its core, Continuous Adaptive Strategy Execution (CASE) embodies pragmatic wisdom, challenging the outdated practice of annual strategy formulation followed by a company-wide all-hands-meeting reveal. Dictating strategy to those who are masters of their craft, typically by rolling out a yearly roadmap like this, is as effective as offering unsolicited advice to a brain surgeon mid-operation—presuming, of course, that brain surgeons aren't the primary audience of this book.

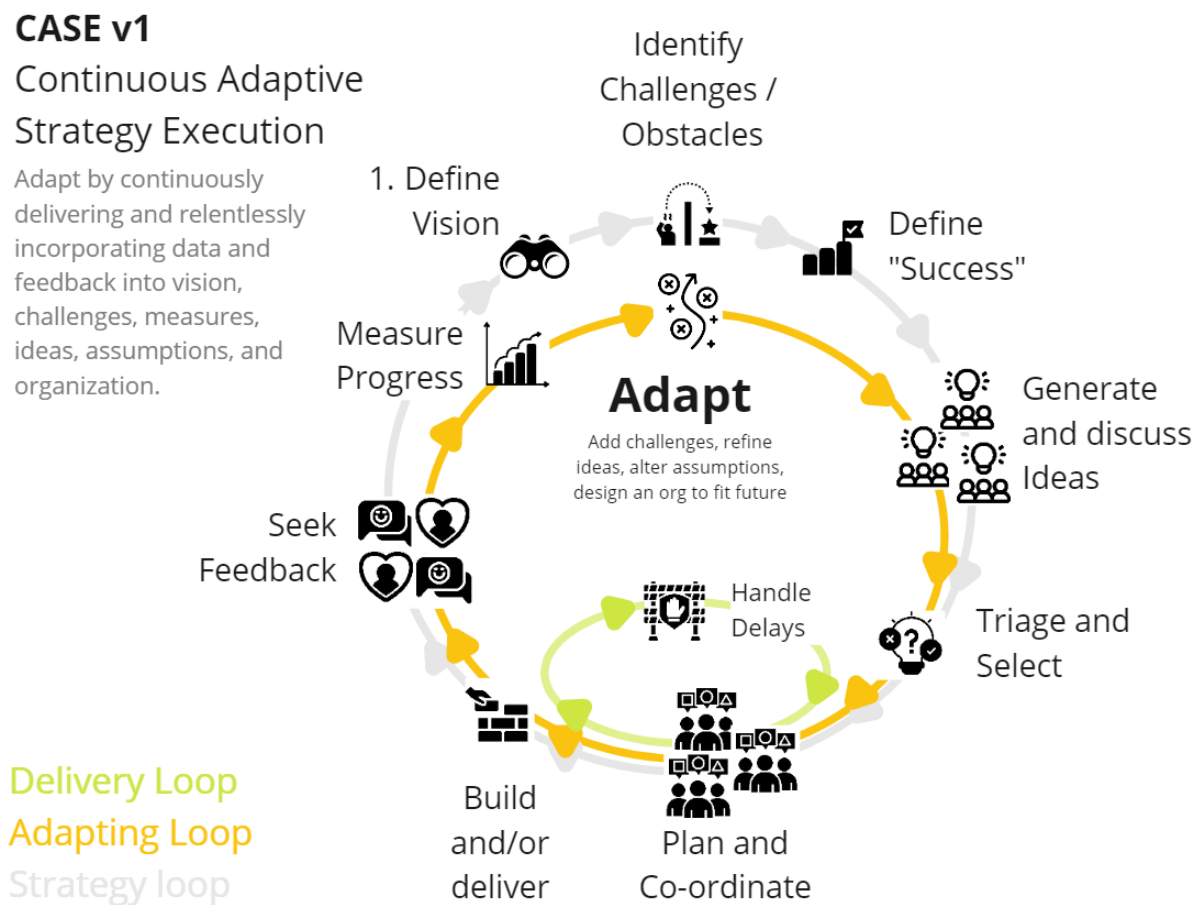
CASE is an engine for perpetual feedback, drawing insights from customers, competitors, developers, sales staff, and even AI like ChatGPT. It's not merely about gathering this feedback but strategically employing it to refine and adapt strategies continuously.

Here is a visual depiction of CASE -

CASE v1

Continuous Adaptive Strategy Execution

Adapt by continuously delivering and relentlessly incorporating data and feedback into vision, challenges, measures, ideas, assumptions, and organization.



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CASE unfolds across three interconnected loops, each a critical phase in the organization's journey toward resilience and success:

1. **Strategy Loop:** Leadership crafts and hones the long-term vision, sets a unified direction and defines success in every decision.
2. **Adapt Loop:** This loop integrates feedback and data into the strategic framework, fine-tuning actions to hasten the achievement of goals and the realization of the vision.
3. **Delivery Loop:** This is where teams turn ideas and actions into tangible outcomes—products or services. Delivery is essential for learning and adapting; it's the practical step towards actualizing strategic ambitions.

These loops, while diagrammatically sequential for simplicity's sake, operate far more dynamically in practice. The initial adherence to sequence soon leads to more agile, direct paths as the organization learns to navigate the process more intuitively. This flexibility—knowing when to deviate from the set path—is the ultimate aim of CASE, providing just enough procedural guidance to recognize when it's best set aside. Achieving this level of adaptability is the essence of CASE, marking the transition from rigid adherence to fluid, effective strategy execution.

The Case for CASE

Annual strategy planning makes it difficult for organizations to navigate market dynamics, technological breakthroughs, and unforeseen obstacles. If “strategy” is identifying and overcoming challenges on the way to a longer-term objective, then how can doing it once a year be successful? New challenges will always emerge, and we learn about others by taking steps to solve one challenge. The strategy needs to be dynamic. It needs to be an automatic and continuous pursuit of reaching a vision.

Many organizations react on the fly to each emerging mini-crisis precisely as they should. Continuous Adaptive Strategy Execution (CASE) enables this adaptability while ensuring cohesion with the overarching company vision and establishing a shared framework for prioritizing how urgent change is versus staying on the planned path. Without a shared strategy, decisions made at any team or product level appear logical in isolation but often lead to misalignment (or conflict) with the broader organizational objectives.

If the following scenarios are familiar to you:

- Each November, there is an intense period of planning activity to outline the following year's roadmaps and budgets, only to find that nothing you planned gets delivered that year.
- A culture in which leaders escalate tasks to get them completed leads to a cycle in which everything seems to require escalation.

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- Teams are perpetually busy, but their efforts aren't aligned with strategic objectives.
- Your organization is overwhelmed by an abundance of OKRs, or other performance management scheme, with each team member pulling in a different direction and little to no movement on these objectives.

Then, it's time to explore CASE. Implementing CASE doesn't demand a significant increase in effort; instead, it optimizes and connects existing business activities your company is already doing. CASE can significantly enhance efficiency and outcomes by streamlining activities, distributing effort more evenly throughout the year, and integrating feedback and data-driven insights into decision-making.

Consider CASE your strategic framework if you seek to break free from the cycle of reactive planning and misaligned efforts. It's about doing more with what you already have—smarter, not harder—by infusing adaptability and alignment into every layer of your organization.

The Loops

Strategy Loop

The Strategy Loop in CASE ensures that an organization remains agile and responsive to a dynamic market environment. This loop continuously updates the organization's vision, identifies new challenges, and refines success metrics as market conditions evolve and internal feedback guides.

Key elements of the Strategy Loop are:

1. **Continuous Vision Update:** While the core vision might remain stable, the strategies to achieve this vision need regular updates to reflect changing market conditions. This dynamic approach helps prevent the stagnation that has historically led to the decline of once-dominant companies like Blockbuster and Nokia, which failed to adapt their business strategies in response to technological advancements and evolving consumer preferences.
2. **Feedback Integration:** Effective strategy loops incorporate feedback from all levels of the organization, creating a culture where challenging the status quo is encouraged and where leadership is responsive to feedback. Such an environment ensures that the organization doesn't become an echo chamber, merely reinforcing outdated strategies without adapting to new information.
3. **Regular Review of Challenges and Metrics:** The strategy loop involves revisiting and revising the organization's strategic challenges and metrics based on real-time data and feedback from the market and internal sources. This continuous cycle of evaluation and

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adaptation is crucial for aligning the organization's efforts with its strategic objectives and market realities.

4. **Adaptation and Innovation:** By continuously updating challenges and metrics, organizations can pivot their strategies effectively, avoiding the pitfalls of irrelevance. This cycle of delivery, feedback, and strategic adaptation is essential for staying competitive in rapidly changing markets and seizing new opportunities.

The strategy loop enables organizations to be nimble and adjust their trajectories as needed. This agility is vital for sustained growth and innovation, ensuring the company remains aligned with external market conditions, internal capabilities, and goals.

Implementing a robust strategy loop requires committed leadership prioritizing listening and learning as fundamental components of the organizational culture. Leaders must foster an environment where feedback is sought from everyone, respected, and acted upon to refine strategies continually.

In summary, the strategy loop facilitates a proactive approach to strategic planning, where visions are not static but are constantly refined in response to new challenges and opportunities. This approach helps avoid the dangers of being outpaced by market changes and positions organizations to exploit emerging opportunities, proactively driving sustained success and relevance.

Adapting Loop

The Adapting loop plays a crucial role in strategic management by ensuring that an organization's strategy remains agile and responsive to new information and environmental changes. This approach is integral to maintaining a dynamic alignment between an organization's vision and operational reality, facilitating timely adjustments that will significantly influence long-term success.

Key elements of the Adapting loop are:

1. **Feedback on Delivered Work:** Strategic adaptation often starts with reflecting on the outcomes of specific initiatives or projects. This step assesses whether the actions effectively moved the organization closer to its strategic goals. It's not just about whether teams did work but whether they contributed to the strategic objectives. Did these efforts help the organization advance toward its vision? This evaluation can lead to strategic refinements, helping to ensure that future efforts are more aligned with the overarching goals.
2. **Evaluating Organizational Constraints:** An honest appraisal of organizational constraints—such as resource limitations, skills gaps, or structural inefficiencies—can provide critical insights into the internal factors that may hinder strategic execution. Understanding these barriers enables leadership to make informed decisions about

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where to invest in organizational development, potentially reshaping the strategic plan to accommodate or overcome these limitations.

3. **Revision of Vision:** An organization's vision is driven by its strategy, which should evolve based on new insights and external changes in the market or industry. The Adapt loop challenges the static nature of long-term goals by integrating new learning and insights into the strategic vision. Given the current landscape, adjusting the vision to be more achievable, relevant, and competitive ensures the organization remains forward-looking and adaptable.
4. **Ideation and Strategic Innovation:** Based on the insights gathered from ongoing and past activities, there may be a need to pivot or innovate strategically. Abandoning outdated ideas, adopting new approaches, or exploring new opportunities aligning with the revised vision are all possibilities. The capacity to adapt ideation processes based on real-world feedback and results is crucial for maintaining a strategy that is not only resilient but also proactive in capturing new value.

A successful Adapt feedback loop is vital for sustaining strategic relevance and effectiveness. It ensures that the organization does not merely react to changes but anticipates and adjusts proactively, maintaining a competitive edge. This loop represents a critical feedback mechanism for refining strategy, aligning it closely with the external environment and internal capabilities.

In practice, fostering a strategic culture that embraces this adaptive loop requires leadership commitment to ongoing learning, openness to change, and a strategic planning process that integrates these insights into decision-making (the purpose of CASE). By doing so, organizations can avoid the pitfalls of rigid planning and instead cultivate a flexible approach to remain aligned with their evolving strategic vision.

Delivery Loop

The Delivery Loop is where teams turn challenge-solving ideas into actual products or services.

Key elements of the delivery loop are:

1. **Accelerating Feedback:** The delivery loop's speed is crucial because a swift execution phase enables faster customer feedback. This rapid feedback is vital for informing the Strategy and Adapt loops, ensuring that strategies are responsive and based on current realities rather than outdated assumptions.
2. **Reality Check for Ambitions:** It acts as a reality check for the organization's ambitions. Some ideas might seem excellent on paper but are challenging to implement due to technical constraints, complexity, or unforeseen risks. The delivery loop helps identify which ideas are practical and which are not, guiding strategic decision-making.
3. **Inclusion of Local Experts:** Often, there is a gap between those who devise strategies and those who implement them. Including "local experts"—the engineers, developers, and operational staff—in the ideation and strategic adaptation processes can

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significantly reduce this gap. These practitioners bring a grounded perspective to the table, assessing the feasibility of ideas and suggesting practical improvements or alternatives.

4. **Coordination and Focus:** Once ideas are selected, the delivery loop focuses on coordination and execution. Effective management ensures that teams remain focused on the strategic goals, steering the organization toward timely delivery of its commitments.
5. **Balancing Investment and Innovation:** The delivery loop also involves balancing the scale and risk of the ideas chosen for implementation. Investing in overly ambitious or risky ideas without adequate preparation can stall the loop, whereas a balanced approach helps maintain a steady flow of innovation and returns.

Integrating the delivery loop into the organization's strategy and adaptation processes ensures that strategic plans are ambitious and grounded in operational reality. It helps maintain a dynamic balance between innovation and practical implementation, enhancing the organization's agility and ability to respond to market changes.

Moreover, by involving local experts in strategic discussions, organizations can leverage their deep operational knowledge to refine strategies and enhance their applicability. This collaborative approach not only boosts morale but also improves the quality of the output, aligning it more closely with the organization's capabilities and market needs.

The delivery loop is about more than just doing (perhaps poorly named); it's about learning and adapting swiftly from the doing. Improving an organization's strategic processes is crucial for maintaining relevance and effectiveness. This loop ensures the strategy is a living, evolving framework capable of responding to new challenges and opportunities. Thus, for any organization committed to innovation and adaptability, optimizing the delivery loop is critical to sustainable growth and success.

The Activities (“jobs to be done”)

Successful organizations already have strategies and ways to plan a portfolio of work. The following eleven activities, or jobs, are currently performed by someone or some people. CASE spells them out here to help optimize and interconnect these activities into a more unified continuous process. It's important to realize that companies do many things and have many products or services. These activities often overlap concurrently at different times or intensities for other products or service lines.

Activity 1 - Creating a Customer-Centric Long-Term Vision

The cornerstone of any thriving business is its long-term vision. A well-crafted vision serves as a north star, guiding the company through the ups and downs of business cycles toward a future

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where it realizes its full potential. The most potent visions place the customer at their core, promising growth for the company and significant benefits for its customers.

This vision isn't just a fluffy motivational statement. It is a beacon for decision-making and strategy development, motivating and aligning your teams. When articulating this vision, it's essential to focus on the benefits for your customers, as they are the cornerstone of your business's growth and success.

The Essence of a Customer-Centric Vision

A customer-centric vision shifts the focus from what the company wants to achieve to how it can transform its customers' lives. It articulates a future where the company's efforts and innovations lead to meaningful improvements in its customers' lives, thereby creating a loyal customer base that is integral to its long-term success.

While non-customer-facing objectives can guide internal strategies and operational goals, they should avoid dominating the company's innovation agenda. Innovations should be inspired and aligned with customer needs and preferences to ensure market relevance and drive sustainable growth. Keeping non-customer-facing visions out of the development pipeline emphasizes the importance of customer-driven innovation. Internal objectives related to profitability and efficiency are vital but should be framed to indirectly enhance customer satisfaction and loyalty, thereby fueling the company's success.

Vision is different from a mission. A mission expresses what one or many want to achieve (the destination). Vision is what the outcome of accomplishing that mission brings to customers. They are subtle differences, but vision allows collaboration on ideas—a mission hands down the idea, stifling collaboration and exploring many ways to reach the long-term goal.

Crafting Your Vision Statement

1. **Start with 'In X years, our company will [be]...':** This opening sets a clear timeframe, making your vision specific, measurable, and time-bound. It instills a sense of urgency and direction, propelling your organization forward.
2. **Emphasize the Benefit to Customers:** Clearly articulate how your customers' lives will improve because of your company. Will they be happier, healthier, more connected, or more productive? Your vision should vividly paint a picture of this future.
3. **Ensure It's Ambitious Yet Achievable:** Your vision should be bold enough to inspire and challenge your team but grounded in reality to remain achievable. It should stretch your organization's capabilities without straying into fantasy.
4. **Make It Memorable and Inspiring:** Use compelling and evocative language to make your vision statement memorable. It should resonate emotionally with employees, customers, and stakeholders, motivating them to take action.

Examples of Effective Long-Term Visions

John F Kennedy stood before Congress on May 25, 1961, and proposed that the US¹

"[should commit itself to achieving the goal,] before this decade is out, of landing a man on the Moon and returning him safely to the Earth." This is a strong vision statement. It gives the timeframe and the audacious goal, but most importantly, it doesn't say how—just by when, who, and the intention.

Here are some more examples:

1. "In 10 years, [Company] will be at the forefront of the green energy revolution, making sustainable power accessible for homes worldwide, significantly reducing global carbon footprints."
2. "In 5 years, [Company] will have revolutionized how people connect, making distances irrelevant and enabling more meaningful human interactions through our technology."
3. "In 10 years, [Company] will redefine personal health, making proactive wellness and personalized medicine available to everyone, drastically improving global health outcomes."
4. "Within the next five years, [Company] will transform the educational landscape, ensuring interactive and immersive learning experiences are accessible to learners in every corner of the globe."
5. "By 2030, [Company] aims to revolutionize urban mobility, making eco-friendly and efficient public transport systems the backbone of cities worldwide, significantly reducing urban congestion and pollution."
6. "In 10 years, [Company] will lead the charge in global food security, leveraging cutting-edge technology to ensure sustainable, nutritious food is accessible to populations in every climate and region."
7. "Within five years, [Company] will pioneer the next generation of digital security, ensuring individuals and businesses worldwide can operate in a digital realm that is secure, private, and resilient against threats."
8. "In the next decade, [Company] will be at the vanguard of affordable housing, utilizing innovative design and construction techniques to provide quality, eco-friendly homes for underserved communities globally."
9. "Within five years, [Company] will redefine workplace productivity, creating AI-driven tools that automate mundane tasks, foster creativity, and support a balanced and fulfilling work life for professionals worldwide."

¹ the speech writer was reportedly [Ted Sorensen](#), but honestly, when do authors ever get the credit they deserve?

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10. "By 2030, [Company] aims to set new standards in water conservation, developing technologies and practices that ensure communities everywhere have access to clean, sustainable water sources."
11. "In the next ten years, [Company] will have reshaped entertainment, using immersive technologies to create experiences that bring stories to life in personalized, interactive, and accessible ways from anywhere in the world."

Summary

A compelling, customer-centric long-term vision is more than just an aspirational statement. It's a strategic tool that aligns your organization's efforts toward a common goal. It motivates your team, attracts like-minded talents and partners, and, most importantly, promises a better future for your customers. In crafting your vision, remember that specificity, customer focus, and inspiration are crucial to making it a powerful guide for your company's journey.

Activity 2 - Identify Challenges and Obstacles (Challenge-based strategy)

Identifying the challenges and obstacles between your current state and your long-term vision is critical in strategic planning. Breaking down the journey into smaller, incremental, solvable challenges makes achieving the long-term vision more manageable, measurable, and likely. Companies ensure they steadily move closer to their envisioned future by tackling these challenges in the proper order with the right urgency.

The goal is mapping the path by identifying incremental challenges in achieving progress toward your vision.

Understanding the Landscape

If you don't already have this, revisit the current operational, market, and competitive landscapes captured when creating the vision statement. Understand where you stand related to your vision regarding resources, market position, technological capabilities, and customer perceptions. This baseline understanding is crucial for identifying the gaps that need to be bridged.

Write down these assumptions, hypotheses, and beliefs. These will evolve continuously. The dysfunction of yearly analysis is its inability to cope with new information about the landscape as we learn and discover our beliefs were "less than correct."

Break Down the Vision into Key Challenge Areas

Segment your long-term vision into key focus areas, for example, technology development, market expansion, customer experience, operational efficiency, and company culture. This segmentation allows for a more focused approach to identifying challenges and setting goals.

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If you are operating a product company, the David Maclure pirate metrics can help identify the key areas that need simultaneous attention. Although intended to be metrics, they are also suitable for challenge areas in general for product and service companies:

Acquisition: Challenges in acquiring new customers

Activation: Challenges in getting people looking at your products, using and buying it

Retention: Challenges in getting customers to continue to use and pay

Referral: Challenges in getting customers to tell others

Revenue: Challenges in keeping and growing revenue

Having at least one challenge addressing each of these categories is the first goal for most product-led companies.

Identify Challenges and Obstacles

Identify specific challenges teams must solve for each key area to progress toward your vision. Challenges are obstacles between “now” and the “vision” of being successful. In the book *Good Strategy, Bad Strategy*², Richard Rumelt notes that bad strategy is often aspirational, a set of good things. This type of strategy doesn't cause change. At some point, if those aspirations are universally deemed good, why haven't we done it yet? Good strategy asks that exact question: why haven't we achieved that yet? These are challenges and are the basis of a “challenge-based” strategy. Challenge-based strategy uncovers problems, and these challenges need to be solved - they turn aspirations into actions (or the ideas that lead to action).

For each of the challenge areas listed above, challenge your company and yourself to think about what is between now and progress towards the vision.

Clean questions help people clarify thoughts, feelings, and the details of situations without leading the respondent or adding the questioner's assumptions. Here are some clean questions that could help facilitate challenge exploration:

- What changes would need to happen for [x] to happen?
 - This question helps identify specific alterations in the current model that are necessary to align with the future vision.
- What obstacles could prevent [company, product, service] from becoming ...?
 - Identifying current barriers can help strategize how to overcome them.
- What would [we] need to learn to become ... in ... years?

² *Good Strategy/Bad Strategy: The Difference and Why It Matters*, by Richard Rumelt

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- This question focuses on knowledge gaps or new competencies that teams and people need within the organization.
- What do we not know yet that is critical to this vision?
 - Identifying unknowns helps in focusing research and development efforts effectively.
- What steps would [company] need to take in the next one, three, and five years to align with this vision?
 - Helps in creating a roadmap with short, medium, and long-term goals.
- What impact would this change have on [company] existing business model?
 - Reflecting on the impact helps assess the readiness and resilience of the business against the required transformation.

Prioritize Challenges

Not all challenges are of equal urgency or importance. Prioritize them based on their impact on your vision, the feasibility of overcoming them, and the effort needed to progress. By asking a wide audience for challenges, you will end up with a pretty sizable and scary list, both a positive and a negative. It is better to have identified a challenge than blindly stumble into it later.

Prioring these challenges doesn't have to be exact. At this stage, there is so much speculation that near enough is the best anyone can hope for. There are three factors to consider:

Impact: The likely impact on progress towards the vision.

Confidence: The confidence that solving this challenge will lead to the impact speculated.

Effort: The effort involved relative to other challenges you could solve (some call this Ease).

A simple 5-point qualitative scale (low, low-medium, medium, medium-high, high) for each factor is enough to avoid missing anything urgent or opportunities too good to miss. The goal is quickly sorting the challenges from most to least critical.

This prioritization scheme is called ICE³. In general, it combines and balances these three factors into a score using the general formula:

$$\text{Priority} = (\text{Impact} \times \text{Confidence}) / \text{Effort}$$

This formula aims to choose the highest, most confident, and easiest challenges first. It is not exact, but it approximates and offers a way to quickly identify the diamonds in the rough.

³ Popularized by Sean Ellic ([https://en.wikipedia.org/wiki/Sean_Ellis_\(entrepreneur\)](https://en.wikipedia.org/wiki/Sean_Ellis_(entrepreneur)))

Conclusion

A company's journey towards a long-term vision has numerous challenges, each presenting an opportunity for growth and progress. By identifying, prioritizing, and methodically addressing these challenges, companies can ensure a steady advance toward their envisioned future. This strategic approach brings clarity and direction to the journey and fosters a culture of continuous improvement and resilience against unforeseen obstacles.

Activity 3 - Define Success: Outcomes and Indicators

Defining success for each challenge your company faces in achieving the long-term vision is critical for maintaining direction and motivation. Measurable outcomes provide clear targets and enable your team to gauge progress and adjust strategies as necessary. Here's how to define success and identify other measures that indicate you're on the right track.

Set Clear, Measurable Outcomes

Define success in quantifiable terms for every challenge - the "are we there yet metric."

The format for outcome and success metrics is as follows:

Success is when we see [measurable outcome metric] move from [initial value] to [target value] by [date].

A well-defined metric for success might look like this: "Success is when we see our customer satisfaction score move from 75% to 90% by the end of Q4 2024."

The success outcome metric should be customer-facing. It is a pure measure of whether the challenge faced caused a change in the customer. Internally, other metrics might increase the confidence that an outcome is coming true, but that comes next. Keep the outcome metric customer-facing.

Setting Initial and Target Values

Clearly outline where you currently stand with each metric (initial value) and where you aim to be (target value). This gap between the initial and target values represents the tangible outcome your team needs to achieve. These values must be grounded in reality, based on your company's capabilities and industry benchmarks. You may not be presently measuring the outcome metric. Resist changing the outcome metric to a measure you currently track because it's easier. Doing this dilutes the success metric and might make it appear progress towards a vision is made when it hasn't.

Set Believable Timeframes

Associate each measurable outcome with a specific deadline. Timeframes create a sense of urgency and help prioritize efforts. They also facilitate tracking progress over time, enabling your team to stay aligned with the overarching timeline for achieving the long-term vision. Ask people

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if the timeframe is realistic. If people don't believe it's achievable by the given date, the motivator becomes a detractor (why try?).

Establish Leading Indicators

In addition to the primary metric for success, identify a few faster-moving measures that can indicate early progress or predict future success. These leading indicators might include increased website traffic, higher engagement rates on social media, or an uptick in product demo requests. Although they may not directly measure the outcome, leading indicators provide early feedback on whether your strategies are moving in the right direction.

The outcome measure must directly correlate to the challenge's success. Leading indicators must be believable in their causative and correlated effect on that outcome metric. They can be internal or technical measures. They aim to say, "What we are doing increases the odds we are moving towards success on this challenge."

Without these indicators, the slow-moving outcome success metric doesn't help see early movement to tell if work is moving the needle. These indicators are important for decision-making and adapting the ideas chosen to invest in, but they also somewhat accurately show progress for the ideas we have delivered so far.

A simple challenge, outcome, and leading indicator example is:

Challenge: **Increasing Market Share**

Outcome Success Metric: **"Success is when we see our market share in the renewable energy sector move from 10% to 20% by Q2 2025."**

Leading Indicator: An increase in **inquiries about our renewable energy products, aiming for a 50% increase in inquiries by Q4 2024** as an early sign of growing market interest.

In this example, there is speculation that an increase in inquiries will indicate a higher probability that this company's market share will grow. The difference between outcome and leading indicators is exactly that speculation that the leading indicator at all correlates to the outcome. The outcome measure should be the "MOST" correlated metric to the challenge.

Example Outcome and Leading Indicator Metrics

When dealing with customer-facing outcome measurements for a business challenge, defining the outcome measurements (what you ultimately want to achieve) and the leading indicators (early signs that you're on the right track) is essential. Here are some examples based on a hypothetical challenge of improving customer satisfaction in a service-oriented business:

Outcome Metric: Increase in Customer Satisfaction Scores

Leading Indicators:

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1. Average Response Time to Customer Inquiries: Shorter response times often correlate with higher satisfaction, as customers appreciate quick support.
2. First Contact Resolution Rate: The percentage of customer issues resolved on the first interaction, indicating efficient and effective customer service.

Outcome Metric: Growth in Customer Retention Rates

Leading Indicators:

1. Repeat Purchase Rate: The frequency at which customers return to make additional purchases can indicate growing loyalty.
2. Engagement with Email Campaigns: Increased open and click-through rates in emails can demonstrate heightened interest and engagement, often preceding retention.

Outcome Metric: Improvement in Net Promoter Score (NPS)

Leading Indicators:

1. Customer Effort Score (CES): A lower effort score (i.e., easier experiences) can precede higher NPS, as easier experiences will likely lead to higher recommendation rates.
2. Social Media Positive Feedback: Increased positive mentions and recommendations on social platforms can signal that more customers are becoming promoters.

Outcome Metric: Increase in Average Order Value (AOV)

Leading Indicators:

1. Upsell/Cross-sell Success Rate: Higher rates of successful upsells or cross-sells can lead to increases in AOV.
2. Customer Browsing Time on Site: Longer browsing sessions may indicate increased interest in products, which can correlate with higher spending per order.

Outcome Metric: Reduction in Customer Churn Rate

Leading Indicators:

1. Customer Service Interaction Satisfaction: Positive feedback from service interactions can indicate fewer reasons for customers to leave.
2. Usage Frequency of the Product/Service: Increased frequency in usage can be a good sign that customers find value in the offering, potentially reducing churn.

These leading indicators provide actionable data points businesses can monitor to assess whether their strategies to improve the specified outcome metrics are effective. Companies can make proactive adjustments to enhance customer experiences and achieve better results by focusing on these indicators.

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This approach clarifies expectations and provides a roadmap for achieving meaningful, measurable outcomes. By clearly defining success for each challenge and identifying early indicators of progress, your company can ensure that it remains focused and adaptable in its journey toward its long-term vision.

Traditional Annual OKR and KPI Perils

There are two traditional ways companies try to put a quantitative tool in place to track progress and performance across organizations: OKRs and KPIs.

The biggest problem with company-wide annual OKR and KPI setting is the competitive landscape it causes within the organization. When individual groups or product teams become driven by OKRs and KPIs that conflict with each other, it fosters an environment of competition rather than collaboration. Teams may pursue their targets in ways that conflict with or hinder other parts of the organization, leading to inefficiencies and a dilution of collective effort. The desire to meet department-specific targets can lead to resource hoarding, where teams prioritize their own needs over the company's greater good, creating bottlenecks, slowing innovation, and sowing discord among teams.

When companies roll out OKR (Objectives and Key Results) and KPI (Key Performance Indicators), several other things can go wrong, including:

OKRs:

1. Overly ambitious objectives: Setting unrealistic goals that teams cannot achieve, leading to discouragement.
2. Too many objectives: Spreading focus too thin, causing confusion and prioritization challenges.
3. Poorly defined objectives: Unclear or vague goals that are difficult to measure or achieve.
4. Lack of alignment: Objectives that do not align with company strategy or goals.
5. Inadequate training and support: Insufficient guidance and resources for teams to successfully implement OKR.
6. Overemphasis on output over outcome: Focusing too much on tasks rather than actual results.
7. Unrealistic timelines: Setting deadlines that are too aggressive or unachievable.

KPIs:

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1. Measuring the wrong things: Tracking metrics that do not accurately reflect progress or success.
2. Too many KPIs: Overwhelming teams with too many metrics to track, leading to confusion and focus issues.
3. Unrealistic targets: Setting KPI targets that are too high or unachievable.
4. Lack of context: Company's don't consider any external factors and their impact on KPI performance
5. Inconsistent measurement: Using different methods to track KPIs leads to inaccurate comparisons.
6. Focusing on vanity metrics: Tracking metrics that look good but do not drive meaningful business outcomes.
7. Not adjusting KPIs as needed: Failing to update or remove KPIs as business goals and strategies change.

We can categorize these common mistakes:

1. Not aligning OKR and KPI: Failing to connect objectives with key performance indicators.
2. Not involving teams: Not engaging teams in the OKR and KPI setting process, leading to a lack of ownership.
3. Not regularly reviewing and adjusting: Not assessing progress and making adjustments as needed.
4. Not communicating effectively: Not communicating OKR and KPI goals, progress, and changes to all stakeholders.

CASe addresses these common mistakes in the following ways:

1. **OKRs and KPIs are always attached to the challenge they are measuring.** The OKR or KPI needs to be visually near the challenge and outcome it is measuring. If OKRs and KPIs are shown without the context of “why” people will have a hard time understanding the urgency of moving those metrics.
2. **Long-term outcome metrics and leading indicators are specifically separated,** and wider team members use the outcome metric as a challenge to find faster-moving measures. If leadership passes down all metrics to the team members, then longer-term measures predominate, giving teams no way to adapt strategy and ideas if (when) they don't move in any direction.

- 3. Outcome measures and Leading Indicators are visually shown with challenges**, and alerts are shown when the measured current value becomes stale to indicate “you are running blind.” This visual representation of the outcome, right next to the challenge and vision it is monitoring, makes it clear why that measure is important and why there is value in keeping it updated.

Aligning OKRs and KPIs with the company’s long-term vision and immediate strategic challenges is critical for maintaining focus, fostering collaboration, and ensuring strategic coherence. By doing so, organizations can avoid the pitfalls of misalignment and create a more agile, unified, and motivated workforce committed to achieving shared success.

Activity 4: Idea Generation

After laying the groundwork by identifying challenges and establishing success criteria, the next pivotal step is generating actionable and innovative ideas to tackle these challenges. This ideation phase is crucial and should leverage insights from as broad an audience as possible to ensure a rich diversity of perspectives and solutions. Here’s how to effectively engage a wide audience in the idea-generation process and explore new avenues for overcoming obstacles.

Engaging a Broad Audience for Idea Generation

Annual strategy often leads to annual roadmaps. If you are going to tell your teams what they are doing for the next 12 months, why bother hiring smart people? Many people, especially those working closest with your current systems, know limitations and opportunities that aren’t widely known. Passing down a roadmap from leadership or product management sometimes creates a suboptimal set of ideas, both from a feasibility and an innovation perspective.

Leverage Internal Expertise

- **Technology and Operational Insights:** Start by tapping into your organization’s wealth of knowledge. Employees with direct experience in your company’s technology stack, operations, and customer service are invaluable sources of realistic, actionable ideas. They understand the practical limitations and capabilities of current technologies and processes and can identify areas ripe for innovation.
- **Cross-functional Workshops:** Organize cross-functional brainstorming sessions that bring together diverse teams from technology, marketing, sales, customer service, and other relevant departments. These workshops encourage the sharing of different perspectives and can lead to the synthesis of entirely new solutions.
- **ASK them by Surveys, email, or Slack/Teams:** Challenge the staff to solve challenges. Crowdsource these ideas through rapid and public discourse. Have a challenge of the week discussion channel where challenges can be posted and discussed for a limited time. People will contribute as and when they can in an informal way.

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Incorporate External Perspectives

- **Customer Feedback:** Direct feedback from customers can provide insights into what is truly valuable to them, highlighting areas for improvement or innovation that internal teams might overlook. Use surveys, focus groups, or customer interviews to gather this feedback.
- **Industry Benchmarks and Trends:** For inspiration, look to industry benchmarks, reports, and emerging trends. What technologies or processes are gaining traction in your field? How are leading companies addressing similar challenges?

Generating actionable ideas to overcome strategic challenges requires an inclusive approach, leveraging internal expertise and external perspectives. By fostering a culture of innovation and maintaining an open mind, companies can discover new ways to advance toward their long-term vision, ensuring they remain competitive and responsive to the changing needs of their customers and the market.

Timebound the Initial Idea Generation

Rather than once a year, the goal is continuous ideation for challenge-solving. If there is a significant and high-urgency challenge with no current ideas, then no progress will be possible for that challenge, and success is no closer tomorrow, next month, or next year. Leadership must create urgency for major challenges that currently have no ideas, and setting a timeframe to encourage solutions helps.

The goal of setting a time limit on initial idea generation is not to cut off discussion; it's to help focus thinking on a particular challenge that is currently lacking actionable ideas.

Sometimes, ideas help people see alternatives. Consider including a “less ideal” idea in the discussion to spur deeper thinking. As people critique a bad idea, they describe the traits of a better one.

Too many ideas?

Annual strategy planning is often very time consuming and detail oriented. More ideas to analyze means more effort. This often mutes the ideas chosen to analyze prematurely to reduce the effort and load on teams who analyze and provide the necessary details for planning. CASE avoids this trap. By spreading the load over the entire year, more ideas can be explored to solve each challenge.

CASE encourages progressive elaboration of the idea content. It starts by asking for just a few sentence description of an idea, just enough to prioritize and triage. Once it's selected, a little more information is needed about size and what teams are needed, but this will be for just a few ideas not the entire company brainstorming.

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It's crucial to keep the flow of new ideas uninterrupted at any stage of the CASE process. Adaptability is key to ongoing strategic evolution, and the implementation of ideas is vital for generating the feedback needed to foster further innovation and improvement.

Activity 5: Idea Triage and Selection

When an identified challenge needs more or faster progress toward a successful outcome, we must act on the ideas generated. This includes both the initial ideas and new ones developed by responding to feedback and the lessons learned during implementation. The next step is to carefully triage and select the one or two ideas that hold the most promise.

This selection process involves a nuanced evaluation of potential impact, the confidence in achieving that impact, and the effort required to realize the idea. Additionally, it's essential to consider the organization's capacity constraints, even though this may limit the scope of what teams can pursue right now.

CASE proposes that this triage and selection isn't an annual process but a near just-in-time process. When performed annually, no account can be made for feedback and new ideas. There is no need to plan commitment to the delivery of ideas until there is capacity and a need to do so. By delaying this commitment, more information is known and available to make an informed choice. Keep all options open until you need to make a decision.

Rapid Triage Process (ICE)

We can use the same method for prioritizing ideas that we used to prioritize challenges for investment. As a recap, we use the ICE (impact, confidence, and effort) subjective inputs to sort the ideas into different groups.

The general form of priority for an idea is:

“Achieving this idea has [low, medium or high] **outcome impact**,

and we have [low, medium, or high] **confidence** that it is achievable

with [low, medium, or high] **effort**.

We aren't looking for perfect rank ordering. Given the brevity of the idea, that would be unattainable without a lot of detailed planning. Instead, we are looking to reduce the 25 ideas to the top one or two with some group consensus. The impact, confidence, and effort values are set relative to the other ideas being discussed.

When facilitating triaging and idea selection in group settings, here is a list of non-leading questions that can help guide your teams:

Impact

- What is the potential change or benefit this idea will bring to our outcome and leading indicator metrics?

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- How does this idea align with our long-term vision?
- Can this idea potentially open up other ideas, opportunities, or markets?
- Does this idea solve the challenge for all customers or just a subset?
- Who are the primary beneficiaries of this idea, and how significant is the effect on them?
- What could be the potential downside if this idea fails to deliver the expected outcomes?

Confidence

- How predictable are the outcomes associated with this idea?
- How quickly would we expect to see outcomes from this idea?
- Do we have past experiences or data that support the feasibility of this idea?
- Are there external factors or dependencies that could influence our success? How controllable are they?

Effort

- What teams and skills are required to execute this idea?
- How much invention is needed to make this idea come true? Do we understand what is needed?
- Do we have the necessary in-house skills and expertise to implement this idea, or would we need to outsource?
- How does this idea fit with our current workload and priorities?
- What are the major steps or milestones involved in implementing this idea?
- Is there any potential for scaling up the effort if the initial implementation is successful?

By asking these questions, you facilitate a comprehensive discussion that can help your team thoroughly evaluate each idea against the key criteria of Impact, Confidence, and Effort, guiding them toward a consensus on how to rank each idea appropriately.

Idea Selection

The goal is to be continuously ready to select an idea and move it into the development or “do” pipeline. Until this point, the more ideas, the merrier, but that stops here. Too many ideas in progress simultaneously will cause complete traffic jams in the workflow. Teams will be overwhelmed. Starting too many ideas at once leads to Congestion Collapse; Too much work in a system (cars on the road, shoppers wanting to checkout, web servers selling Taylor Swift tickets), and causes exponential growth in the waiting time for a “service.” We need to avoid

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this, and much of that happens in the next activity (Plan and Coordinate), but it all starts by selecting just the most urgent and likely to succeed ideas.

The abovementioned ICE method separates the work into multiple value-versus-impact buckets. Often, there are still several viable candidate ideas vying for one spot. Before the final decision, a group often needs to pick one. Here is some general advice when working with groups on this final selection:

1. If two ideas are generally equal, take the one that involves fewer teams (fewer dependencies).
2. If two ideas generally have the same impact and confidence, take the one with the least effort.
3. If two ideas generally have the same impact and effort, take the one with the highest confidence.
4. If one idea is only going to be excluded due to the effort, suggest splitting that idea into smaller ideas and seeing if something smaller can obtain most of the value.

If the triage process is done well, this final idea selection will be fast and agreed upon. If there is significant discussion at this level, something (more likely someone) wasn't participating in the original triage process.

Activity 6: Plan and Coordinate

Once an idea is selected, a more detailed analysis is needed before teams start it. CASE intentionally limits the planning of ideas until this point to reduce doing work that isn't necessary. Depending on how many teams need to be involved in delivering this idea changes how much planning and coordination is needed.

The following steps are required to properly plan and understand the idea and get it started.

Define the high-level “Work” that the teams need to do.

It's essential to outline what teams need to accomplish at a high level, focusing on the broader scope rather than detailed tasks. This clarity helps in understanding how an idea will be realized. Early in the process, it's crucial to determine whether a single team can execute the idea independently or if multiple teams must coordinate their efforts. Typically, the complexity of a project increases exponentially with the number of teams involved.

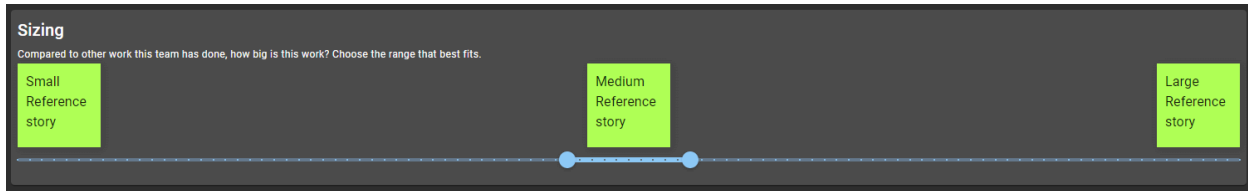
Estimate the size of that work at a high level.

Detailed estimates are not required at this stage. Instead, high-level estimates, whether in terms of time or another metric used by teams to gauge capacity, are sufficient for planning the

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duration and resources needed for each team. There are various methods for making these estimates, including using size categories like small, medium, and large (often referred to as T-shirt sizes), or measuring in days or weeks. Alternatively, teams might use synthetic units, such as story points in software development, which are relative units based on the team's experience with similar tasks.

CASE recommends a technique called reference class forecasting. In this process, the size of this item is compared to other items that the team has previously delivered. It shows examples of prior work and asks, “Where do you think this item fits?”



CASE also recommends estimating size as a range rather than a single value. A range allows teams and team members who disagree to pick a range and move on.

The science behind reference class forecasting is significant. It avoids optimism bias by calibrating team members to examples of the past, and the range estimate helps forecasting by showing the uncertainty that existed when this size estimate was created (avoiding any illusion of precision with such minimal information). Reference class forecasting is also quick and low-effort.

Determine the Sequence of Team Tasks (Task Dependency)

For some projects, the work performed by teams must be sequenced. This involves identifying any dependencies where one team cannot begin their tasks until another has completed theirs. Although many product development organizations prefer to avoid strict sequencing—using strategies like employing mock data for software development or creating 3D printed prototypes in physical product development—sometimes a specific order is unavoidable.

For most complex ideas, however, a strict sequence remains. This sequence dictates when downstream teams can start work based on a prerequisite task being completed. The purpose of this activity is to manage such coordination effectively.

In addition to the coordination overhead they require, understanding these dependencies will be necessary for teams to forecast accurately. If teams can work in parallel, an organization will be able to deliver an idea sooner. If each team has to wait until the prior team(s) have delivered, the idea will take longer. This coordination activity aims to manage this complexity and deliver using the right mix of parallel and sequential starting of work.

Decide when each team starts work (coordination)

A few factors collide when choosing what teams should start next when they have capacity-

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1. Have all the prior sequence task dependencies been delivered?
 - If there are uncompleted prerequisite tasks, working on this idea for this team makes no sense. Unless this team can help the other teams deliver, this team should start something else.
2. Is there anything more urgent (unrelated to this idea) that a team should do first?
 - Working on this idea competes for the same team resources as other ideas. If some other idea is of higher urgency or priority, this team should start that other work.
3. Does the team have the capacity to start this work?
 - Seems obvious, but a team hasn't started work when that team is busy elsewhere. Setting the work status to "in progress" for a team that hasn't started that work prematurely commits capacity to this work when something more urgent may arise. A decision to start work must only happen when the team can do that work.
4. Is there anything that would immediately delay this work if it started?
 - If teams need outstanding items, questions, information, data, material, etc., before they can deliver this work, wait until you have those things before starting it, only to have it sitting idle.
5. Can the team do this work by itself, or does it require the coordination of and participation of other teams? Work that can be solely delivered by this team is much lower risk than work requiring multiple team coordination.

Summary

Planning and coordinating when teams will start work is a critical step in effective delivery. This activity aims to have the right teams start the right work at the right time. It is about what to start, when, and why. It is one of the most important and overlooked parts of delivery.

Activity 7: Build and/or Deliver

This activity involves taking the selected ideas and having teams build and/or deliver the product or service to their intended recipients. Our method is designed to be flexible, accommodating a diverse range of businesses, products, and services, each with unique ways of building and delivering. Although we provide minimal specific guidance in this area, we offer strategic advice that enhances the efficiency and effectiveness of your process across various activities. Here are some tips to support a continuous adaptive strategy:

- Smaller ideas allow for quicker delivery and faster feedback, which enables faster adapting to occur. Prioritize smaller ideas to accelerate feedback.

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- Limit the ideas selected and start to create focus and avoid excessive team task switching.
- Expedite work and ideas rarely. Asking a team to intentionally suspend what they are doing to do something more urgent needs to warrant the disruption it causes. Where possible, make the expedited work the NEXT thing teams do.
- Continuously ask teams to suggest better ideas or ways to split one idea into multiple smaller ideas. This increases the chance that at least some of those ideas will be delivered in a time crunch.

Whatever process you use now is acceptable. Over time, CASE aims to refine these processes, tailoring them to better align with the specific demands of the ideas your strategy seeks to implement. By systematically incorporating data and feedback into your procedures, we can expedite the build and delivery activity. A crucial aspect of this improvement involves identifying bottlenecks and addressing delays, which often provide valuable insights for enhancing efficiency and responsiveness.

Activity 8: Handle Delays

The essence of our continuous adaptation strategy is to enhance the pace of delivery and adaptation loops. Especially when design and development relies on many teams and people to coordinate their work, delays play havoc with momentum. Delays due to dependencies even when small upfront, cause cascading delays further downstream - delivering late means more likely that subsequent steps deliver later again (for example, teams move onto other work limiting their availability for the originally planned work). It cannot be stressed enough how impactful even small delays are on delivery predictability.

Delays are also a signal that there is room for improvement in the delivery system as a whole. If we listen to the causes of delays, it's a pretty good bet that those squeaky wheels point directly where improvements would have the most benefit.

The goal is to swiftly address any issues, questions, or obstacles. The quicker we identify and resolve these blockages, the faster we proceed. Addressing delays offers two major benefits:

1. Immediate Resolution: Knowing who/what is causing the delay allows for quicker resolution.
2. Data Analysis: Understanding what is causing delays helps us adapt our processes to prevent similar issues in the future.

Though it may seem counterintuitive, capturing delays is beneficial as it helps us improve our processes and prevent future problems. By analyzing real-time data on delays, we can identify whether issues are due to missed dependencies, slow response times, or lack of capacity or skills within the team. This analysis helps us adapt our organization to avoid these bottlenecks.

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Delays within a team are often handled promptly by that team. Delays from outside the team or, worse, outside the company are often the causes of major time loss. Often, this is caused by a lack of communication, such as “You are blocking me” and a lack of clear urgency that “doesn’t seem urgent to me.” Whatever process you use, fixing these delays will improve delivery speed. CASE calls handling delays to make it an activity equal to others. The faster delays are communicated and handled, the faster a complete idea will be delivered by all teams. By classifying the causes of those delays, teams can improve the delivery system (adapt) to avoid similar delays in the future.

Some tips about handling delays we have are -

1. Find ways to ensure the delaying teams “know” they are delaying work.
2. Find a way to universally apply an urgency scale to delays. For example, use simple agreed terms like impacting customers, impacting major releases, addressing security issues, etc.
3. Have the teams discuss the root causes and ways to avoid them regularly.
4. As work types change, different types of delays occur. For example, if you move from mainframe to hosted cloud-based product types, expect that new types of delays will emerge.

Quantifying Delays

The data around delays is a goldmine for improvement. To make sense of the delays it is important to quantify their impact, not just their frequency. The suggested approach is to use three factors (the RFI triad):

1. Recency: How recent was the root cause of this delay felt?
2. Frequency: How often does the root cause of this delay occur?
3. Impact: When they do occur, how many days are lost on average?

This RFI triad, allows us to correctly understand the true cost of delays. The simplest way to gather this data is to keep a list of delays (blockers, impediments, waiting for teams, etc) in a list form, with the date they opened, the date they were resolved and some root cause of the delay. To then perform analysis on these root causes, we can limit the time window to the recent three months (as an example), count how often each root cause occurred for frequency, and sum the duration (date resolved - date opened) for each instance.

The gold standard is to go after the root causes based on the Impact (total sum days lost for a root cause) and the root cause that happens most frequently. The most impactful should be the target, but also the most frequent is worth dealing with (most often they are the same causes).

Activity 9: Seek Feedback

After delivering a project, gathering feedback is a crucial step that ensures the continuous improvement and success of current and future initiatives. Organizations must collect feedback from various stakeholders, each offering unique perspectives on different aspects of the project.

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Here's how feedback from customers, the development team, and sales and marketing teams plays a vital role in the adaptation and evolution of your strategy and delivery loops:

- **Informed Decision-Making:** Collating and analyzing feedback from these varied sources allows decision-makers to comprehensively evaluate the impact of the idea and solution. This informed perspective is crucial for determining the next steps.
- **Prioritizing Future Ideas:** Feedback helps identify and prioritize areas for improvement or expansion. It ensures that teams align subsequent ideas with user needs and market demands.
- **Enhancing Collaboration:** Sharing feedback among different teams fosters a culture of transparency and collaboration. It encourages a unified approach to addressing challenges and seizing opportunities for improvement.
- **Continuous Learning:** Every delivered idea provides a learning opportunity. Feedback is a key mechanism for capturing lessons learned, applying them to future projects, and continuously refining processes and strategies. As the development team implements one feature, they better understand what is and isn't easy or possible.
- **Organizational Design improvements:** As ideas change, so do the skills and competencies needed to deliver those skills. Feedback on what types of skills were absent or limited helps design an organization that is a better fit for delivering ideas in the future.

Feedback from Customers

Hearing from your customers directly about a delivered feature is the surest way to confirm hypotheses and assumptions. Typically, this is an interview, call, or survey. The types of feedback sought are generally:

- **Problem Resolution:** Customer feedback assesses whether the project's deliverables effectively solve their problems or meet their need, the ultimate test of the success of delivered ideas.
- **Enhancements and Expectations:** Customers can provide insights into additional features or improvements that could make the solution delivered even more valuable to them, helping prioritize future development efforts.

The purpose of this feedback in CASE is to adapt. Does this feedback change the priority of other ideas? Does it create new ideas? Does it say we are solving the right challenges? The faster teams incorporate this feedback into the continuous planning cycle, the faster this feedback has an impact. Yearly is too long to learn and adapt to customer feedback.

Some non-leading questions to ask customers for feedback are:

1. **What was your initial impression of [feature/idea/service]?** This open-ended question helps capture the customer's first reaction, which can indicate their overall experience.

2. **How does [feature/idea/service] fit into your daily routine or workflow?** Understanding how the feature integrates into a customer's regular activities can provide insights into its usability and relevance.
3. **Can you describe a recent time you used [feature/idea/service]?** Asking for specific instances can yield more detailed and actionable feedback than general questions.
4. **What problem does [feature/idea/service] solve for you?** This helps clarify the feature's perceived value and effectiveness from the customer's perspective.
5. **What is the one thing you would change about [feature/idea/service]?** Encouraging critique may reveal opportunities for improvement or adjustments that might enhance the customer experience.
6. **How easy or difficult was it to start using [feature/idea/service]?** This question assesses the learning curve associated with the feature and can help identify areas where additional support or simplification is needed.
7. **What feature do you find most valuable, and why?** Identifying the most appreciated aspects can guide future development priorities and marketing strategies.
8. **Is there anything about [feature/idea/service] that was confusing or frustrating?** Directly addressing potential negatives can help make necessary modifications to improve the user experience.
9. **Would you recommend [feature/idea/service] to others? Why or why not?** Gauges overall customer satisfaction and can also hint at the feature's strengths and weaknesses through the reasons for the recommendation (or lack thereof).
10. **Do you feel this feature aligns with what you need and expect from our product/service?** This question helps determine if the feature is in sync with the customer's needs and expectations of the brand.

Feedback from Delivery Teams

As the delivery teams deliver, they learn. The faster you incorporate the lessons, only delivery teaches back into the strategy, adapt, and delivery loops, the faster you can cycle. What was harder than expected? What was easier than expected? What skills held us back? How would we do it again now that we understand the final solution? All of these questions help refine the organization so that it can deliver ideas in the future with less effort, stress, and time.

Organizations can gain feedback by asking the teams by survey or after action (retrospectively) to discuss lessons learned.

Some non-leading questions to ask the teams are:

When seeking feedback from product development teams after delivering a feature, idea, or service, it's essential to ask questions that promote reflection and continuous improvement. Here are some thoughtful questions that can help guide this process:

1. **What were the key objectives for this feature/idea/service, and do you feel they were achieved?** This question helps assess whether the development efforts are aligned with the goals and encourages the team to consider the effectiveness of their work.

2. **What were your biggest challenges in delivering this feature/idea/service?** Understanding obstacles can help identify areas where processes might be streamlined, or additional resources might be needed in future projects.
3. **Were any assumptions made during the development process that turned out to be incorrect?** Identifying incorrect assumptions can provide valuable lessons that prevent future mistakes and encourage more thorough analysis upfront.
4. **If you could start over, what would you do differently in delivering this work?** Reflecting on alternative approaches encourages learning from experience and can lead to more effective strategies in subsequent projects.
5. **What tools or technologies did you find most effective during this work? Are there any tools you wish you had?** Discussing the tools and technologies can highlight the need for future investments in better resources or training.
6. **How was the collaboration between different team members and teams?** Feedback on teamwork and cross-team cooperation can improve communication strategies and integration efforts for future work.
7. **What parts of the current process worked well, and which could be improved?** This encourages a critical look at existing processes and can lead to targeted improvements that make future work more efficient.
8. **How do you think this project has impacted your professional growth or development?** Understanding personal development helps motivate team members and can guide decisions on training and career progression within the company.

Summary

Feedback is not just about evaluating past performance; it's a strategic tool for adaptation and growth. By systematically gathering and acting on feedback from customers, development teams, and sales and marketing teams, organizations can ensure that their projects remain relevant, competitive, and aligned with their target audience's evolving needs. Continuous feedback and adaptation are essential for staying agile in a rapidly changing business environment.

Activity 10: Measure Progress

When leadership and teams created challenges in [Activity 2 - Identify Challenges](#) and [Activity 3 - Define Success](#), they also created outcome measures and indicators. Regularly updating these measurements' current values is the true indicator of progress. There are a couple of confounding issues when measuring progress using these indicators:

1. They move too slowly, and the impact isn't seen as measurable for some time after delivery.
2. Other factors can move those metrics unrelated to your delivered idea or service.

The first issue means that we must wait (often a long period) before the idea gains traction. The second involves a more intentional way of assessing impact.

Design of Experiments

Understanding the effectiveness of our ideas goes beyond simple measurement; it involves thoughtful experiment design. It's important to recognize that correlation does not imply causation. We need to ensure that any observed improvements are not coincidental but truly caused by our actions. This involves careful experimentation and comparison with control groups that did not receive the new feature.

Each idea can affect our metrics differently, depending on how it's rolled out. For example, if we introduce an idea to a small segment of our user base, we shouldn't expect it to impact all users immediately, only those with access to the new idea. This process helps us determine whether the changes in metrics are directly attributable to our interventions or other external factors. For instance, if we observe a significant improvement in customer satisfaction among users who accessed a new feature compared to a control group, we can be more confident that our intervention was successful.

This topic is beyond the scope of this CASE introduction, but there are generally two ways to design proper experiments to understand causation:

1. **Randomized Controlled Trials (RCTs):** Consider using an RCT in which you randomly assign participants to either a control or treatment group. RCTs are the gold standard for determining causality, and they could be as simple as giving access to a set of beta users or using A/B testing software that turns a feature on for a portion of the customers.
2. **Before-and-After Studies:** If RCTs are not feasible, you can compare outcomes before and after the implementation. Ensure that external factors are minimized as much as possible. It can be nearly impossible to isolate all external factors, but knowing and discussing them is a good starting point.

The need for more formality is contextual, depending on the type of product or service you are delivering. We call it out here to ensure leadership and teams discuss measurements and outcomes with the right skepticism. It is easy to take an "improving metric" and allocate credit to your ideas.

It's essential to establish a causal relationship between our deliveries and the observed changes in metrics, but this is not as straightforward as tracking metrics over time; it requires setting up control groups to truly understand the impact of our interventions. By doing so, we can differentiate genuine success from market trends or external factors, ensuring that our strategies are effective and tailored to market needs.

Activity 11: Adapting the Organization and Strategy

Leveraging feedback, measures, and lessons from previous projects is essential for driving future success and organizational growth. As strategy evolves, it becomes crucial to identify and address deficiencies within the organization, from structural design to team composition and skill sets. This adaptive approach not only enhances project delivery but also ensures that the

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right ideas are executed more efficiently. Here's how organizations can integrate past insights into future planning and organizational development.

Add, Remove, and Celebrate Challenges

Are we there yet? When we select ideas to solve a challenge, they sometimes work and achieve the desired outcome. By measuring progress and confirming customer feedback, challenges are in the rearview mirror. Given the constraints in our teams' capacity, moving on to another challenge is prudent. Adapting is about knowing when to stop, not just when to start work. Deliberate the win and move on.

When the company created challenges to solve a vision, incomplete information existed. Often, the initial challenges come from imagination (yours and A.I.). As ideas are delivered, more clarity often arises about the challenges' true nature. Through delivery, we adapt to our challenges by adding or lowering the current list's urgency (including deleting). The goal should always be to incorporate measures and feedback that help find the most urgent challenge between now and the vision.

The three adapting questions teams need to be continuously asked for each vision are -

1. Have we done enough of this challenge to move on? (stop investing)
2. Do we need to change the priority of the remaining challenges?
3. Do we need to add new challenges based on our new information?

Refine and Add Ideas

Delivering teaches. The data captured by measuring progress and seeking feedback must be turned into actionable ideas by teams. This action can be a better understanding of the impact, confidence, and effort required for the remaining challenge-solving ideas. And sometimes, new ideas emerge after understanding a delivered idea's impact. It is absurd to think that an annual strategy and roadmap process could incorporate this information easily into an organizational plan. In many organizations, the original roadmap used for budgeting is adhered to because of the organization's budget. New ideas are only added to "next year's" plan (unless there is a crisis). Plan inertia kills better outcomes.

The three adapting questions teams need to be continuously asked for each challenge are -

1. Do we change the impact, confidence, or effort on the remaining ideas?
2. Do we have any better ideas based on our new information?
3. Do any ideas make no sense and should be deleted?

Improve Organizational Design

Through delivery, another team or reason delayed some team's work. Some teams were the bottleneck. Some types of work were harder or easier than expected. We specifically asked for feedback from the delivery teams, and we now need to adapt our organization to smooth and accelerate delivery in the future. Our goal isn't to solve every constraint in our process

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(dependencies on other teams or skills/capacity within a team); that's impossible. We lessen one constraint, and that surfaces in the next one. Different ideas also stress an organization in different ways; this isn't a one-and-done step in adapting an organizational design. It's continuous.

Changing the teams and how those teams collaborate is hard. It is often easier to keep the teams as they are than to adapt. However, as technology and market shifts happen over time, the current organizational design becomes a limiting factor. CASE emphasizes using data to drive this change. Observing what delays occur and what teams delay other teams gives actionable information about what needs to change in an organization's processes. There is inevitably low-hanging fruit, but often, the skills and capacity needed by an organization to deliver future ideas drift away from the current state. The Adapt Loop aims to see and stem this drift.

Teams should be continuously asked these adapting questions -

1. Are there any skill sets we need to grow competence or capacity?
2. Are there any team-to-team dependencies that occur so often that we may be better at cross-skilling those teams?
3. Is there a better way for teams to collaborate? (based on delay data)

The general themes of these questions are skill gaps, capacity limitations, arbitrary team structures causing needless dependencies, and better ways to operate.

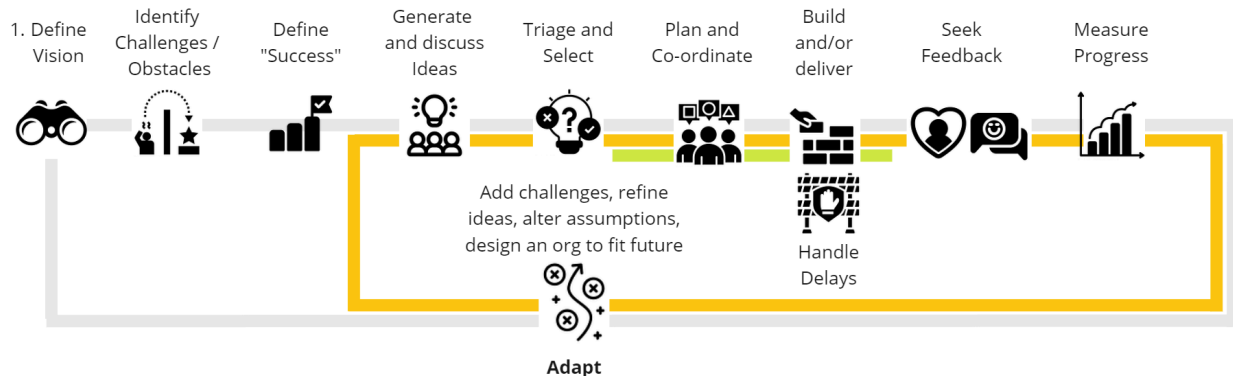
Implementing CASE in your organization

One goal of CASE is to avoid fixed cadence strategy and idea delivery. The three loops and eleven activities ("jobs to be done") already happen in most functioning companies. CASE is attempting to make them obvious, continuous, and successful. The goal is that these loops and activities happen just in time (when needed), on the most urgent challenges first, and in small batches. For example, some challenges will be in the develop and deliver loop, while others will be in the idea generation phase- This is exactly as planned. The problem with annual cycles is that the product teams are working on every challenge at once. Spread the effort over twelve months and prioritize the effort according to priority and urgency (the cost of delaying solving a challenge).

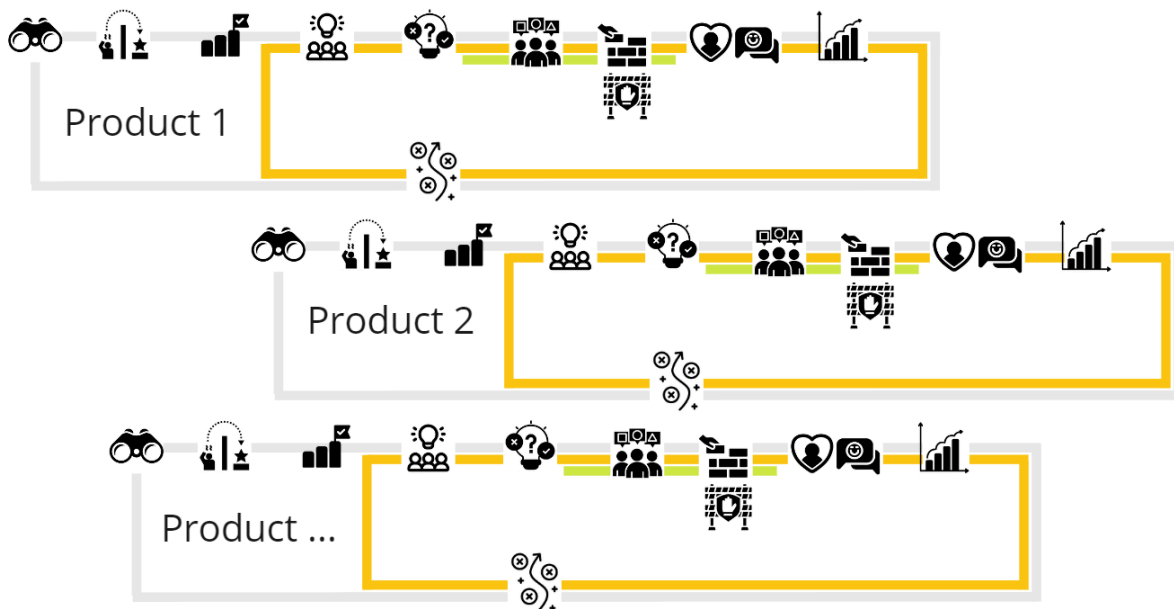
One barrier to implementing CASE is that current work tracking and status tools work against many of the activities described here. If we were to design a tool to support the CASE three-loop model, it wouldn't look like the work tracking tools of today. Every activity we describe comes from what leaders in strategy and product development fields suggest, but the point tools for each job lack coherence in how they work together. Predictability at Scale is attempting to solve this challenge. Starting from this high-level view of "the right way to continuously turn strategy into outcomes," we provide the right help and visualization to pull together this framework. We'd love your feedback on this framework and the support we have for our tool.

Introducing Continuous Adaptive Strategy Execution (CASE)

It would appear as companies (and annual planning exacerbates this) that strategy is simply one linear set of activities (minus the adapt loop that often is forgotten) -



But it is and should be -



Multiple strategic visions (some for the company, some for a product or market) will be ongoing simultaneously, all at different points. CASE encourages this. It also encourages using feedback and measurable outcomes from one vision loop to the others.

CASE doesn't say to throw away anything you currently do; it just elaborates on how to continuously improve and learn by doing it more often and with more focus. It's far less likely to find the right challenges and ideas for every product or service once annually. Smaller focused batches at all activities mean each loop moves faster and accelerates as we incorporate (adapt) new and actual feedback into the process. We are putting the same emphasis on improving our strategy as we are our products, which should be an easy sell.

Where should you start?

Start with an improved vision. Pick a product or service and work with leadership on expressing a vision in the customer-centric form: In x years, y product or service will z. This often is hard for organizations used to expressing strategy as ambitions. Hints will be that the customer isn't in the vision, that it starts with a metric "will grow revenue" or "we have 5% market share" as examples. Coach these leaders away from that by saying, that's a [great] measurable outcome, but we are still on the vision.

From the vision, work with a wider group on outcomes and leading indicators. This often is 80% leadership, 20% product and delivery team mix for the Success Outcome metric, and 100% product and delivery team for the leading indicators. Avoid picking measures just because they already exist.

Brainstorm and collect challenges based on the vision and outcome measure. First, confirm that the broader audience believes the vision is possible in the timeframe. It has to be viewed as achievable for any progress to be made. Then, ask for what is between now and that vision. Send a survey, and start a Slack channel. Present at lunchtime technical sessions? Schedule short meetings. You want a good list of challenges.

The hard part is now over. Organizations are good at getting ideas to solve challenges. There are always too many ideas, but with a proper vision and challenge, the ideas will flow thick and fast.

Triage and select one idea on which there is agreement about the impact, confidence, and effort. Just pick 1 for the moment. Get it planned and delivered. Seek feedback and measure the progress using the leading indicator metrics chosen for the challenge.

Most importantly, a meeting and space should be set up to discuss feedback and outcomes. Look for one improvement in challenges, ideas, and organization design (or delay elimination). Adapt. Adapt. Adapt.

Rinse and repeat.