((o))LEADING PRACTICE
We set the Enterprise Standards!

GLOBAL UNIVERSITY ALLIANCE

Introducing the Strategy Lifecycle

Using Ontology and Semiotics to Interlink Strategy Design to Strategy Execution

Author: Jamie Cain & Mark von Rosing

Presenter: Prof. Mark von Rosing

E-mail: mark@vonrosing.dk Twitter: vonRosing

Research

The ability of existing strategy concepts to analyse strategy, design strategy and execute strategy within organisations has an alarmingly poor historical track record. Based on the long-standing **semiotics and ontology research** work of the Global University Alliance (GUA) and its members, a Strategy Lifecycle is introduced.

The Strategy Lifecycle, underpinned by ontology and semiotics incorporates all the constructs that can be found in the most popular strategy concepts and frameworks. It explains the value of the underlying strategy ontology and the relationship between the **Strategy Meta Model, the Strategy Lifecycle and various artefacts** used around strategy work. The paper concludes with future scope and application that lies ahead for the Strategy Lifecycle.

Outline

((o))LEADING PRACTICE
We set the Enterprise Standards!

- Short Personal Introductions
- Research
- RESEARCH: Strategy Situation, Challenge & Issue
- RESEARCH: Strategy and Traditional Ways of Thinking
- Research Findings: Six Phases within the Strategy Lifecycle:
- The Value of an Underlying Strategy Ontology (Strategy Meta Model will be discussed)
- Findings around the Strategy Lifecycle

Researchers involved

((o))LEADING PRACTICE
We set the Enterprise Standards!

Enterprise Semantics (relations and rules), Prof. Simon Polovina, UK (academic researcher)

Enterprise Ontology (meta objects), Prof. Wim Laurier, Belgium (academic researcher)

Most common strategies applied, Jamie Caine, UK (PhD researcher)

Comparing Strategy concepts, method and approaches, Ian Dumanski, Canada (industry thought leader)

Typical Startegy Modelling concepts, Prof. Hans Scheruhn, Germany (academic researcher)

Strategy phases, Maria Hove, France (industry researcher)

Most common Strategy measures, Ulrik Foldager, Denmark (industry researcher)

Strategy Meta Model (Engineering), Prof. Ardavan Amini, UK (academic researcher)

Most common Strategy Artefacts, Prof. Maxim Arzumanyan, Russia (academic researcher)

Strategy patterns, Mark von Rosing, France (academic researcher)

Standard Bodies involved

((o))LEADING PRACTICE
We set the Enterprise Standards!

Enterprise Standard Body:
Georg Etzel
LEADing Practice, Co-CEO

Enterprise Architecture Framework:
John A. Zachman
Inventor and Father of Enterprise Architecture
Zachman International

International Organization for Standardization
Johan H Bendz
ISO SC7
WG 42 Convener

IEEE Coordinator:
Rich Hilliard
Institute of Electrical and Electronics Engineers
Editor of IEEE Std 1471:2000,

Software Standards Body:
Henk De Man
OMG VDML Chairman

Object Management Group

NATO Coordinators:
Johan Goossens
NATO Allied Command Transformation
Branch Head, Technology & Human Factors

UNESCO Coordinator:
Dr. Selin N. Şenocak
UNESCO Chair Holder
Cultural Diplomacy, Governance and Education
Director, Occidental Studies Applied Research Center
Political Sciences and International Relations Faculty Member

CSIR Coordinator:
Rentia Barnard
Research Institute CSIR
Enterprise Architect Research Group Leader

Information Security Standards Body:
Steve Durbin
CEO of Information Security Forum

OMG, Software Standards Body:
Fred Cummins
Business Modeling & Integration Task Force, Chairman
OMG Business Architecture Special Interest Group, Co-Chair

Jamie Caine

Jamie Caine is a thought leader and of visionary thinking within the field of strategy. From strategy-market analysis, strategy design, strategy development to strategy implementation and continuous improvement of the strategy; he masters the entire strategy lifecycle in both theory and practice. In the academic world he undertakes key responsibilities. He is a Senior Lecturer and Course Leader at Sheffield Hallam University (SHU), UK. Both on bachelor and masters level, he teaches Strategy Transformation and Organisational Dynamics.

In the Global University Alliance, which consist of over 405 universities, professors and researchers, he heads up the strategy relevant research topics across several areas. Including but not limited to: Enterprise/Business Ontology, Enterprise GPS, Enterprise Architecture and Value Modelling.

In industry, he is on the Advisory Board of the enterprise standard body LEADing Practice. Their he also leads the development and roll out of the various Strategy Standards and the Strategy Reference Content. The concepts are used by thousands of organisations around the world.

In his spare time, Jamie is a Group Scout Leader which proactively enables him to develop communities. He is currently working on his PhD and enjoys travelling with his wonderful family.

Mark von Rosing

Professor | | Standard Development Authority | Innovation & Transformation Guru

((o))LEADING PRACTICE
We set the Enterprise Standards!

Researcher

Pioneering in the field of patternicity research.

Chairman of Academia research in OMG

Co-chairman at Global University Alliance

Board Member

OMG
IEEE
ISO
W3C
NATO OTAN

Author

3 bestseller, 6 books and +40 articles.

Entrepreneur

((o))LEADING PRACTICE
We set the Enterprise Standards!

#1 Enterprise Standard provider for 56 Industries.

GLOBAL UNIVERSITY ALLIANCE

Impact

Involved of developing +150 Standards and 56 Industry Standards. Primary role in developing standards in the following standard bodies:

- **World Wide Web Consortium (W3C):** lead the World Wide Web development to its full potential by developing protocols and guidelines that ensure the long-term growth of the Web/Internet.
- **ISO:** coordinating the development of international standards among various national standards organizations. Currently focused on are ISO 42020 Architecture Process, and ISO 279, the Innovation Standard.
- **CEN:** the European Committee for Standardization (CEN, French: Comité Européen de Normalisation). Developing and maintaining coherent sets of standards and specifications across the thirty-three member countries. More than 60,000 technical experts as well as business federations, consumer, and other societal interest organisations are involved in the CEN network that reaches over 460 million.
- **NATO:** the North Atlantic Treaty Organization; developing standards for the intergovernmental military alliance organizations. Strategy and Performance Management is used for the collective defence joint mission execution, both in mutual defence in response to an attack by any external party as well as for peacekeeping missions. In addition, the standards from LEADing Practice related to capability modelling, joint Business Process Execution and Enterprise Architecture are used as basis for NATO standard development i.e. the NAF 4 (NATO Architecture Framework).
- **Energetics:** Development of the energy standard body.
- **The Information Security Forum (ISF):** development member of the Information Security Forum
- **Object Management Group (OMG):** develop joint standards between OMG and LEADing Practice. This includes:
- Value Delivery Modeling Language (VDML), Business Motivation Modeling (BMM), Business Process Modeling Notations (BPMN), Decision Model and Notation (DMN) and Risk & Threat Modeling
- **SAP AG** Method developer e.g. ASAP, SAP Agile, BPM, Enterprise Architecture (EAF)

RESEARCH: Strategy and Traditional Ways of Thinking

((o))LEADING PRACTICE
We set the Enterprise Standards!

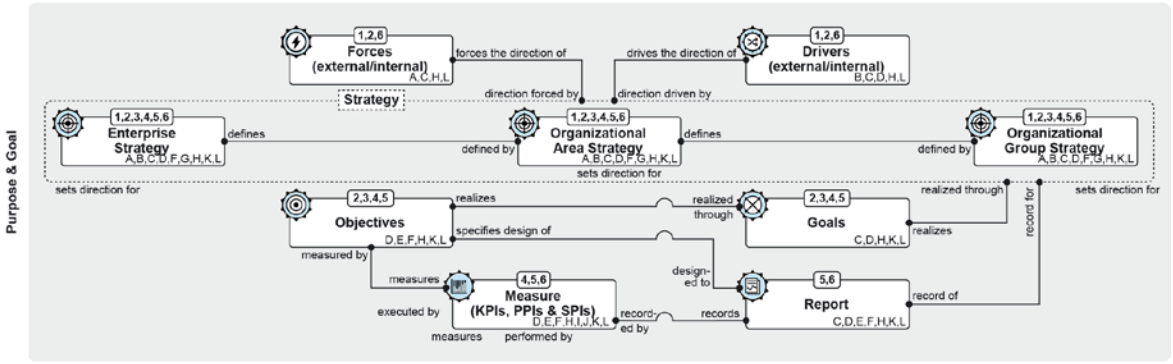
The notion of strategy by its most simple definition; “A plan of action designed to achieve a long-term or overall aim” [9] goes thousands of years beyond business strategic management science that has existed since the 1960’s.

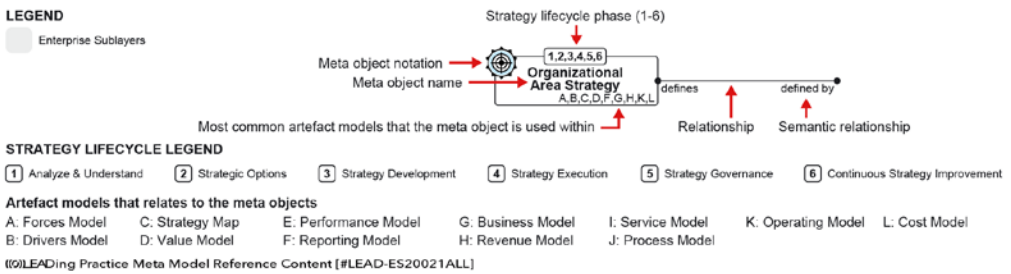
However, it is from the work of academia and industry practice since the 1960’s where we can examine how strategy has developed within the context of organisation.

Whilst this is a very brief summary of the development in strategy concepts, **it is important to understand the gaps in the existing theoretical strategy landscape.** For example Porter's Five Forces does not integrate with strategy options and strategy design, the BCG Matrix does not integrate with strategy execution.

Strategy Ontology Meta Model: Purpose & Goal Sublayer

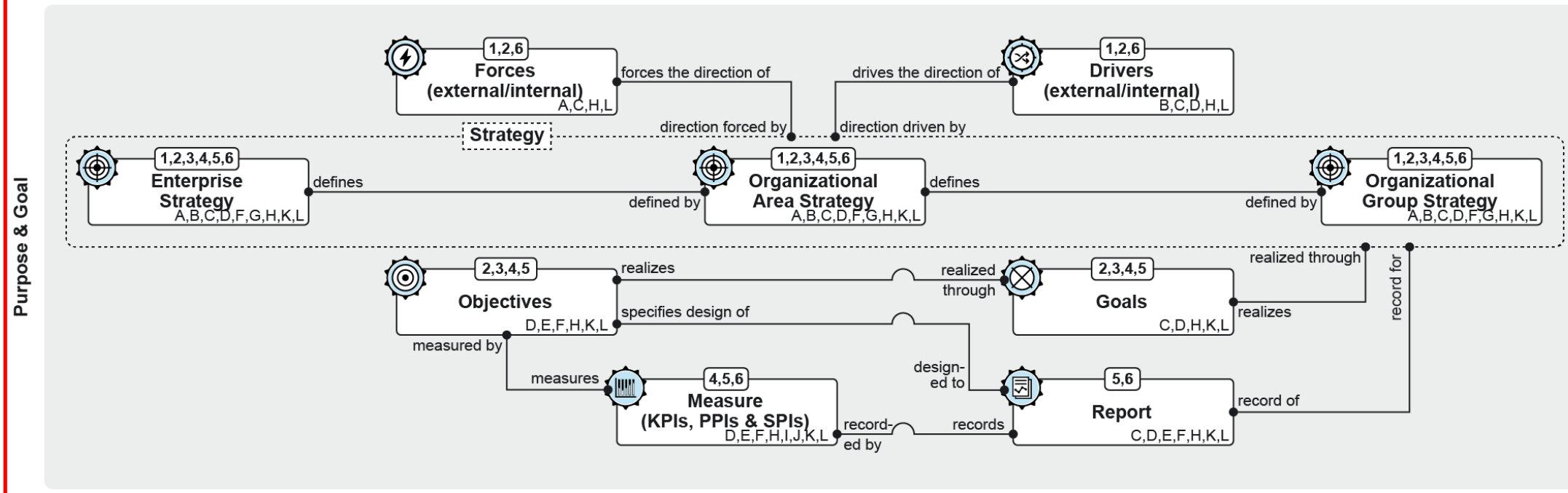
((o))LEADING PRACTICE
We set the Enterprise Standards!

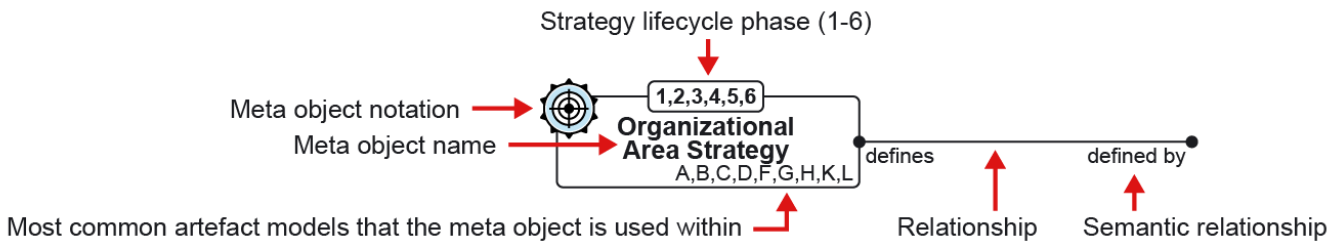




Purpose & Goal Sublayer: Building Blocks and Semantic Relationships

((o))LEADING PRACTICE
We set the Enterprise Standards!





STRATEGY LIFECYCLE LEGEND

1 Analyze & Understand | 2 Strategic Options | 3 Strategy Development | 4 Strategy Execution | 5 Strategy Governance | 6 Continuous Strategy Improvement

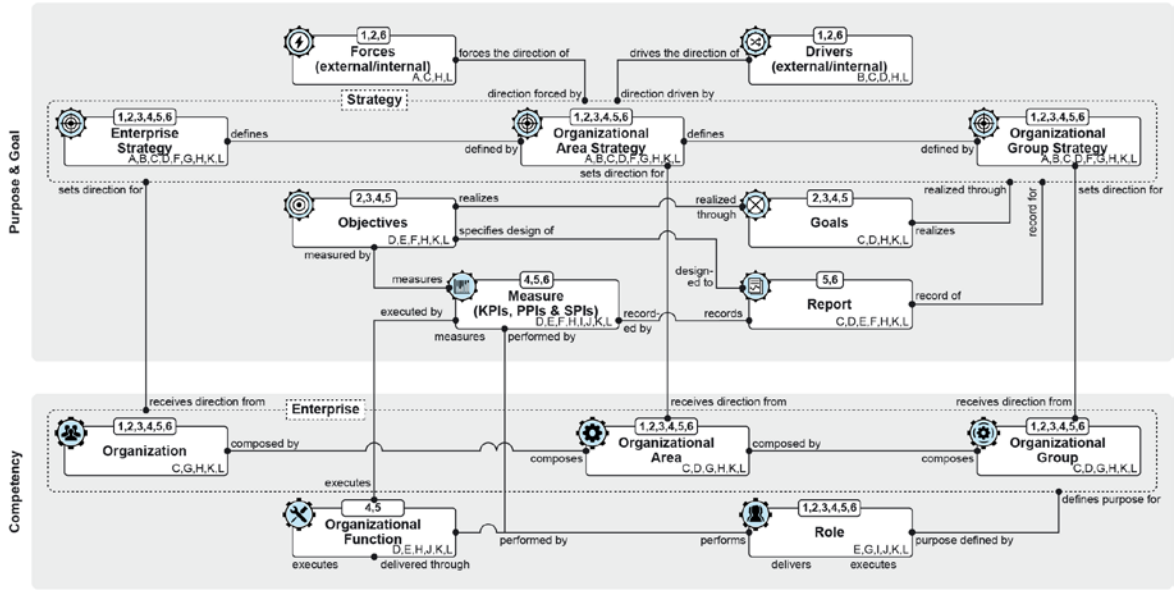
Artefact models that relates to the meta objects

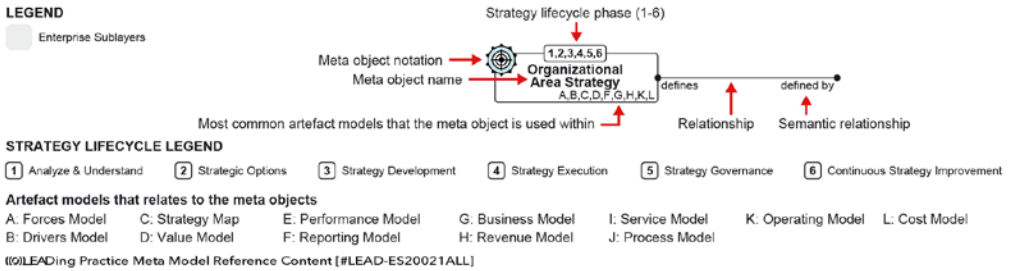
A: Forces Model	C: Strategy Map	E: Performance Model	G: Business Model	I: Service Model	K: Operating Model	L: Cost Model
B: Drivers Model	D: Value Model	F: Reporting Model	H: Revenue Model	J: Process Model		

((o))LEADing Practice Meta Model Reference Content [#LEAD-ES20021ALL]

Strategy Ontology Meta Model: Competency Sublayer

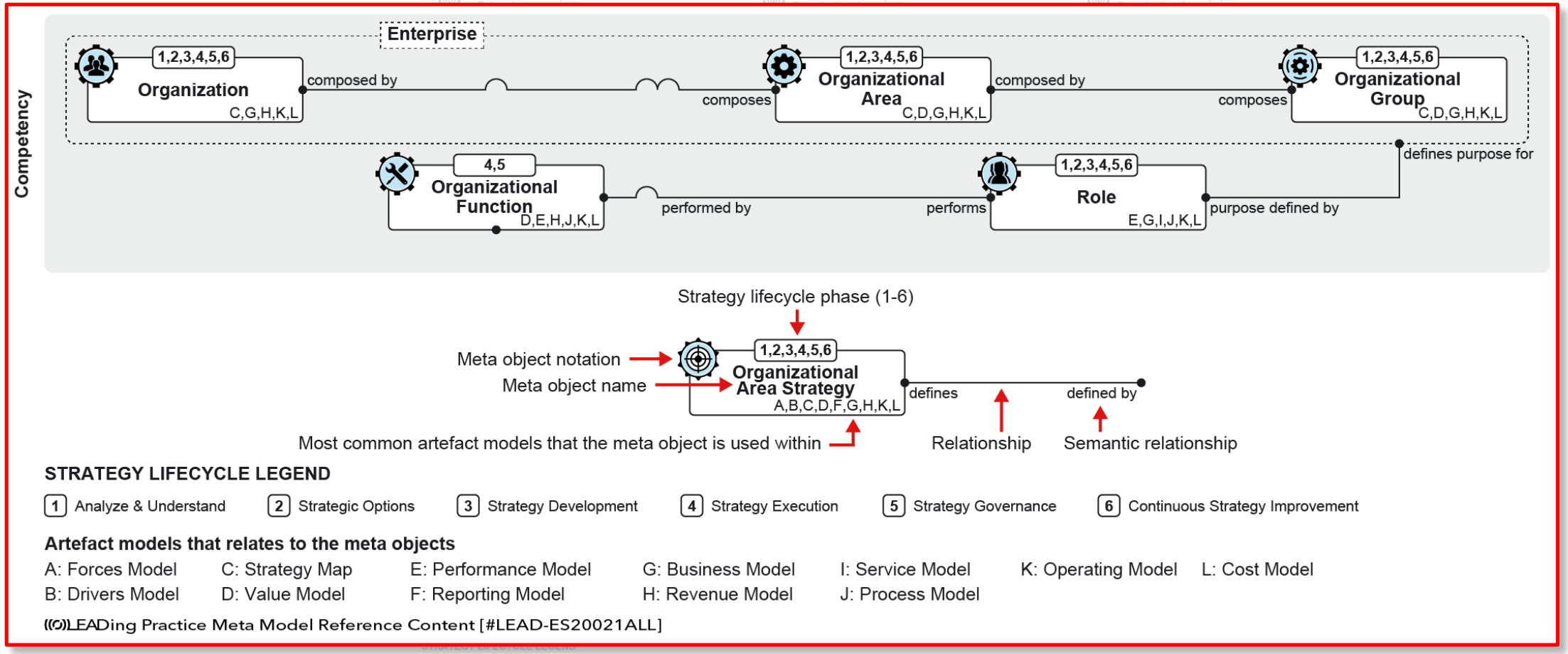
((o))LEADING PRACTICE
We set the Enterprise Standards!





Competency Sublayer: Building Blocks and Semantic Relationships

((o))LEADING PRACTICE
We set the Enterprise Standards!



STRATEGY LIFECYCLE LEGEND

1 Analyze & Understand | 2 Strategic Options | 3 Strategy Development | 4 Strategy Execution | 5 Strategy Governance | 6 Continuous Strategy Improvement

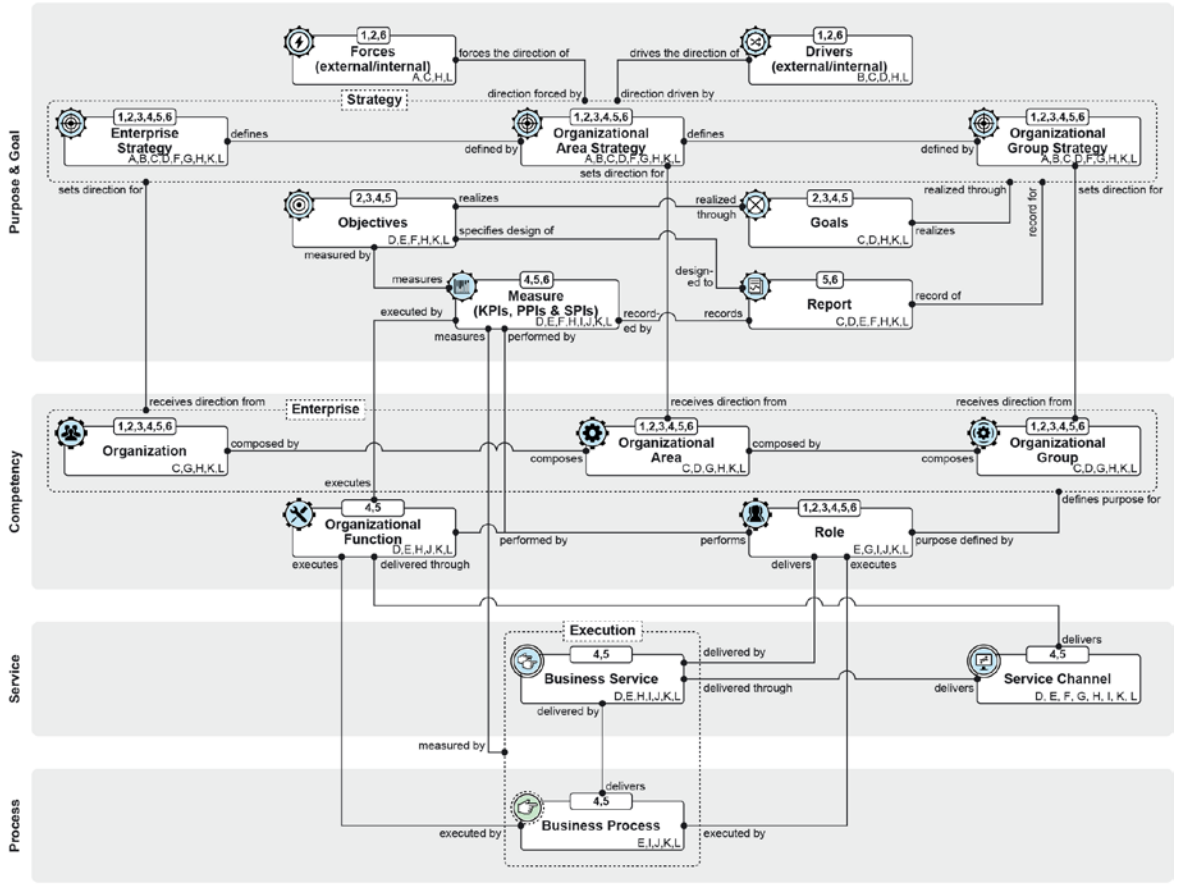
Artefact models that relates to the meta objects

A: Forces Model
B: Drivers Model
C: Strategy Map
D: Value Model
E: Performance Model
F: Reporting Model
G: Business Model
H: Revenue Model
I: Service Model
J: Process Model
K: Operating Model
L: Cost Model

((o))LEADing Practice Meta Model Reference Content [#LEAD-ES20021ALL]

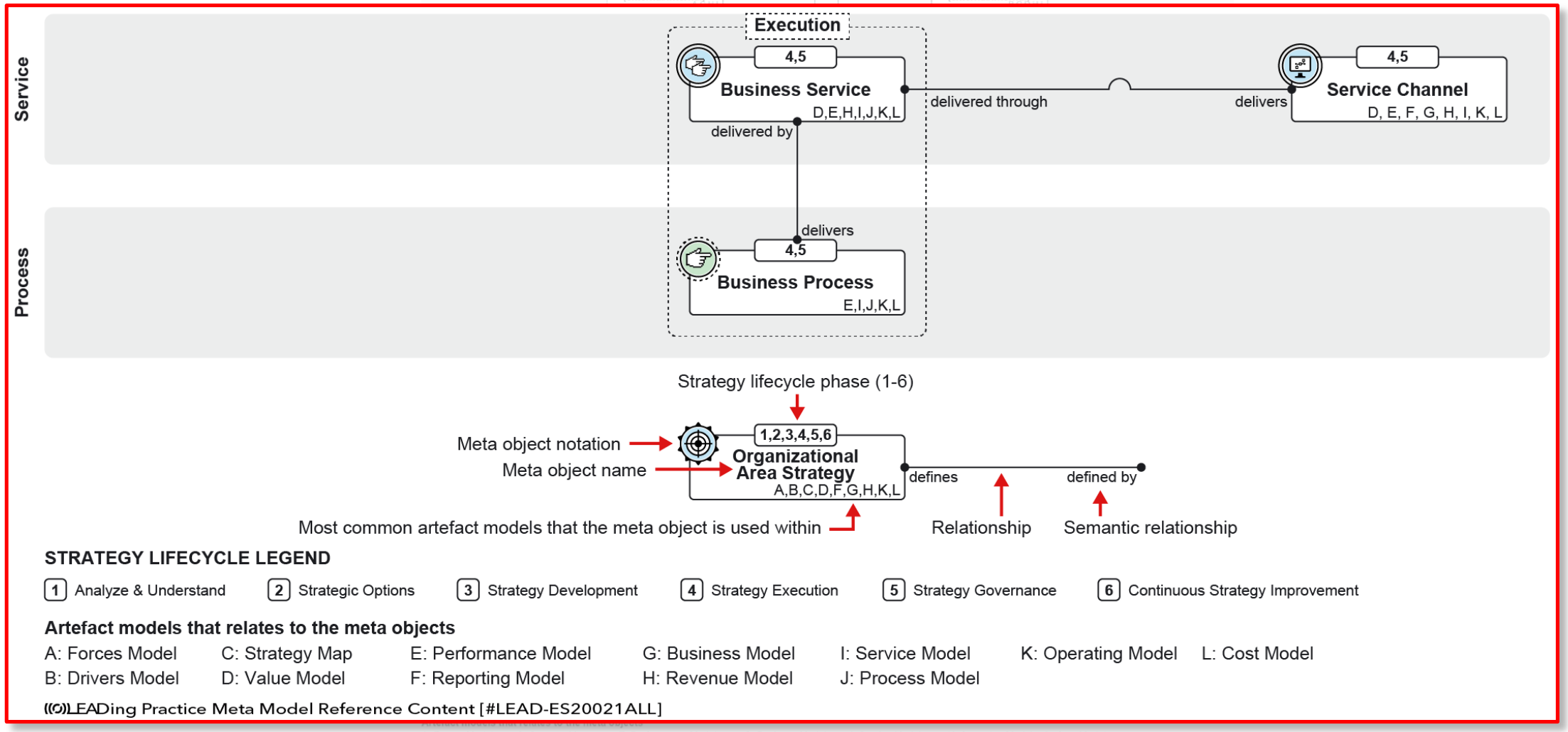
Strategy Ontology Meta Model: Service & Process Sublayers

((o))LEADING PRACTICE
We set the Enterprise Standards!



Service & Process Sublayers: Building Blocks and Semantic Relationships

((o))LEADING PRACTICE
We set the Enterprise Standards!



RESEARCH: Strategy Situation, Challenge & Issue

((o))LEADING PRACTICE
We set the Enterprise Standards!

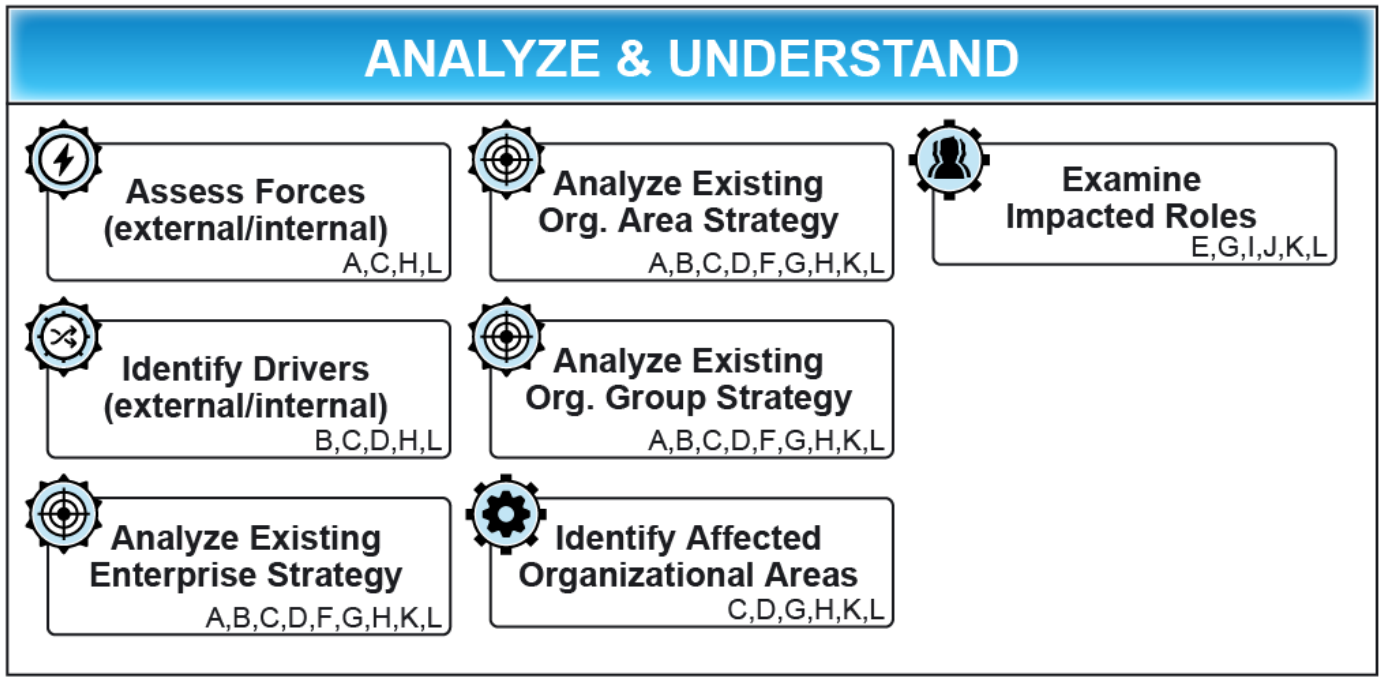
The challenge of taking your strategy design through to execution has been well documented. In fact, there has been an overwhelming rate of failure reported within the last two decades. Scholars of strategy have been critical of strategy implementation and its success rate. Bridges, an organisation that has been surveying strategy implementations since 2002 reported in their 2016 survey a failure rate of 67%. Their recent survey revealed that the main three reasons for implementation failure are:

- poor communication,
- lack of leadership; and
- using the wrong measures.

One in five organisations review their implementation on a monthly basis.

Research Findings: Strategy Analysis & Understanding phase exist within strategy work

((o))LEADING PRACTICE
We set the Enterprise Standards!



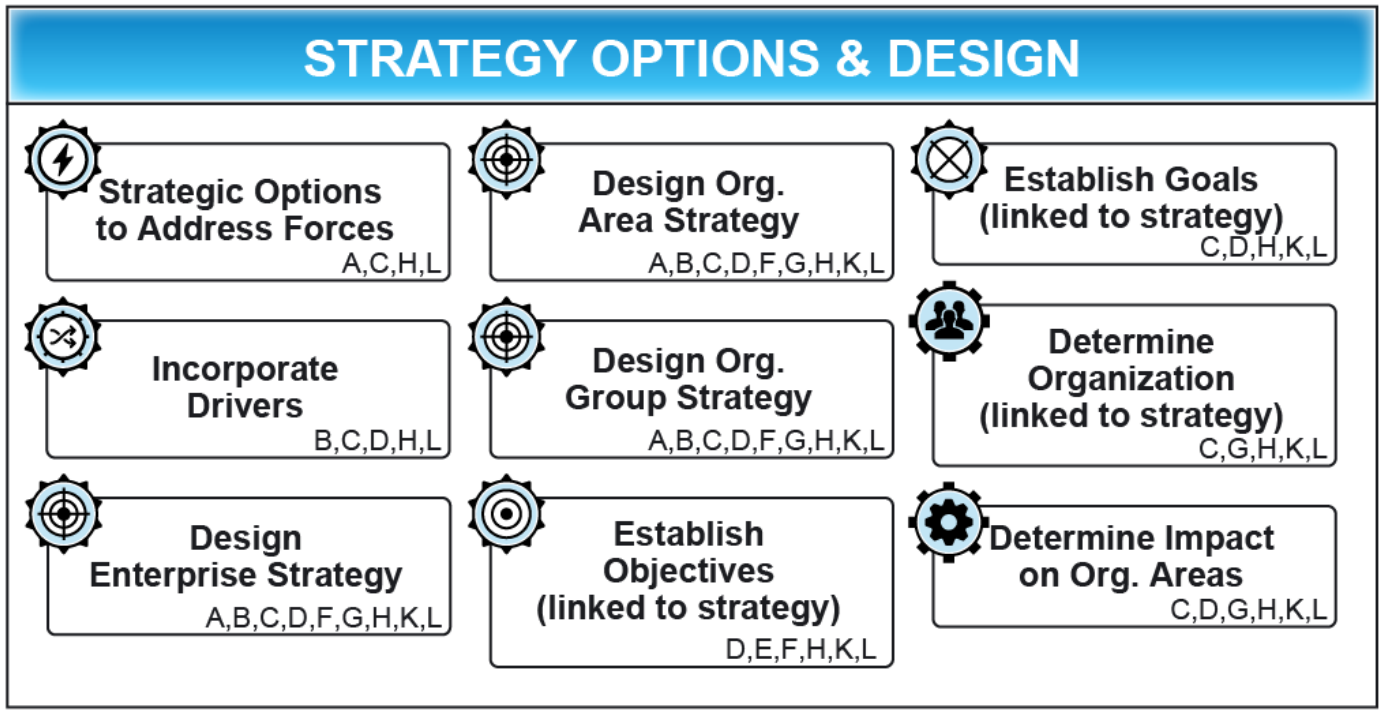
Artefact models that relates to the meta objects

A: Forces Model	C: Strategy Map	E: Performance Model	G: Business Model	I: Service Model	K: Operating Model
B: Drivers Model	D: Value Model	F: Reporting Model	H: Revenue Model	J: Process Model	L: Cost Model

((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

Research Findings: Strategy option and design phase exist within strategy work

((o))LEADING PRACTICE
We set the Enterprise Standards!



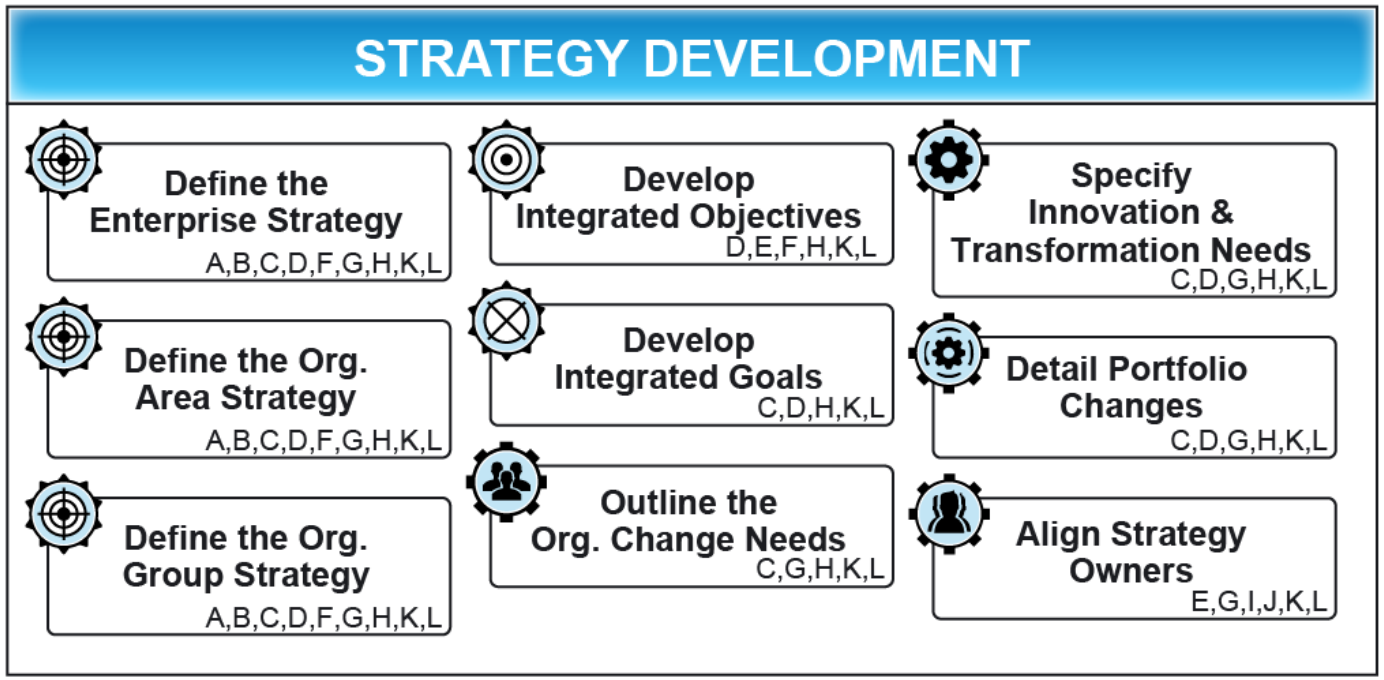
Artefact models that relates to the meta objects

A: Forces Model	C: Strategy Map	E: Performance Model	G: Business Model	I: Service Model	K: Operating Model
B: Drivers Model	D: Value Model	F: Reporting Model	H: Revenue Model	J: Process Model	L: Cost Model

((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

Research Findings: Strategy Development phase exist within strategy work

((o))LEADING PRACTICE
We set the Enterprise Standards!



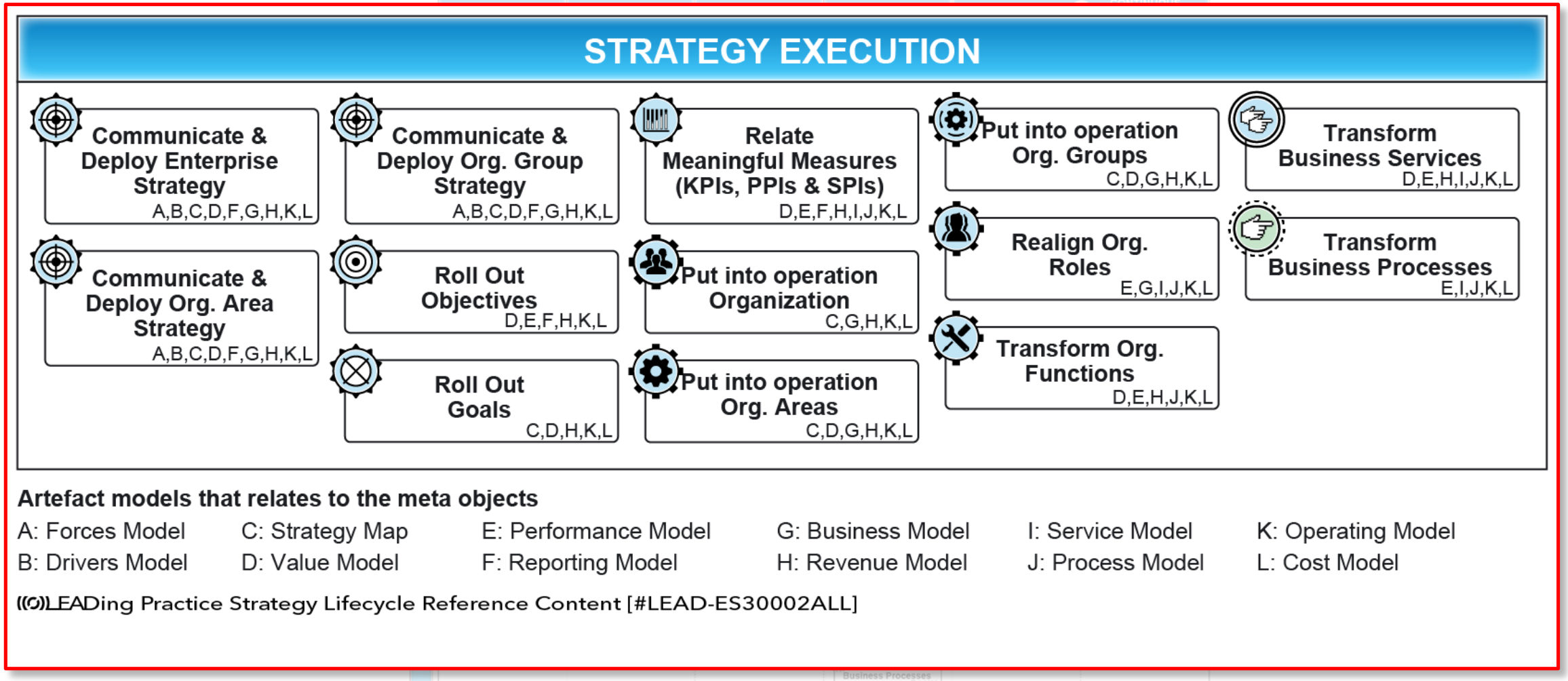
Artefact models that relates to the meta objects

A: Forces Model	C: Strategy Map	E: Performance Model	G: Business Model	I: Service Model	K: Operating Model
B: Drivers Model	D: Value Model	F: Reporting Model	H: Revenue Model	J: Process Model	L: Cost Model

((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

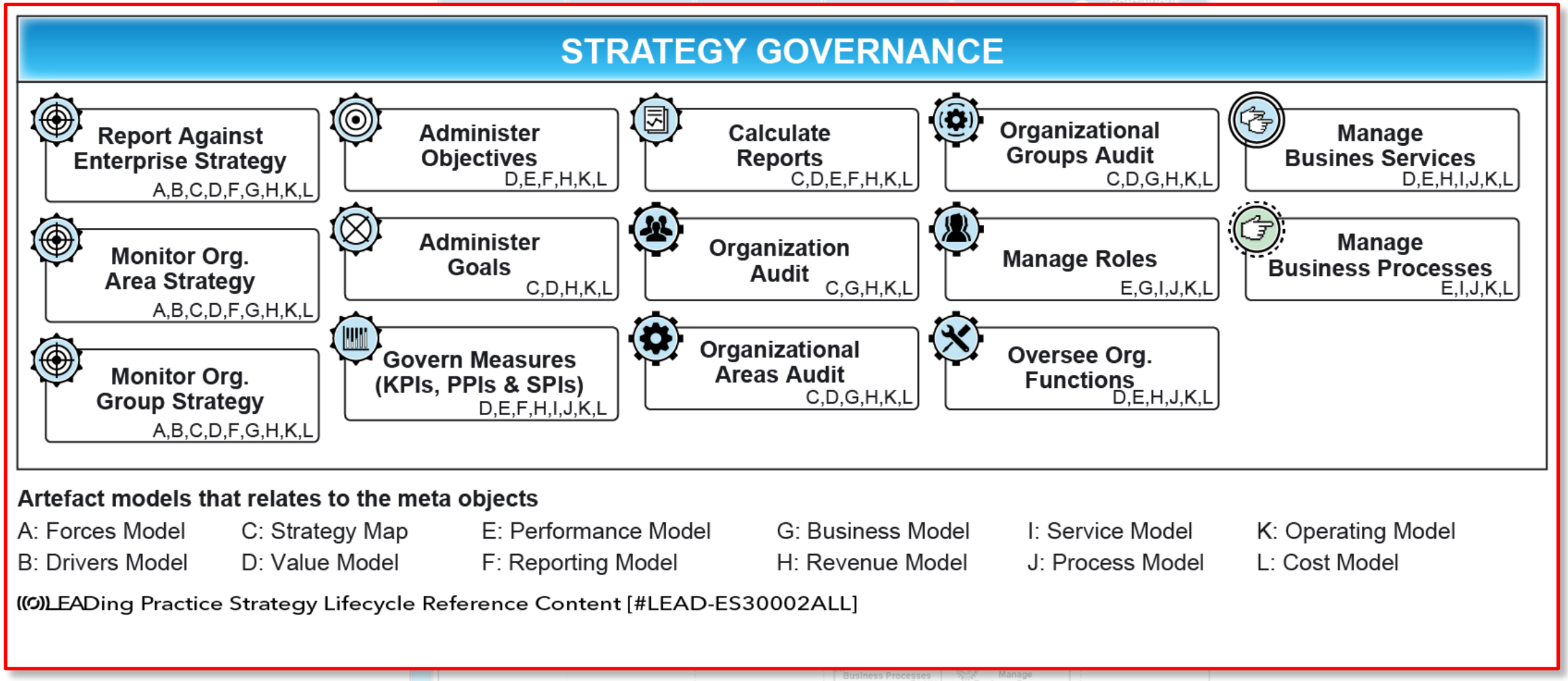
Research Findings: Strategy Execution phase exist within strategy work

((o))LEADING PRACTICE
We set the Enterprise Standards!



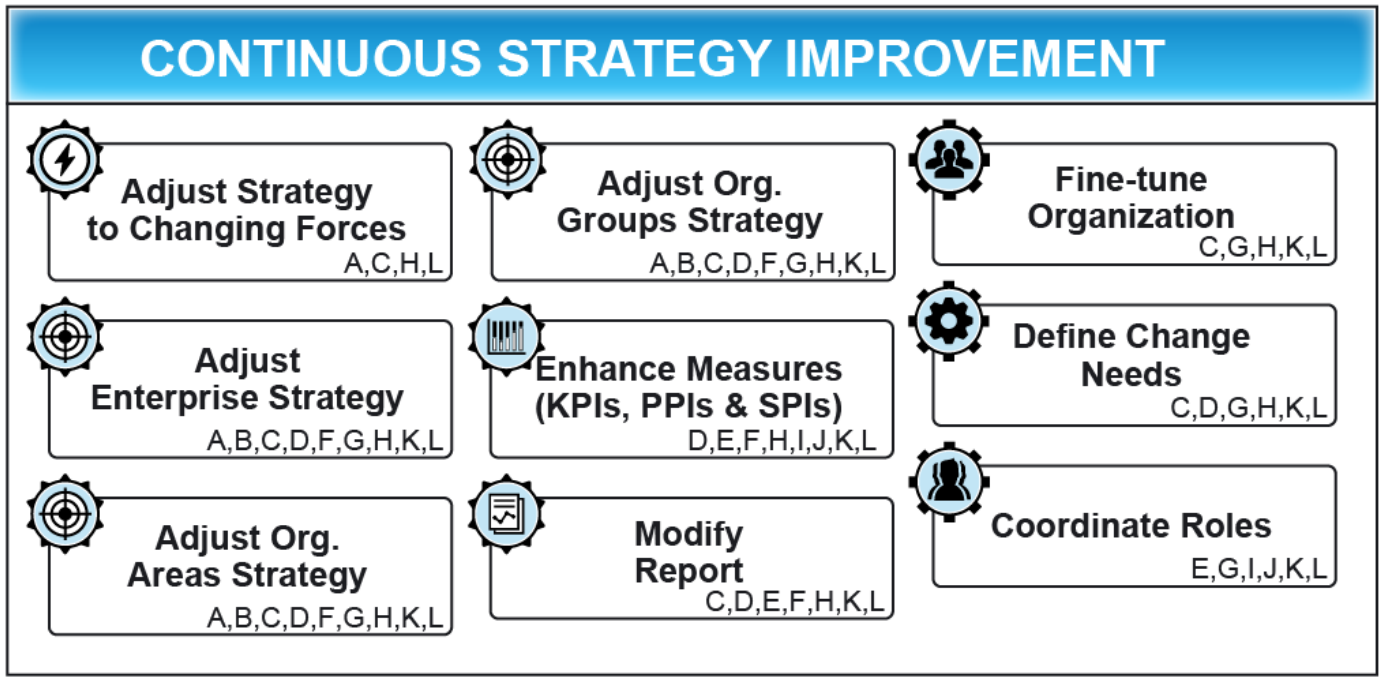
Research Findings: Strategy Governance phase exist within strategy work

((o))LEADING PRACTICE
We set the Enterprise Standards!



Research Findings: Continuous Improvement phase exist within notation of strategy work

((o))LEADING PRACTICE
We set the Enterprise Standards!



Artefact models that relates to the meta objects

A: Forces Model	C: Strategy Map	E: Performance Model	G: Business Model	I: Service Model	K: Operating Model
B: Drivers Model	D: Value Model	F: Reporting Model	H: Revenue Model	J: Process Model	L: Cost Model

((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

Additional aspects to the Strategy Lifecycle

((o))LEADING PRACTICE
We set the Enterprise Standards!

The Strategy Lifecycle thereby consists of a set of phases in which each phase is inter-linked with the previous one.

It provides a highly useful sequence of phases and steps that any strategy practitioner, executive, business analyst or even business architect can follow, regardless of industry and size of organisation.

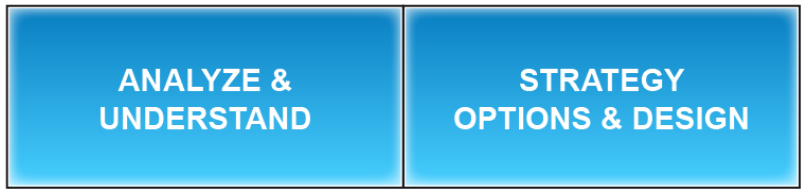
The proposed Strategy Lifecycle concepts are as discussed interlinked between each other, but it also can be combined with any kind of other lifecycle thinking, such as the product lifecycle, value lifecycle, service lifecycle, process lifecycle, application lifecycle or an enterprise architecture lifecycle.

Research Findings: Six Phases within the Strategy Lifecycle: Analyze & Understand

((o))LEADING PRACTICE
We set the Enterprise Standards!

Research Findings: Six Phases within the Strategy Lifecycle: Strategy Options & Design

((o))LEADING PRACTICE
We set the Enterprise Standards!



((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

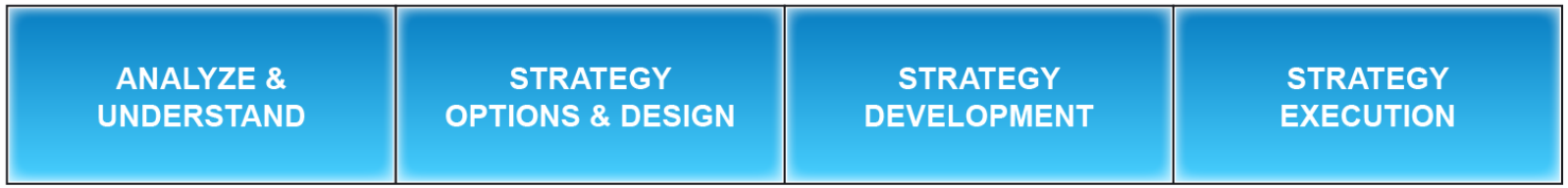
Research Findings: Six Phases within the Strategy Lifecycle: Strategy Development

((o))LEADING PRACTICE
We set the Enterprise Standards!

((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

Research Findings: Six Phases within the Strategy Lifecycle: Strategy Execution

((o))LEADING PRACTICE
We set the Enterprise Standards!



((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

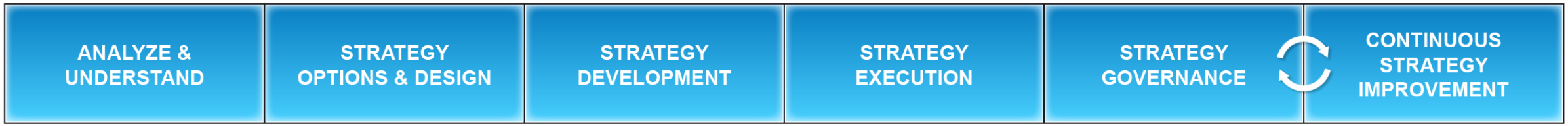
Research Findings: Six Phases within the Strategy Lifecycle: Strategy Governance

((o))LEADING PRACTICE
We set the Enterprise Standards!

((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

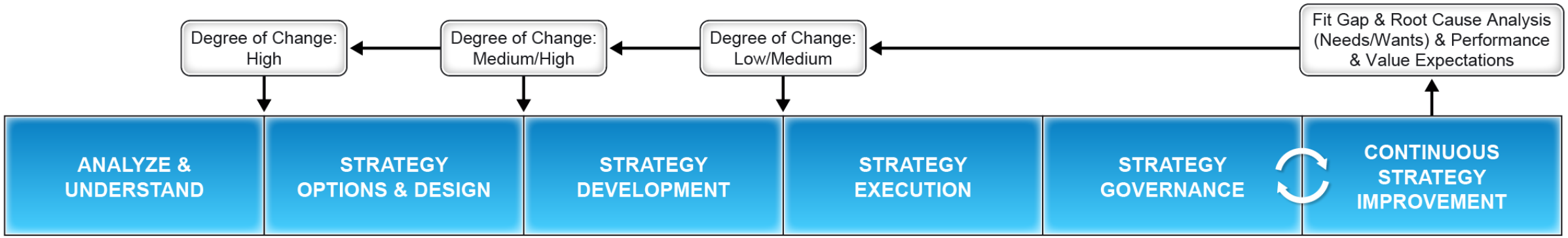
Research Findings: Six Phases within the Strategy Lifecycle: Continuous Strategy Improvement

((o))LEADING PRACTICE
We set the Enterprise Standards!



((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

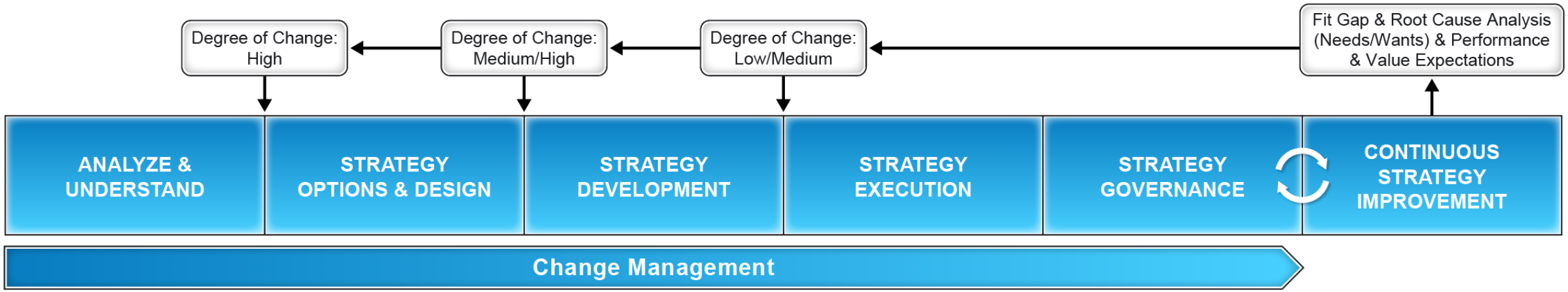
Research Findings: Six Phases within the Strategy Lifecycle: Degrees of Change



((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

Research Findings: Six Phases within the Strategy Lifecycle: Change Management

((o))LEADING PRACTICE
We set the Enterprise Standards!



((o))LEADing Practice Strategy Lifecycle Reference Content [#LEAD-ES30002ALL]

Findings around the Strategy Lifecycle

((o))LEADING PRACTICE
We set the Enterprise Standards!

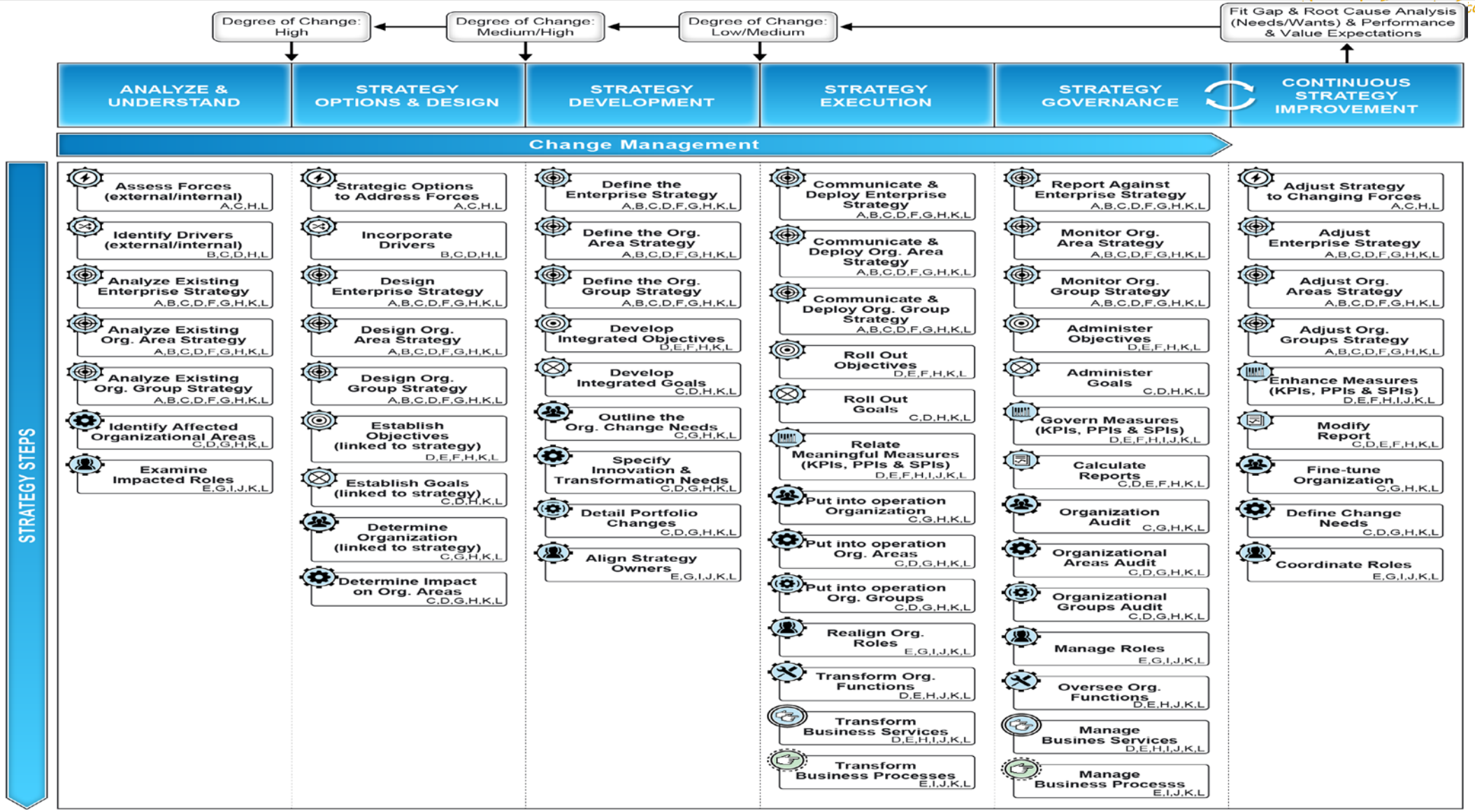
When a practitioner or organisation decides to use the Strategy Lifecycle to lay the foundation of what we call ‘the strategy way of working’; all employees across all organisational boundaries of the enterprise, now have a conjoint way of working with strategy in the course of its lifecycle.

This means that a **common understanding and consensus has been reached** within the organisation, which immediately **increases the level of strategy maturity**.

Here follows an illustration of the most common steps in **the Strategy Lifecycle phases. You will notice that the steps are not linear and interlinked, this is due to the fact that this is not a waterfall approach.**

The Strategy Lifecycle: Continuous Strategy Improvement

((o))LEADING PRACTICE
Standards!

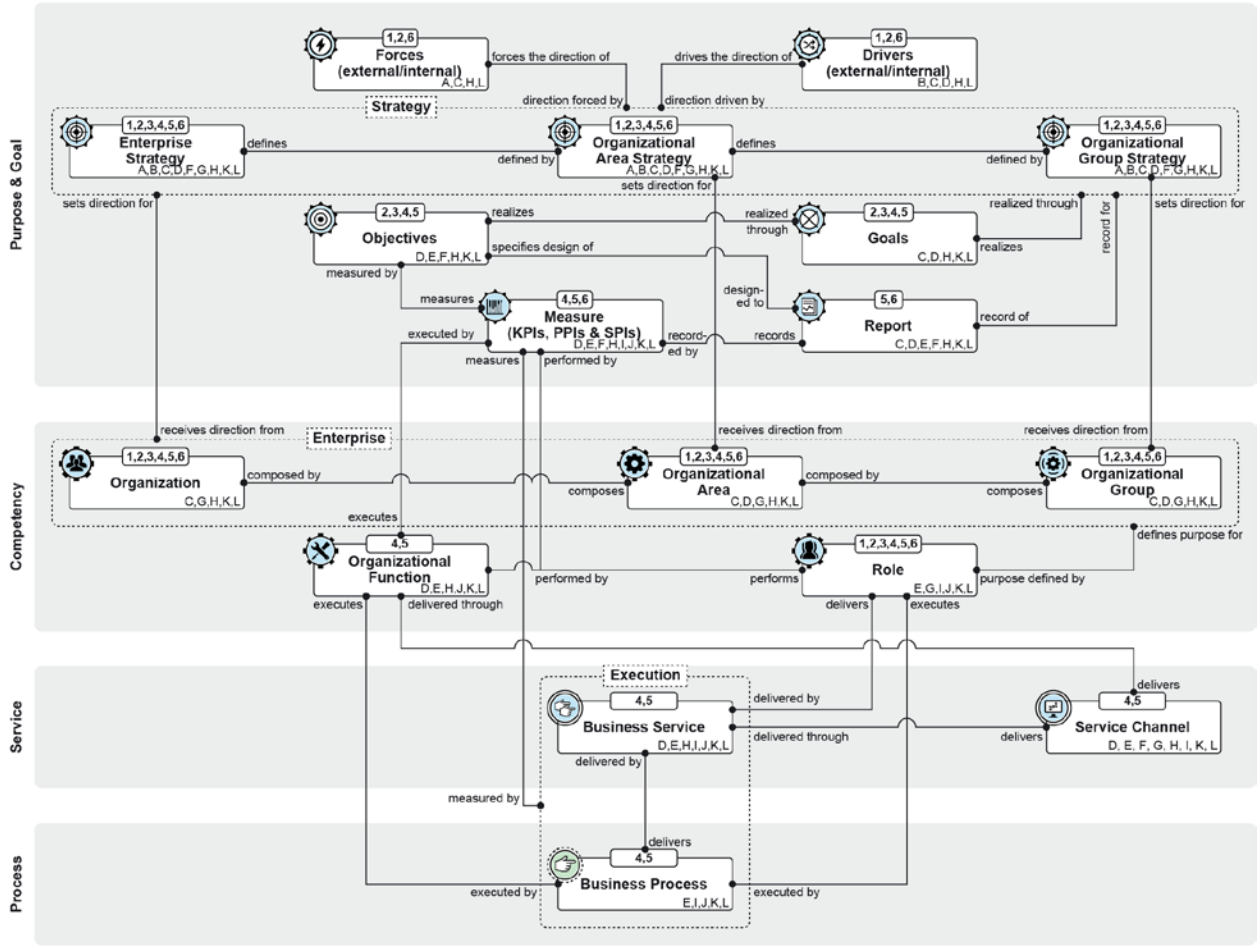


Artefact models that relates to the meta objects

A: Forces Model
B: Drivers Model
C: Strategy Map
D: Value Model
E: Performance Model
F: Reporting Model
G: Business Model
H: Revenue Model
I: Service Model
J: Process Model
K: Operating Model
L: Cost Model

Strategy Meta Model

((o))LEADING PRACTICE
We set the Enterprise Standards!



LEGEND

Enterprise Sublayers

Strategy lifecycle phase (1-6)

Meta object notation

Meta object name

1,2,3,4,5,6 Organizational Area Strategy A,B,C,D,F,G,H,K,L

defines

defined by

Most common artefact models that the meta object is used within

Relationship

Semantic relationship

STRATEGY LIFECYCLE LEGEND

1 Analyze & Understand | 2 Strategic Options | 3 Strategy Development | 4 Strategy Execution | 5 Strategy Governance | 6 Continuous Strategy Improvement

Artefact models that relates to the meta objects

A: Forces Model | B: Drivers Model | C: Strategy Map | D: Value Model | E: Performance Model | F: Reporting Model | G: Business Model | H: Revenue Model | I: Service Model | J: Process Model | K: Operating Model | L: Cost Model

Conclusion

((o))LEADING PRACTICE
We set the Enterprise Standards!

The Strategy Lifecycle provides a truly interlinked approach from strategy design to strategy execution. The underlying ontology and semiotics allows us to take any organisational strategy and integrate it into the way of thinking, working and modelling regardless of industry type.

The Strategy Lifecycle is based upon an empiric ontology, meaning that its roots lie in both practice and research. Consequently, it covers all aspects of the strategy phases. Some of the gaps discussed in the strategic theory and models can therefore be fulfilled with the Strategy Lifecyle approach.

It is designed to be vendor neutral/agnostic and it can therefore be used with most existing frameworks, methods and approaches that have any of the mentioned relevant strategy meta objects.

QUESTIONS?

Global University Alliance

Professor Mark von Rosing
LEAD Enterprise Architect
Head of Global University Alliance

Mobile +33 640 194 034
E-Mail: MvR@GlobalUniversityAlliance.net

For more information:
www.globaluniversityalliance.net