



The Strategy Reference Content

From Strategy Development to Strategy Development & Execution

Based on best practice analysis, research and principles

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Contents

Content Overview of the Reference Content.....	4
Executive Summary.....	5
Description of the Strategy Reference Content	5
Existing Patterns and Reference Content around Strategy Concepts.....	7
The Strategy Ontology	8
Why use the Strategy Reference Content?	8
Strategy related Meta-Objects and the related taxonomy.....	9
Strategy Object(s) - Decomposition	9
Strategy Object(s) – Overview all Strategy related Meta-Objects.....	10
Performance Indicator.....	10
Strategy Objects and their usage in the Strategy Templates.....	12
Way of Thinking around Strategy aspects	14
Usage of Strategy Maps	14
The Strategy Reference Content Architecture & Modelling Rules.....	15
The Strategy Map	15
Way of Working around Strategy aspects.....	16
Usage of Strategy Matrices	16
The Strategy Reference Content Architecture & Modelling Rules.....	16
Strategy-Forces & Drivers Matrix.....	17
Strategy-Vision & Mission Matrix.....	18
Strategy-Goal Matrix.....	19
Strategy-Objectives Matrix	20
Strategy-Report Matrix.....	21
Strategy-Product Matrix	22

Strategy-Service Area/Group Matrix.....	23
Strategy-Process area/group Matrix.....	24
Strategy-Owner Matrix.....	25
Strategy-Stakeholder/Resource Matrix	26
Way of Modelling around Strategy aspects	27
Strategy Decomposition & Composition Model.....	28
Strategy Model.....	28
Way of Implementing.....	29
Roles involved.....	33
Conclusion	34
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Content Overview of the Reference Content

Our Strategy Development & Execution patterns has been packaged into a repeatable concept, and are supported by leading practices, industry practices and best practices reference content. Each standard is a unique set of documented patterns with descriptions, how to guide, decision points, modelling concepts and artefacts that are required to achieve the desired result. Like a recipe, where you can follow a sequence of simple steps to achieve the wished result.

- Disruptive Forces & Trends which influence strategy
- Strategy Development & Execution Capabilities
- Measures/KPIs relevant to strategy
- The use of Strategy techniques
- Strategy & Integrated Planning Model
- Strategy and the relationship to Revenue Model
- The relationship between Strategy and Value Model
- Strategy and the important of rethinking the Service Model
- Strategy and Performance Model
- Strategy relevant to the Cost Model
- How to redirect the Business Model with ones strategy
- Gain insight into an integrated Strategy Framework
- Have a complete set of Strategy Artefacts

The Strategy Reference Content is used to define:

1. **Why:** Understand and capture the motivation or reason for strategy execution needs. This includes the following, but is not limited to:
 - Identify influencing (external or internal) drivers around strategy execution
 - Identify and evaluate potential value drivers around strategy execution
 - Identify and estimate impact of (external or internal) forces around strategy execution
 - Define and align goals with strategy execution
2. **What:** The following steps are the most common in strategy execution:
 - Define the requirements around strategy execution
 - Establish a connection between strategy execution and the overall vision and mission of the enterprise to ensure alignment
 - Define the expected value outcomes of strategy execution
 - Establish a clear and concise connection between strategy execution and products
3. **How:** Manner, method or way of planning for strategy execution:
 - Design and develop an integrated plan for strategy execution
4. **Who:** Capture the persons involved with strategy execution:
 - Establish clear and concise reporting responsibilities for strategy execution
 - Assign accountability and ownership (business, service, process, application, data, platform or infrastructure) around strategy execution
5. **Where:** Location, area or place for where the strategy execution activities takes place:
 - Determine which locations are involved with strategy execution
6. **When:** Timing or time for when strategy execution should take place:
 - Time of beginning, impact, end or consumption of [time] around strategy execution activities

Executive Summary

There is no question that strategy development and Strategy Development & Execution is something successful leaders use as a method to bring about a desired future, such as achievement of a goal or solution to a problem. According to a research published in Harvard Business Review, “companies realize only 40-60% of their strategies” and therefore they are missing out on their real “value potential”. There is clearly a gap between strategy development and Strategy Development & Execution. The research of the Global University Alliance has revealed that outperforming organizations realize that strategy is important because the resources available to achieve these goals are usually limited. While the cost really matters, this is about lost value in terms of missed opportunities and increased competition. Both strategy development as well as execution involves integrated planning, setting goals, determining actions to achieve the goals, and mobilizing resources to execute the actions. In today’s business environment, it’s the early adopters and smart organizations that are succeeding. They are challenging the traditional ways work gets done, identifying the gaps that exist between strategy and execution within their organizations and embracing new leadership approaches with the goal of achieving competitive advantage.

Description of the Strategy Reference Content

Our Strategy reference content has been developed to provide executives with just the right tools to solve different strategic challenges. Regardless of whatever challenges executives are facing, the ambition is clear; to close the gap between defining a strategy, and executing activities to get things done. This includes understanding the many complex interconnections and relationships to showcase how existing - or new strategies within your organization relates to specific accountability levels (ownership), reporting responsibilities, what their goals and requirements are, and what kind of value they are expected to deliver. Similarly, Strategy Development & Execution is also a highly effective instrument to use when you need to describe how external or internal factors such as disruptive trends or global megatrends might impact a strategy. This enables the organization to prepare for dramatic market changes, sudden government regulations or to identify and capture business opportunities that might appear within their respective markets. Some of the most critical focus areas around Strategy Development & Execution that companies in all industries should pay attention to are:

- **Disruptive Forces & Trends:** Understanding the disruptive forces and trends and determine how they might influence the strategy development process as well as how it effects Strategy Development & Execution. This is critical, to avoid missed opportunities, unnecessary resource losses and redundant activities. At the same time, some trends may open up for new business opportunities because of potential shifts in consumer demands, technology or government regulations, etc. Through research and analysis, we have discovered many disruptive forces and trends that influence Strategy Development & Execution in various industries.

- **Strategy:** Needless to say, an organization's strategy is one of the most vital components around Strategy Development & Execution. Defining the right strategy with well defined critical success factors and key performance indicators is the reason for why we employ Strategy Development & Execution to begin with. Without such a clear and concise strategy, there is little use for efficient execution; they must go hand-in-hand. Through research and analysis, we have compiled the most common strategies. This can provide inspiration, give feedback as well as provide a basis for benchmarking yourself.
- **Integrated Planning Model:** The Integrated Planning Model is a crucial part of Strategy Development & Execution, as the planning part of any strategy is to document how to get things done, when to do it and where it should happen. The Integrated Planning Model is a powerful tool to use because it allows for high level planning as well as much more detailed planning, such as putting forth activity steps, resource requirements, timelines, and much more.
- **Revenue Model:** When it comes to Strategy Development & Execution coupled with, for example, a profit or growth strategy, the Revenue Model is a useful instrument to use to document how and where the revenue flows are generated across organizational boundaries. Important components of the Revenue Model includes, but is not limited to:
 - Identify the core competencies that allows the organization to differentiate on the market
 - Identify the core competencies that allows the organization to compete on the market
 - Document revenue flows across the organization
 - Revise or evaluate the service channels of the organization
- **Value Model:** The Value Model is an important tool to be used with Strategy Development & Execution. Some of the components are:
 - Identifying and understanding potential value opportunities
 - Pinpoint the value drivers
 - Setting roles for identifying value concepts to enable profit gain, growth, production efficiency, etc.
 - Map the value offerings scattered in the operating model
 - Adding measures and reporting for continuous value governance
- **Service Model:** Similar to the Value Model, the Service Model is an important component around Strategy Development & Execution. Some of the components that we focus on are:
 - Identify and execute on opportunities for service integration and standardization
 - Maintain continuous support of customer-centric services
 - Monitor and govern service platform channels
 - Identify and innovate the simple, complex and unique services of your organization

- **Performance Model:** The Performance Model is used with Strategy Development & Execution to help the organization focus on key activities such as managing processes, employee workflows and production. Some of the most important components are:
 - Plan for transformation towards operational excellence
 - Identify the performance drivers
 - Optimization of operational efficiency
 - Investing in new and innovate ways of product development
 - Setting measures for production and process governance
- **Cost Model:** The Cost Model is used with Strategy Development & Execution to manage costs, identify potential cost cutting opportunities to lower production costs, and to conserve or eliminate specific sets of resources around each strategy. Key components are such as:
 - Investigate opportunities for potentially lowering overall production costs
 - Identify and manage critical cost flows
 - Set up and conduct timely internal evaluation and audits

Existing Patterns and Reference Content around Strategy Concepts

We have researched and analyzed the patterns around strategy execution and related concepts. Our analysis of outperforming versus underperforming organizations revealed specific patterns for successful outcomes. These patterns have now been documented into sets of repeatable artefacts with step-by-step and hands-on execution templates/models. These artefacts include the strategy map, linking strategy to the operating model and thereby processes. In the following we will illustrate how to link strategy to various business units, locations, roles, owners, KPIs, reports, process as well as information and data objects.

The Strategy Ontology

As a part of the LEADing Practice Strategy Reference Content it provides a strategy ontology with its strategy description, specific strategy semantic relations and correlations. It is based on a collection of best and leading practice around how to work with strategy within enterprise modelling, enterprise engineering and enterprise architecture disciplines. The Strategy Reference Content is therefore an essential part for any practitioner working with and around strategy aspects. It provides a structural way of thinking, working, modelling, implementation and governance around strategy definitions and how strategies are applied within business functions and organizational construct. The Strategy Reference Content also provides an overview of the key strategy aspects of the organisation and how they relate to the various business aspects e.g. forces & driver, goal (business, application, technology), objective, service, process, owner, and stakeholder/resource. The Strategy Reference Content therefore provides a way of analysing, appraising, approximating, assessing and capturing strategy related objects to enable innovation and transformation.

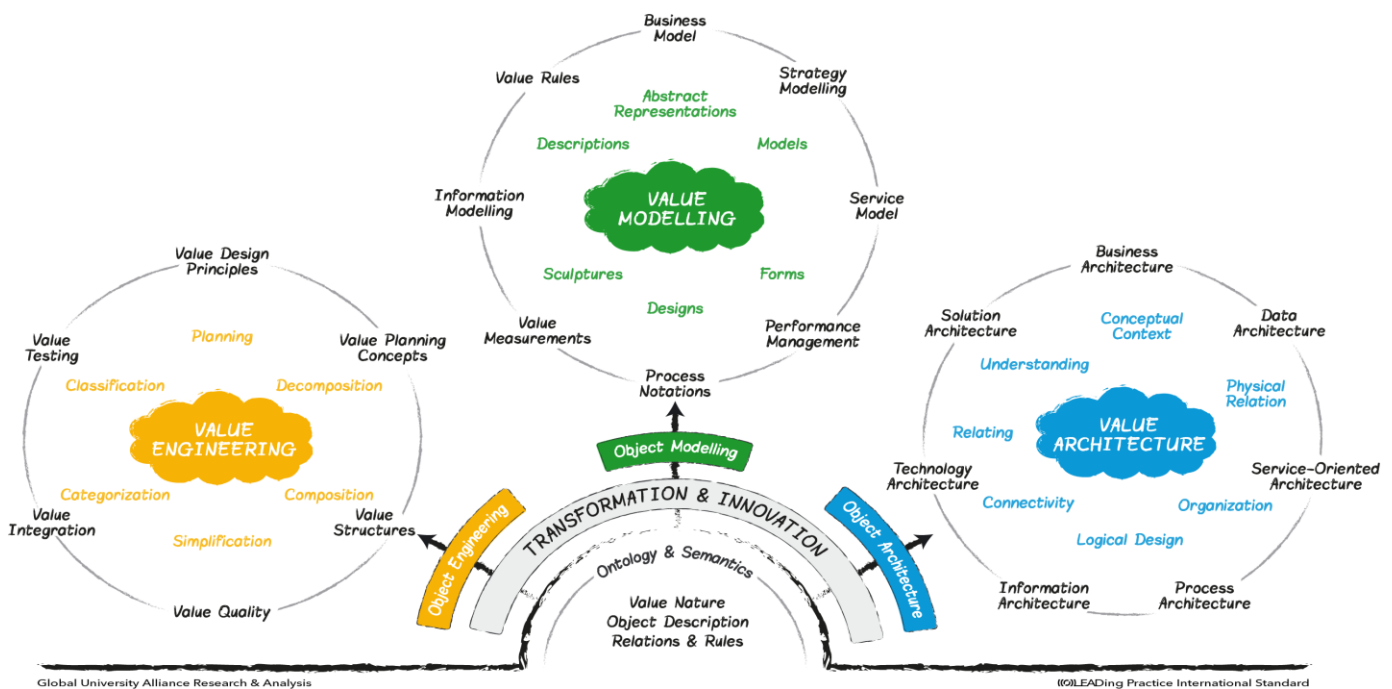


Figure 1: The Strategy Objects are part of the many semantic relations between the enterprise engineering, enterprise modelling, and enterprise architecture enabling transformation and innovation.

Why use the Strategy Reference Content?

- It provides strategy ontology with its specific strategy descriptions, semantic relations and correlations.
- The purpose of the Strategy Reference Content is to define how to organize and structure the viewpoints and objects associated with strategy development and strategy management.

- The Strategy Reference Content serves as guiding principles to establish a common practice for creating, interpreting, analysing and using strategy objects within a particular domain and/or layers of an enterprise or an organization.
- Using the Strategy Reference Content is done through a set of principles e.g. how and where can the strategy objects be related (and where not).
- The Strategy Reference Content is vendor neutral and agnostic and can therefore be used with most existing frameworks, methods and or approaches that have any of the meta-objects mentioned in this document.
- It has a structured repeatable pattern for strategy related objects, structures as well as artefacts (the basis of our standards). The definition of a pattern used here is the description of the repeatable and mostly used/generic specifications and relations of a topic, not all theoretically possible specifications or relations.
- Use a Strategy Standards that increase the level of re-usability and replication.
- It has a fully integrated and standardized strategy maps, matrices and models that allow for advanced ways of thinking, working, modelling, implementation and governance of the strategies.

Strategy related Meta-Objects and the related taxonomy

A **strategy** is the direction and ends that the enterprise seeks, as well as the means and methods by which these ends will be attained. A strategy can have different contexts/types. Within the strategy map and - matrix, we will have the examples where the strategy is considered to be the intentional plan, containing specific statements of goals and strategic directions/actions to gain (or being prepared to gain) a position of advantage over adversaries or best exploiting emerging possibilities.

A strategy is influenced by certain objects and actually directs other object. For example the strategies relate to the Vision and Mission, which describe how in view of the management of the organisation they should be achieved. Strategies can also relate to the external Forces and Drivers (often the 'Why' a strategy exists). On the other hand business owners and stakeholders can also relate to a strategy. Understanding the full relations to and from a strategy, enables the Strategy to become an integrated part of the organisational practice and thereby execution instead an isolated phenomena.

Strategy Object(s) - Decomposition

Strategy can be **decomposed** into the following Objects:

- Objectives: Strategic Business Objectives (SBO's)
- Competencies: Business Area and Group
- Area of execution: Balanced Scorecard, Organizational Construct
- Goal (business, application, technology)

Strategy Object(s) – Overview all Strategy related Meta-Objects

The following LEAD objects are the most relevant to strategy aspects within the Strategy Reference Content and its templates:

Strategy (Strategic Business Objective)	The direction and ends which the enterprise seeks, as well as the means and methods by which these ends will be attained.
Goal (e.g. business, application, technology)	A desired result considered a part of the organizational direction, aims, targets, and aspirations.
Organizational Construct	The components of the organization and how they are assembled.
Forces (external & internal)	An external or internal factor which pushes some aspect of an enterprise in a specific direction.
Drivers (external/internal)	An external or internal factor which influences and pushes some aspect of an enterprise in a specific direction.
Vision	The desired future state of the enterprise, an imagination of the future aspirational state of how the enterprise could or should be like without regard the how this will be achieved.
Mission	The purpose and nature of the enterprise.
Objective (Critical Success Factor)	Time-bounded milestones to measure and gauge the progress towards a strategy or goal.
Object (Business & Information)	A real world thing of use by or which exists within the enterprise and information objects reveal only their interface, which consists of a set of clearly defined relations. In the context of the business competency, the relevant objects are only those which relate to the enterprise's means to act.
Performance Indicator (business) Tier: Strategic, Tactical, or Operational	Any of a series of metrics used by an enterprise, to indicate its overall success or the success of a particular area in which it is engaged.
Value Expectation	The anticipated benefits that are of worth, importance, and significance to a specific stakeholder.
Value Driver	A factor which is based on benefit or merit which pushes some aspect of an enterprise in a specific direction.
Value Proposition	The merit and benefit that a customer, added value partner, or the market itself can obtain from their perspective and point of view.
Business Area	The highest level meaningful grouping of the activities of the enterprise.
Business Group	An aggregation within an enterprise which is within a Business Area.

Business Owner	A role performed by an actor with the rights, rules, competencies, and capabilities to take decisions for the part of enterprise for which stewardship responsibilities have been assigned.
Business Resource/Actor	A specific person, organization internal or external to the enterprise that initiates or interacts with the defined functions and activities. Actors may be internal or external to an organization.
Business Competency	An integrated and holistic set of related knowledge, skills, and abilities, related to a specific set of resources (including persons and organizations) that combined enable the enterprise to act in a particular situation.
Competency Type (Diff, Comp, Non-Core)	The classification of competencies into Core Differentiated Competencies, core competitive competencies or non-core competencies. Sorting the role played by each competency in the creation of value and in the execution of the enterprise's strategy.
Revenue	The realized income of an enterprise or part thereof.
Cost	An amount that has to be paid or given up to obtain the use or access to something.
Service Area	A high level, conceptual, aggregation of provided business services.
Service Group	An aggregation of services based on a common factor or domain which exist within a common service area.
Service Owner	A role performed by an actor with the rights, rules, competencies and capabilities to take decisions for the business service for which accountability has been assigned.
Process Area (categorization)	The highest level of an abstract categorization of processes.
Process Group (categorization)	A categorization and collection of processes into common groups.
Process Owner	A role performed by an actor with the fitting rights, competencies, and capabilities to take decisions to ensure work is performed.
Application Owner	A role performed by an actor with the rights, rules, competencies and capabilities to take decisions for the application for which accountability has been assigned.
Data Owner	A role performed by an actor with the rights, competencies, and capabilities to take decisions about the aspects of data for which stewardship responsibilities have been assigned.
Platform Owner	A role performed by an actor with the fitting rights, competencies, and capabilities to take decisions about the platform devices for which stewardship responsibilities have been assigned.
Infrastructure Owner	A role performed by an actor with the rights, competencies, and capabilities to take decisions about the components within the infrastructure for which stewardship responsibilities have been assigned.

Figure 2: The 31 strategy meta-objects.

Strategy Objects and their usage in the Strategy Templates

The Strategy Reference Content templates consist of both strategy maps, strategy matrices and strategy models that capture the relevant strategy meta-objects. Each of these is based on a specific view, with particular stakeholder concern to enable value identification, creation, and realization in achieving the outlined needs and wants. For this the Strategy Reference Content templates identify the relevant stakeholders, their requirements and concerns. Strategy object descriptions and their modelling and architecture rational, the corresponding rules, architecture views and viewpoints; each of these artefacts are built as templates to support a particular need and want.

Fully integrated and standardized strategy templates enables the strategist, subject matter experts/practitioner or architect (value or business architect) to work with the relevant strategy meta-objects throughout all the architectural layers (business, application and technology). Advanced strategy modelling and relating the relevant objects throughout the layers is one of the strengths of the Strategy Reference Content. Not only are the objects governed by its connection modelling rules, but also how and where the strategy templates interlink and share common objects is defined and standardized. The strategy templates are ether maps, matrices and models.

LEAD Templates & LEAD Meta Object Relations: Strategy specific (*)		Strategy (S)
STRATEGY META-OBJECTS	Forces (<u>external</u> & internal)	2
	Drivers (external & <u>internal</u>)	2
	Vision	2
	Mission	2
	Strategy (Strategic Business Objective)	1,2,3
	Goal (e.g. business, application, etc.)	2,3
	Objective	1,2,3
	Value Indicator (Critical Success Factor)	1,2,3
	Value Driver	2
	Value Expectation	2
	Timing	2,3
	Reporting	2,3
	Business Area	1,2,3
	Business Group	1,2,3
	Location	2
	Product	2
	Cost	
	Revenue	
	Business Owner	2,3
	Service Area	1,2,3
	Service Group	1,2,3
Service Owner	2,3	
Process Area (categorization)	1,2,3	

		Process Group (categorization)	1,2,3
		Process Owner	2,3
		Application/System Owner	2,3
		Data Owner	2,3
		Platform Owner	2,3
		Infrastructure Owner	2,3

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Legenda: 1 = Map 2 = Matrix 3 = Model

(*) For a full overview of the Strategy LEAD Templates & LEAD Meta Object Relations: see Appendix 1.

Figure 3: The strategy and their Maps, Matrices & Models

The maps are often in the form of a list and are a representation of the decomposed strategy objects, while the matrices are the continuity of and interconnection between a map (a representation of decomposed objects) and a representation of interconnected and related objects. Models often show the graphical representation of the relations and connections. The maps, matrices and models are used in the decomposition and composition work within and throughout the layers. The specific templates do not only show which objects are within what template, thereby specifying if it is a map, matrix or model, it furthermore shows where the object of one template can be reused in another template.

Way of Thinking around Strategy aspects

The Way of Thinking around Strategy disciplines is essential, as it is the basis of the guiding principles around the Strategy Reference Content. It provides a structural concept for the value specification around strategy definitions e.g. wants, needs, goals, issues and problems. The way of thinking around working with strategies furthermore postulates about what ought to be, including specifying the right strategy abstraction level. The way of thinking does the following; it analyses, appraises, approximates, assesses and captures all relevant aspects of strategy objects and artefacts; their idea, -design, -plan, -scheme and -structure. This is all done in order to understand the underlying strategy concept, thought, view, vision as well as perspective, philosophy and belief.

The purpose of having a common way of thinking around strategy concepts is to define how to organize and structure the viewpoints and strategy objects associated with the various disciplines e.g. business strategy and IT-strategy, applying the concepts. The strategy reference concept has proven to help companies with some of the most common and complex advanced strategy principles, dilemmas and challenges that companies has to confront today.

This includes, but is not limited to:

- Link strategy to execution.
- Identification of strategy and strategy forces and drivers.
- Mapping of business model domains and which strategy aspects are value creating.
- For decision-making, specify strategy aspects in the measurements and reporting; making sure the strategy is monitored whether it creates the expected results.
- Interlink the strategy aspects to the innovation and transformation programs and projects.

What many organizations do not realize is that there is something common within all the mentioned areas where strategy aspects need to be applied. The common things are the strategy objects. We have through research and analysis identified the semantic relations of the various strategy objects and how they can be applied within different disciplines. The relations of the strategy objects are built into our strategy templates e.g. strategy maps, strategy matrices and or strategy models.

Usage of Strategy Maps

A Strategy Map is an accurate list and representation of the decomposed and/or composed Strategy Objects. The purpose of this map is to identify and decompose a list of all the strategies in the enterprise. This list helps to understand the breadth of functionality provided by the strategies. It will also provide a centralized and official overview of the key strategies in the organisation with their specific strategy area and -group, channel, stakeholder, owner and role/resource (including manager).

The Strategy Reference Content Architecture & Modelling Rules

The strategy map should capture the strategy context, e.g. strategic business objectives, the position in the organisational construct, e.g. enterprise area, business area/group, and how the strategy is to be executed, e.g. their balanced scorecard areas such as customers, finance, processes (operations) and continuous learning.

The Strategy Map

	What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
#			
#			
#			

Figure 4: Strategy with decomposed strategy objects.

The strategy map's capturing should be based on enterprise modelling- and architecture rules and is related to LEAD tasks. Therefore for each individual column of the strategy map their applicable decomposition- (D), primary- (P) and secondary (S) relationship related rules (Rule) as well as the related tasks (Task) are described below:

The 'what' specification in terms of context specification, e.g. strategic business objectives.	
Rules	(P) Strategy relates to Objective (e.g. CSF, Plan, Forecast, Budget)
Tasks	• Identify, classify and organize the strategy of the company (strategic business objectives)
The 'where' specification in terms of which enterprise area, business area and -group.	
Rules	(S) Strategy relates to Business Area and -Group
Tasks	• Identify the business areas and -groups that are affected by the strategic business objectives
The 'how' specification in terms of which balanced scorecard area such as customers, finance, process (operations), services, continuous learning.	
Rules	(S) Strategy relates to Process (Process Area and -Group) (S) Strategy relates to Services (Service Area and -Group)
Tasks	• Identify and classify how the strategy will be realized, which balanced scorecard description of customers (including service), finance, process (operations), and continuous learning.

Figure 5: How strategy is based on rules and relates to LEAD tasks.

Way of Working around Strategy aspects

The Strategy Way of Working is critical discipline of translating both strategic planning and effective execution. It structures the arrangement of effort and work by translating the “Way of Thinking” into a structural way of working. The Way of Working organizes, classifies, aligns, arranges, quantifies, recommends and selects the strategy objects and with it the relevant strategy template in a systemized and categorized way they need to be de-composed (broken down) or composed (related) together.

The Way of Working is where one defines the best suitable technique, manner, routine and method that will help the practitioner to ensure integrity, accuracy and completeness of each particular task related to the rule that ensures the right strategy relation. The strategy way of working is therefore a series of phases with a collection of activities that the user of the strategy methods needs to follow and undertake in order to reach a specific goal/outcome. The below specified way of working therefore structures the practitioner’s techniques in applying the right semantic principles, rules, procedures and practices.

Usage of Strategy Matrices

The Strategy Matrices are a representation that accurately shows the relationship between specific decomposed and composed strategy objects. The core idea of a the strategy matrices is that they consists of the strategy objects that have primary and thereby direct natural relations, these are always in a list form (row and columns) and the strategy objects that need to be related to them. This is seen in the strategy matrices as the cross product between the rows and columns. This allows within the strategy matrix to relate the unfamiliar to the familiar strategy objects in the different layers (composition), which represents the matrix diagram (rows and columns). These ontology and semantic based strategy relations have been standardized to ensure reusability and replication of success in outlining the right connection points that is actually based on a common relationship pattern of the strategy objects.

The Strategy Reference Content Architecture & Modelling Rules

The strategy matrix should capture the strategic business objective, the related forces & drivers, the owner, the objective (such as critical success factor, plan, forecast or budget), and the stakeholder/resources involved. These are captured in separate matrixes as described below.

Strategy-Forces & Drivers Matrix

This matrix shows the columns of the strategy Map in combination with the forces & drivers; why in terms of reason specification, e.g. Forces and Drivers for change.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Force/Driver 1	#			
Force/Driver 2	#			
Force/Driver N	#			

Figure 6: A matrix showing how strategy relates to forces & drivers.

The strategy matrix's capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to forces & drivers:

Forces and drivers: An external or internal factor that pushes some aspect of an enterprise in a specific direction for change.	
Rules	(S) Strategy relates to Forces and Drivers
Tasks	<ul style="list-style-type: none"> Associate and link the strategy (strategic business objectives) to: <ol style="list-style-type: none"> Internal forces, 2. External forces, 3. Internal drivers, 4. External drivers that can affect the business (based on level of impact, severity and/or urgency). Associate and link the where specification of the strategy, e.g. business areas and –groups, to: <ol style="list-style-type: none"> Internal forces, 2. External forces, 3. Internal drivers, 4. External drivers that can affect the their business (based on level of impact, severity and/or urgency). Associate and link the balanced scorecard area (how the strategy should be realized) to: <ol style="list-style-type: none"> Internal forces, 2. External forces, 3. Internal drivers, 4. External drivers that can affect the realization of the strategy (based on level of impact, severity and/or urgency).

Figure 7: A table showing that strategy objects relate to forces & drivers and the tasks associated with it.

Strategy-Vision & Mission Matrix

This matrix shows the columns of the strategy Map in combination with the vision & mission; why in terms of reason specification, e.g. the Vision and Mission behind initiated change programs.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Vision/Mission 1	#			
Vision/Mission 2	#			
Vision/Mission N	#			

Figure 8: A matrix showing how strategy relates to vision & mission.

The strategy matrix's capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to vision & mission:

Vision: The desired future state of the enterprise, an imagination of the future aspirational state of how the enterprise could or should be like without regard the how this will be achieved.	
Mission: The purpose and nature of the enterprise.	
Rules	(S) Strategy relates to Vision and Mission
Tasks	<ul style="list-style-type: none"> • Associate, link and prioritize the strategy (strategic business objectives) of the company to the: 1. Vision of the company, and 2. Mission of the company; • Associate, link and prioritize the where specification of the strategy, e.g. business areas and – groups, to the: 1. Vision of the company, and 2. Mission of the company. • Associate and link the balanced scorecard area (how the strategy should be realized) to to the: 1. Vision of the company, and 2. Mission of the company.

Figure 9: A table showing that strategy objects relate to vision & mission and the tasks associated with it.

Strategy-Goal Matrix

This matrix shows the columns of the strategy map in combination with the goals, the ‘whither’ in terms of business-, application- and technology goals.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Goal 1	#			
Goal 2	#			
Goal N	#			

Figure 10: A matrix showing how strategy relates to goals.

The strategy matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to goals:

Goal (e.g. business, application, technology): A desired result considered a part of the organizational direction, aims, targets, and aspirations.	
Rules	(S) Strategy relates to goals (e.g. business, application, and technology).
Tasks	<ul style="list-style-type: none"> • Associate and relate the strategic business objective to the 1. Business goals, 2. Application goals, and 3. Technology goals. • Associate and relate the business areas /-groups to the 1. Business goals, 2. Application goals, and 3. Technology goals. • Associate and relate the 1. Business goals, 2. Application goals, and 3. Technology goals to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning.

Figure 11: A table showing that strategy objects relate to goal and the tasks associated with it.

Strategy-Objectives Matrix

This matrix shows the columns of the strategy map in combination with the objectives, the 'whither' in terms of objective specification in critical success factors, plans, forecasts, and budgets.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Objective 1	#			
Objective 2	#			
Objective N	#			

Figure 12: A matrix showing how strategy relates to objective.

The strategy matrix's capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to objective:

Objective (Critical Success Factor): The Time-bounded milestones to measure and gauge the progress towards a strategy or goal. 'whither' specification in terms of objective specification, e.g. critical success factor, plan, forecast, budget.	
Rules	(S) Strategy relates to Objective (critical success factor, plan, forecast, and budget).
Tasks	<ul style="list-style-type: none"> • Associate and connect the objectives <ol style="list-style-type: none"> 1. Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting to the strategy of the company • Associate and connect the objectives <ol style="list-style-type: none"> 1. Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting to the strategic business areas and -groups of the company • Associate and connect the objectives <ol style="list-style-type: none"> 1. Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning.

Figure 13: A table showing that strategy objects relate to objective and the tasks associated with it.

Strategy-Report Matrix

This matrix shows the columns of the strategy map in combination with the reports, the ‘what/which’ in terms of which reports are used to report on the strategy and its realisation.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Report 1	#			
Report 2	#			
Report N	#			

Figure 14: A matrix showing how strategy relates to reports.

The strategy matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to reports:

Report: The exposure, description, and portrayal of information, about the status, direction or execution of work within the functions, services, processes, and resources of the enterprise.	
Rules	(S) Strategy relates to reports.
Tasks	<ul style="list-style-type: none"> • Associate and relate the strategic business objective to the reports. • Associate and relate the business areas /-groups to the reports. • Associate and relate the report to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning.

Figure 15: A table showing that strategy objects relate to reports and the tasks associated with it.

Strategy-Product Matrix

This matrix shows the columns of the strategy map in combination with the products, the ‘what/which’ in terms of which products are used to product on the strategy and its realisation.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Product 1	#			
Product 2	#			
Product N	#			

Figure 16: A matrix showing how strategy relates to products.

The strategy matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to products:

Product: A result and output generated by the enterprise. It has a combination of tangible and intangible attributes (features, functions, usage).	
Rules	(S) Strategy relates to products.
Tasks	<ul style="list-style-type: none"> • Associate and relate the strategic business objective to the products. • Associate and relate the business areas /-groups to the products. • Associate and relate the product to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning.

Figure 17: A table showing that strategy objects relate to products and the tasks associated with it.

Strategy-Service Area/Group Matrix

This matrix shows the columns of the strategy map in combination with the service area/groups; the 'where' in terms of which service area/groups are involved in the strategy and its realisation.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Service area/group 1	#			
Service area/group 2	#			
Service area/group N	#			

Figure 18: A matrix showing how strategy relates to service area/group.

The strategy matrix's capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to service areas/groups:

Service area: A high level, conceptual, aggregation of provided business services.	
Service Group: An aggregation of services based on a common factor or domain which exist within a common service area.	
Rules	(S) Strategy relates to service area/group.
Tasks	<ul style="list-style-type: none"> • Associate and relate the strategic business objective to the service area/group. • Associate and relate the business areas /-groups to the service area/group. • Associate and relate the service area/group to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning.

Figure 19: A table showing that strategy objects relate to service area/groups and the tasks associated with it.

Strategy-Process area/group Matrix

This matrix shows the columns of the strategy map in combination with the process area/groups; the 'where' in terms of which process area/groups are involved in the strategy and its realisation.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Process area/group 1	#			
Process area/group 2	#			
Process area/group N	#			

Figure 20: A matrix showing how strategy relates to process area/group.

The strategy matrix's capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to process areas/groups:

Process Area: The highest level of an abstract categorization of processes.	
Process Group: A categorization and collection of processes into common groups.	
Rules	(S) Strategy relates to process area/group.
Tasks	<ul style="list-style-type: none"> • Associate and relate the strategic business objective to the process area/group. • Associate and relate the business areas /-groups to the process area/group. • Associate and relate the process area/group to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning.

Figure 21: A table showing that strategy objects relate to process area/groups and the tasks associated with it.

Strategy-Owner Matrix

This matrix shows the columns of the strategy Map in combination with the owner, the ‘who’ in terms of area of strategy specification: business owner, service owner, process owner, application/system owner, data owner, platform owner, and infrastructure owner.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Owner 1	#			
Owner 2	#			
Owner N	#			

Figure 22: A matrix showing how strategy relates to owner.

The strategy matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to owner:

Owner: A role performed by an actor with the roles, rules, competencies and capabilities to take decisions for the part of the business/service/process/...he or she is responsible for.	
Rules	(S) Strategy relates to Owner.
Tasks	<ul style="list-style-type: none"> • Associate and link each strategic business objective to their business owners, service owners, process owners. • Associate and link each strategic ‘where’ specification to their applicable owners (business owner). • Associate and link each strategic ‘how’ specification to their applicable owners (business-, service-, process-, application/system-, data-, platform- and/or infrastructure owner).

Figure 23: A table showing that strategy objects relate to owner and the tasks associated with it.

Strategy-Stakeholder/Resource Matrix

This matrix shows the columns of the strategy map in combination with the stakeholders/resources, the ‘who/whom’ in terms of which stakeholders/resources are involved in the strategy.

		What in terms of context specification e.g. Strategic Business Objectives	Where specification e.g. Enterprise, Business Area, Group etc	How specification e.g. Customers, finance, operations & learning
Stakeholder/ Resource 1	#			
Stakeholder/ Resource 2	#			
Stakeholder/ Resource N	#			

Figure 24: A matrix showing how strategy relates to stakeholder/resource.

The strategy matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the strategy map. In addition to those rules and tasks, the following rules and tasks are related to stakeholder/resource:

Business Resource/Actor (Stakeholder): A person, organization, or system that initiates or interacts with activities. Actors may be internal or external to an organization.	
Rules	<p>Strategy has a relationship with stakeholder.</p> <p>(S) Strategy is related to Resource.</p>
Tasks	<ul style="list-style-type: none"> • Associate and connect the stakeholder/resources to the Strategy (Strategic Business Objectives) • Associate and connect the stakeholder/resources to the Business Area and –Group. • Associate and connect the stakeholder/resources to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning.

Figure 25: A table showing that strategy objects relate to stakeholder/resource and the tasks associated with it.

Way of Modelling around Strategy aspects

The Strategy Way of Modelling provides the means for the various practitioners working with strategy aspects to assist them in defining the modelling principles to make an objective assessment of the possible strategy object relationships with other objects. It provides a uniform and formal description of the models where the strategy objects and artefacts within one or more different types of models can be portrayed. The strategy models are a representation that graphically represent and shows the strategy relationship and the interconnection of specific composed objects and complies with a specific set of rules for what the graphical components mean, and how they are connected to the rest of the business. The key ideal of a strategy model is that it is a representation, an illustration, of a composition of information intended to represent an aspect of an enterprise (e.g. business, application and/or technology), using a specific set of rules, which express a logic or grammar.

Each practitioner working with strategy aspects has to be able to translate the “Way of Working” into a “Way of Modelling”, which for the most part include the following:

- **Expressiveness:** the degree to which a given modelling technique is able to denote the models of any number and kinds of layered domains (business, application and technology).
- **Arbitrariness:** the degree of freedom one has when decomposing and composing different models on the same domain.
- **Suitability:** the degree to which a given modelling technique is specifically tailored for a specific kind of wanted output/result.
- **Comprehensibility:** the ease of how the way of working and way of modelling techniques are understood by participants.
- **Coherence:** the degree to which the individual sub-models of a way of modelling constitute a whole.
- **Completeness:** the degree to which all-necessary concepts of the application domains are represented in the way of modelling.
- **Efficiency:** the degree to which the modelling steps (e.g. LEADIng Practice steps) use resources such as time and people.
- **Effectiveness:** the degree to which the modelling principles achieve its goals.
- **Audit:** the degree to which the end results of the models achieve its goals.

Based on already acquired information from the strategy maps and/or a strategy matrices (or both), a strategy model is usually crafted to enable complex information to be used in different disciplines and within this to be communicated more easily to stakeholders, management and leadership. The fully integrated and standardized strategy templates enable the practitioner to work and model with the strategy objects throughout all the aspects of the enterprise (business, application and technology). Not only are the objects governed by its semantic relations and connection, also the specified strategy modelling rules and tasks, which ensure how and where the strategy templates interlink and share common strategy objects is defined and standardized.

As we explore earlier is the strategy matrix is the continuity of and interconnection between a strategy map (a representation of decomposed and/or composed objects) and a strategy model (a representation of interconnected and related objects). The strategy maps, matrices and models are therefore used in the decomposition and composition work (within and throughout the layers).

By using the strategy templates to manage the different kinds of highly connected information and relations, the strategy creation is ensured. The strategy map (which list the various related objects in order to capture the decomposed unrelated objects) is vital as well as the strategy matrix (which composes in terms of relating specific objects together) and the strategy model (which graphically represent the decomposed and composed objects) are both critical in integrating and standardizing the strategy templates and tools of the practitioner. Furthermore, it is an essential part of supporting as well as integrating and standardizing the practitioner's Way of Thinking, Working and Modelling.

Last but not least, it ensures integration of the Enterprise Modelling and Enterprise Architecture objects and artefacts. Bringing an organization that uses the strategy way of modelling templates to the highest maturity possible of working not only documented (level 3) or managed (level 4) but enabling optimization, governance and continuous improvement (level 5).

Strategy Decomposition & Composition Model

The Strategy Decomposition & Composition Model is already shown in Figure 2. As described there it shows the sixteen main areas that provide a starting point that can be used the analysis, decomposition, composition and construction of a strategy architecture description.

Strategy Model

The Strategy Model illustrates the relationship between strategy and:

1. Goals
2. Objectives
3. Value Indicators
4. Timing
5. Reporting
6. Business Area, -Group and -Owner
7. Business Owner
8. Service Area, -Group and -Owner
9. Process Area, -Group and Owner
10. Application/System owner
11. Data Owner
12. Platform Owner
13. Infrastructure Owner

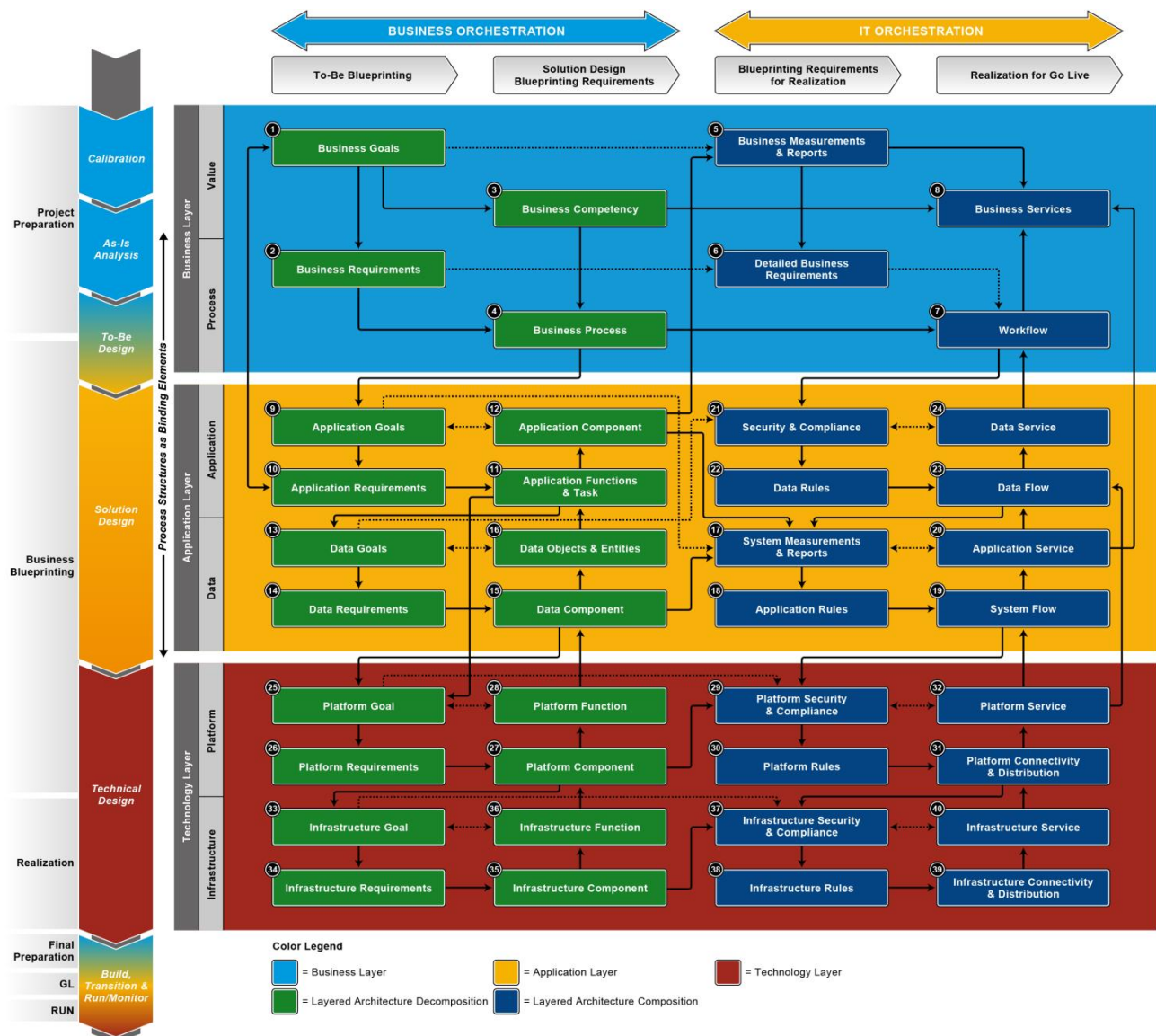
The Strategy Model is developed applying the corresponding architectural modelling rules. These have been described above in chapter 'Way of Working around Strategy aspects'. The corresponding tasks are included in chapter 'Way of Implementing' below.

Way of Implementing

The Strategy Reference Content's Way of Implementation combines the enterprise engineering, enterprise modelling and enterprise architecture principles in an order to apply the way of strategy thinking, strategy working and strategy modelling into the physical and thereby the strategy execution.

Most implementations fall short of transforming the business and creating real strategy due to the fact that they automate the existing Way of Working around strategy concepts. Thereby actually reinforcing a siloed and ineffective way of automation. It is about the possibility to totally rethink the strategy flow within the information flow, the strategy flow, the process flow as well as the measurement and reporting flow. It can fundamentally rethink and transform the different ways of working within an organization.

The Way of Strategy Implementation has been developed as a fully integrated part of a Blueprinting and Implementation concept. In this way, the strategy aspects can be integrated to any other engineering, modelling or architecture discipline e.g. process, strategy, application/software, data etc. With this the Way of Implementation provides a uniform and formal implementation concept of where the Strategy meta-objects and artefacts can be used. By using decomposition and composition modelling techniques within the 40 steps of the Way of Implementation, the strategy objects within the templates can be applied to the relevant subjects within the different layers (business, application or technology).



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Figure 26: A model showing the 40 Blueprinting & Implementation steps across the Business, Application and Technology Layer.

Example of the Business Layer where the Strategy Objects are used or applied within the implementation steps:

Step 1: Strategy Objects and the tasks to apply them within the Business Goals step:

- ✓ Map: Identify, classify and organize the **strategy** of the company (strategic business objectives) (Figure 5).
- ✓ Map: Associate and unite the **strategic business objectives** of the company (Figure 5).
- ✓ Map: Identify the **business areas and groups** that are affected by the strategic business objectives (Figure 5).
- ✓ Map: Identify the service areas and groups that are affected by the strategic business objectives (Figure 5).

- ✓ Map: Identify the process areas and groups that are affected by the strategic business objectives (Figure 5).
- ✓ Model: Create a detailed **Strategy Model** of the company's strategy in order to better illustrate the connection between and focus of the strategic business objectives of the company.
- ✓ Matrix: Associate and link the strategy to internal **forces**, external forces, internal **drivers** and external drivers that can affect the business (based on level of impact, severity and/or urgency) (Figure 7).
- ✓ Matrix: Associate, link and prioritize the strategy (strategic business objectives) of the company to the: 1. **Vision** of the company, and 2. **Mission** of the company (Figure 9).
- ✓ Matrix: Associate, link and prioritize the where specification of the strategy, e.g. business areas and -groups, to the: 1. **Vision** of the company, and 2. **Mission** of the company (Figure 9).
- ✓ Matrix: Associate and link the balanced scorecard area (how the strategy should be realized) to the: 1. **Vision** of the company, and 2. **Mission** of the company (Figure 9).
- ✓ Matrix: Associate and relate the strategic business objective to the **goals**: 1. Business goals, 2. Application goals, and 3. Technology goals (Figure 11).
- ✓ Matrix: Associate and relate the business areas /-groups to the **goals**: 1. Business goals, 2. Application goals, and 3. Technology goals (Figure 11).
- ✓ Matrix: Associate and relate the **goals**: 1. Business goals, 2. Application goals, and 3. Technology goals to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning (Figure 11).
- ✓ Matrix: Associate and connect the **objectives**: 1. Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting to the strategy of the company (Figure 13).
- ✓ Matrix: Associate and connect the **objectives**: 1. Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting to the strategic business areas and -groups of the company (Figure 13).
- ✓ Matrix: Associate and connect the **objectives**: 1. Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning (Figure 13).
- ✓ Model: Create a detailed Strategy Model in order to better illustrate the connection between and focus of the **objectives** 1. Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting, to the strategy of the company.
- ✓ Matrix: Associate and relate the strategic business objective to the **products** (Figure 17).
- ✓ Matrix: Associate and relate the business areas /-groups to the **products** (Figure 17).
- ✓ Matrix: Associate and relate the **products** to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning (Figure 17).
- ✓ Matrix: Associate and relate the strategic business objective to the **service area/group** (Figure 19).
- ✓ Matrix: Associate and relate the business areas /-groups to the **service area/group** (Figure 19).
- ✓ Matrix: Associate and relate the **service area/group** to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning (Figure 19).
- ✓ Matrix: Associate and relate the strategic business objective to the **process area/group** (Figure 21).
- ✓ Matrix: Associate and relate the business areas /-groups to the **process area/group** (Figure 21).
- ✓ Matrix: Associate and relate the **process area/group** to the strategy realization, e.g. Balanced Scorecard area customer, finance, operations, learning (Figure 21).

- ✓ Matrix: Link and unite the **value expectations** to the strategy of the company.
- ✓ Matrix: Associate and link each strategic business objective to the **business owners** (Figure 23).
- ✓ Matrix: Associate and link each strategic business objective to the **service owners** (Figure 23).
- ✓ Matrix: Associate and link each strategic business objective to the **process owners** (Figure 23).
- ✓ Matrix: Associate and link each strategic 'where' specification to their applicable **owners** (business owner) (Figure 23).
- ✓ Matrix: Associate and link each strategic 'how' specification to their applicable **owners** (business-, service-, process-, application/system-, data-, platform- and/or infrastructure owner) (Figure 23).

- ✓ Model: Create a detailed Strategy Model of the company's strategy in order to better illustrate the connection between and focus of the **strategic business objectives** of the company
- ✓ Model: Create a detailed Strategy Model of the company's strategy in order to better illustrate the connection between and focus of the business, application and technology **goals** of the company
- ✓ Model: Create a detailed Strategy Model in order to better illustrate the connection between and focus of the **objectives**: 1. Critical Success Factors, 2. Planning, 3. Forecasting, and 4. Budgetting, to the strategy of the company
- ✓ Model: Create a detailed Strategy Model in order to better illustrate the connection between and focus of the **performance**: 1. Strategic KPI's, 2. Tactical KPI's, 3. Operational KPI's, to the strategy of the company.
- ✓ Model: Create a detailed Strategy Model that includes a clear link between the strategy of the company and the **reporting** functions.
- ✓ Model: Create a detailed Strategy Model with a clear connection between each individual **business area, business group and business owner** to the strategy of the company.
- ✓ Model: Create a detailed Strategy Model with a clear connection between each individual **service area, service group and service owner** to the strategy of the company.
- ✓ Model: Create a detailed Strategy Model with a clear connection between each individual **process area, process group and process owner** to the strategy of the company.
- ✓ Model: Create a detailed Strategy Model with a clear connection between each individual **application/system owner, data owner, platform owner and infrastructure owner** to the strategy of the company

Roles involved

The following roles are involved in the definition and maintenance of the strategy templates:

ENTERPRISE MODELLERS	ENTERPRISE ENGINEERS	ENTERPRISE ARCHITECTS
Business Analyst (P)	Value Engineer (P)	Business Architect (P)
Process eXpert (P)	Technology Engineer (P)	Solution Architect (P)
Value eXpert (P)	Process Engineer (P)	Value Architect (P)
Information eXpert (S)	Quality Engineer (P)	Data Architect (P)
Strategy eXpert (P)	Change Engineer (P)	Strategy Architect (P)
Transformation eXpert (S)	Software Engineer (P)	Technology Architect (P)
		Process Architect (P)
		Enterprise Architect (P)
		Information Architect (P)

(P) = Primary object/role

(S) = Secondary object/role

Conclusion

While this document should be seen and used as a detailed description of how the strategy reference content can be used, it does not have all aspects of the strategy reference content and thereby its strategy engineering, modelling and architecture content. It attempted to build a basis of a structured way of thinking, working, modelling and implementation of strategy objects. It endeavoured to provide a standardized terminology, build common understanding and make available the standardized and integrated strategy templates. Enabling practitioners to use the strategy reference content to:

- Identify the relevant strategy objects.
- Decompose the strategy objects into the smallest parts that can, should and needs to be modelled, and then compose the strategy objects entities before building them (through mapping, simulation and scenarios).
- Visualize and clarify strategy object relationships with the strategy artefacts by using maps, matrices and models (alternative representation of information).
- Reduce and/or enhance complexity of strategy modelling, strategy engineering and strategy architecture principles applying the strategy decomposition and composition standard (see Decomposition and Composition Reference Content)
- Model the relevant strategy objects through the architectural layers (see Layered Architecture Reference Content).
- Adding Strategy Requirements (see Requirement Reference Content)
- Provide a structured Strategy Blueprinting and Implementation (see Blueprint & Implementation Reference Content).

For further learning around semantic object relations, decomposition and composition, layered modelling, engineering and architecture or how the strategy reference content can be used within the other LEADIng Practice Reference Contents we refer both to the LEADIng Practice Body of Knowledge document as well as the other LEADIng Practice Enterprise Standards and their Reference Content on www.LEADIngPractice.com.

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