



1-1 INITIATIVE REVIEW

MILESTONES DEEP DIVE

STRATEGIC SUCCESS UNVEILED

Mastering Yearly Planning for Business Excellence

Budget & Business
Plan

POWERED BY HOWWE TECHNOLOGIES



STRATE

TABLE OF CONTENTS

- The Strategic Triad: Planning, Execution, and Follow-Up
- Kajsa Rosén, Business Unit Manager for Railway at SWECO, shares her insights on the Yearly Planning Wheel
- The Yearly Planning Wheel
 - Planning & Preparations: Budget & Business Plan, Initiative Planning and Anchoring
 - Strategy Stand-Ups
 - Milestone Deep Dives
 - 1-1 Initiative Reviews
- Your Check List
- Navigating the Strategy Maze: Recognizing & Overcoming Common Pitfalls
- Howwe - Simplifying Growth





PLANNING FOR GROWTH

How to create plans is second nature to most leaders. The challenge, however, lies in executing these plans in the coming year.

Step into the realm of strategic mastery with the Yearly Planning Wheel—a transformative approach that turns the tide of time-consuming meetings and haphazard planning into a streamlined voyage. This ebook isn't just a read; it's an arsenal of best practices, curated from real-world triumphs designed to catapult your planning process into simplicity.

Equipped with ready-to-implement agendas, optimized frequency schedules, and a cache of best practices drawn from real-world victories, you'll transform the way your team operates—spending less time in meetings and more time achieving milestones. The outlined processes will empower you to navigate the complexities of annual planning with confidence, whether you're a seasoned strategist or new to the nuances of business planning.

Embrace the Yearly Planning Wheel and let it guide you through a year marked by saved time, heightened focus, and accelerated success. Welcome to a smarter way of planning—where strategic proactivity leads to exceptional business outcomes.

The Strategic Triad:

MASTERING PLANNING, EXECUTION, AND FOLLOW-UP

In strategic business planning, success hinges on three key processes: Planning, Execution, and Follow-up. These elements are essential to align every team and function with the company's strategy, turning vision into reality. Mastering them is crucial for any organization aiming for success.

1. Elevating Planning Quality Across the Board

Quality planning is the bedrock upon which successful strategies are built. Within individual teams, it demands clarity, coherence, and adaptability. But the true challenge lies in scaling this quality across the entire organization, where the interplay of cross-functional dynamics comes into play.

2. Execution - Operationalizing Strategy Beyond the Slide Deck

A strategy that lives only in PowerPoint is like a blueprint for a ship that never sets sail. Operationalizing strategy means taking that blueprint and turning it into a vessel that can navigate the real-world waters. It's the transition from theory to practice, from 'what' to 'how', from cool concepts to practical behaviors that resonate through the organization's hallways, factory floors, and meeting rooms.

3. The Art of Strategic Follow-Up

How we follow up on our strategy is what breathes life into it over time. The rhythm of this follow-up, the forums chosen for discussion, and the delineation of what belongs where—these are the brushstrokes that paint the big picture. In a complex hierarchy, amidst a web of cross-functional dependencies, the follow-up is the compass that keeps us oriented, ensuring we don't circle back to previously trodden paths.

“If you don't master these skills, your strategy will falter, showing uneven progress and going in circles. It's not just about moving forward; it's about making our strategy journey efficient.”

- ISABELLE UNHO
BUSINESS MANAGER AT HOWWE TECHNOLOGIES



”

“Commitment and participation across the organization are vital for effective strategy. They act as catalysts for action and should be ingrained from the strategy's conception, not just its launch.”

JOHAN GRÖNSTEDT
CHIEF PRODUCT OFFICER AT HOWWE TECHNOLOGIES



Kajsa Rosén on Mastering Strategic Planning: The Power of the Yearly Planning Wheel at SWECO

Kajsa Rosén, Business Unit Manager for Railway at SWECO, appreciates the transformative impact of the Yearly Planning Wheel on strategic planning and organizational alignment.

Kajsa highlights the Planning Wheel's role in streamlining processes and ensuring that every activity is in sync with the company's strategic goals.

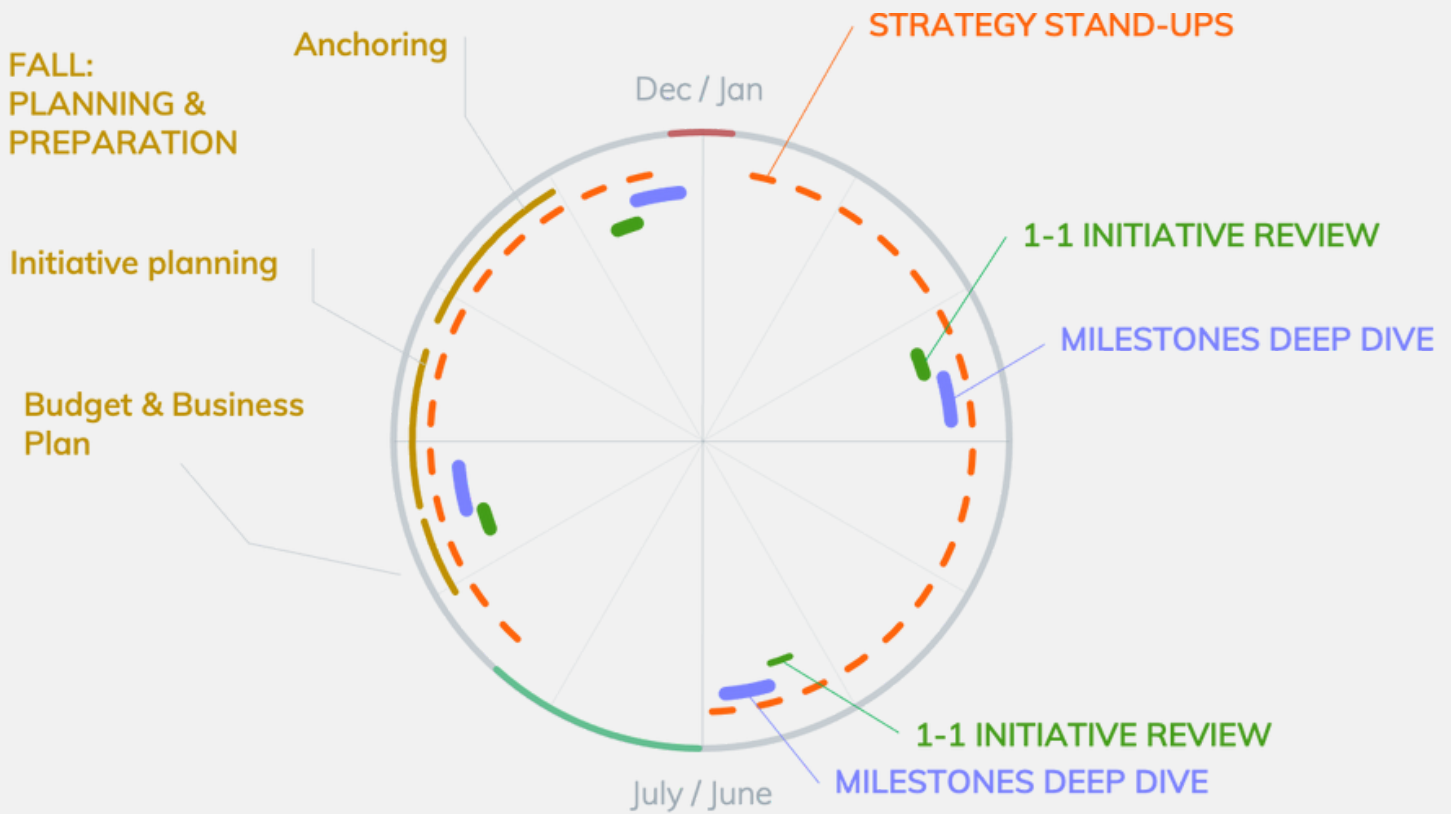
"It's a tool that simplifies my workload and aligns our collective efforts towards our primary objectives," she says. This framework not only helps in setting priorities but also in identifying what actions not to pursue. "Determining what not to engage in is just as crucial as selecting our priorities," Kajsa explains.

"In the bustle of daily operations, it's easy to lose sight of our strategic objectives. This method helps us stay focused on tasks that truly propel us forward. It creates a clear structure and that saves me a lot of time".



To Kajsa Rosén and her team at SWECO, the Yearly Planning Wheel is an instrumental tool in enhancing strategic planning, allowing them to navigate with precision and purpose towards their strategic goals.

THE YEARLY PLANNING WHEEL



Streamlining steering with the Yearly Planning Wheel covers the three essential aspects of planning, execution, and follow up. The four meeting types are designed not as mere formalities, but as strategic levers to simplify the execution of your strategy. By embracing this structured approach to meetings, your organization can foster a shared platform that underpins success at every level. Counter silent sabotage and resistance, ensure leaders set clear expectations, prevent a focus loss in short-term tasks, and foster organizational alignment for accelerated strategy execution.

Let's dive into each step of the Planning Wheel.



Learn more about the Planning Wheel in this video

STEP 1: PLANNING & PREPARATION



1.1 Budget Process (September/October):

Start by discussing essential investments and outlining the Most Important Goals for the forthcoming year.

1.2 Initiative Planning (October/November):

Translate broader objectives into actionable steps. Evaluate the relevance of initiatives, ensure they align with Most Important Goals (MIGs), and detail sub-initiatives. Establish a company-wide deadline for planning milestones that extend at least three months into the future. This creates a unified rhythm of expectation and progress. Chart out milestones for initiatives, predicated on clear communications from leadership regarding the expected contributions of each team and the timeline for these plans.

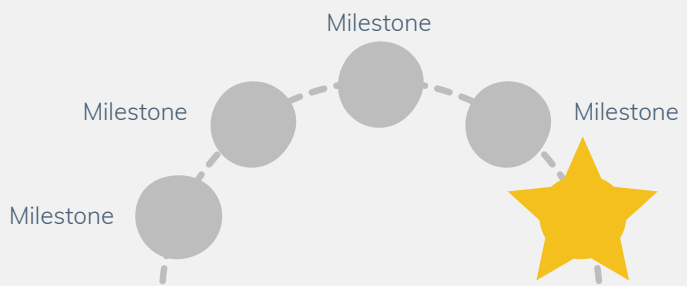
Milestones are the bedrock of your strategic initiatives. Think of them as critical key activities—whether it's a leap in digitization or a sales target—that delineate what must be done to advance your goals. By setting these milestones, you reverse-engineer your path to success. This not only aids in planning but also clarifies the forward journey for initiative owners without overwhelming them with details.

1.3 Anchoring (Mid-November to Mid-December):

Team Preparations for the upcoming year. Anchor new MIGs and initiatives, formulating MIGs across organizational levels and planning Milestones. Choose your planning horizon. Start at where you need to end up and plan backwards. Focus on the big stuff, the Milestones.

Per initiative you own, ask the question: “What do we need to accomplish for each period to ensure that the initiative impacts our final goal enough?”

Each team sets the date for the first Strategy Stand-Up to ensure a proactive start to the new year.

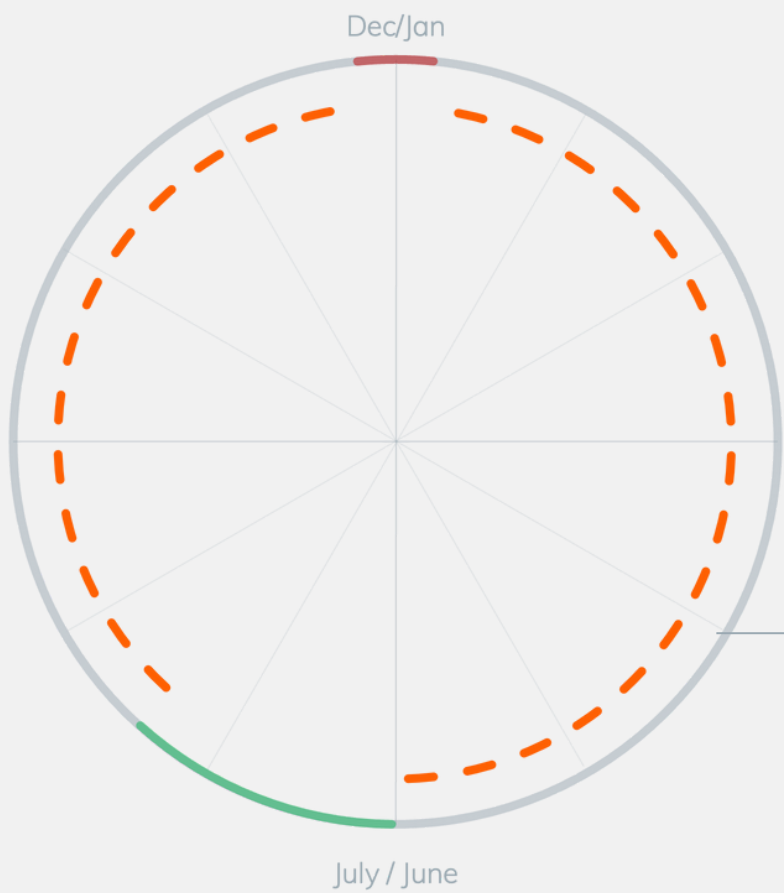




"Company initiatives often feel like they are on top of what one is expected to do operationally. Therefore, it is very important to break this down clearly and, above all, free up time through a structured meeting approach that involves both reflection on past actions and planning for the future."

Johan Magnusson, Group CEO,
Kährs Group





STEP 2: STRATEGY STAND-UPS

Leader: Team Lead
Participants: Whole team
Frequency: 30 min weekly / bi-weekly
Purpose: Commitment and follow up

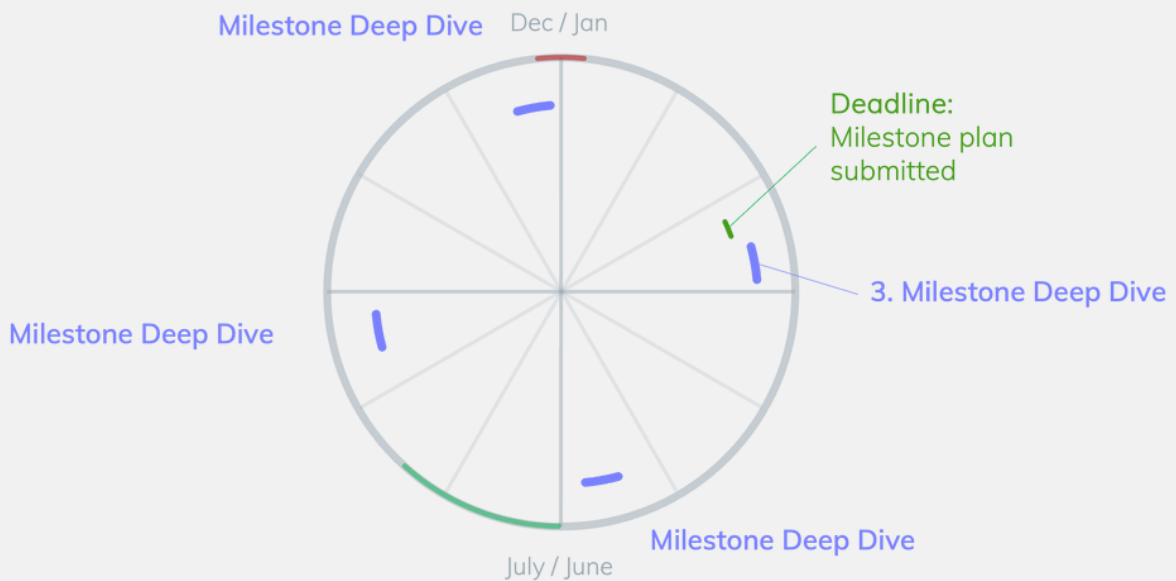
—
2. Strategy Stand Ups

Schedule 'Strategy Stand-Ups' throughout the entire year, either weekly or bi-weekly. These meetings are non-negotiable checkpoints that drive strict follow-up and ensure persistence in execution, helping every team to stay on course. They are your strategy's pulse points, ensuring that initiatives don't lose momentum or become sidelined. Facilitate focused discussions on Key Activities essential for achieving critical goals, maintaining a consistent commitment and visualizing collective progress and contributions. These gatherings are pivotal, empowering leaders to enhance engagement and accountability in navigating towards essential objectives.

Agenda:

- Key Activities that contribute to Company Initiatives are discussed
- Small adjustments of plan based on deviations and new information
- Discussion on risks / blockers from below
- Action via new Sprint Activity if needed

STEP 3: MILESTONE DEEP DIVES



Leader: CEO or Head of Function
 Participants: Management team + Initiative owners if needed
 Frequency: 3 hours quarterly
 Purpose: Reflecting and projecting.

A proactive planning session led by the CEO that reviews initiatives, evaluates milestones, and hold teams accountable. It emphasizes strategic interventions to support segments of the organization facing challenges. This meeting ensures that while the broader organization is focused on execution, the management team remains strategically engaged. Prior to these meetings, ensure that all relevant teams have detailed their milestones. Separate these sessions into retrospective and prospective analyses:

When looking ahead, critically assess all planned milestones. Quality trumps quantity—more activities don't necessarily mean better progress. Approve or challenge the milestones, and push teams to refine plans that are inadequate or falling behind.

When looking back, evaluate each initiative, focusing especially on those that are not meeting their planned trajectory. Decide on concrete actions for lagging initiatives and determine accountability for acceleration.

Agenda:

Looking back (1h):

- Review each initiative, focus on milestones
 - Focus on initiatives with low progress vs. plan
 - Add actions to management team members in sprint
- Increase frequency if needed

Looking forward (2h):

- Review each initiative
- Make sure to understand Milestones in plan
- Approve or challenge Milestones
 - Challenge teams with no plan, bad plan or very behind plan



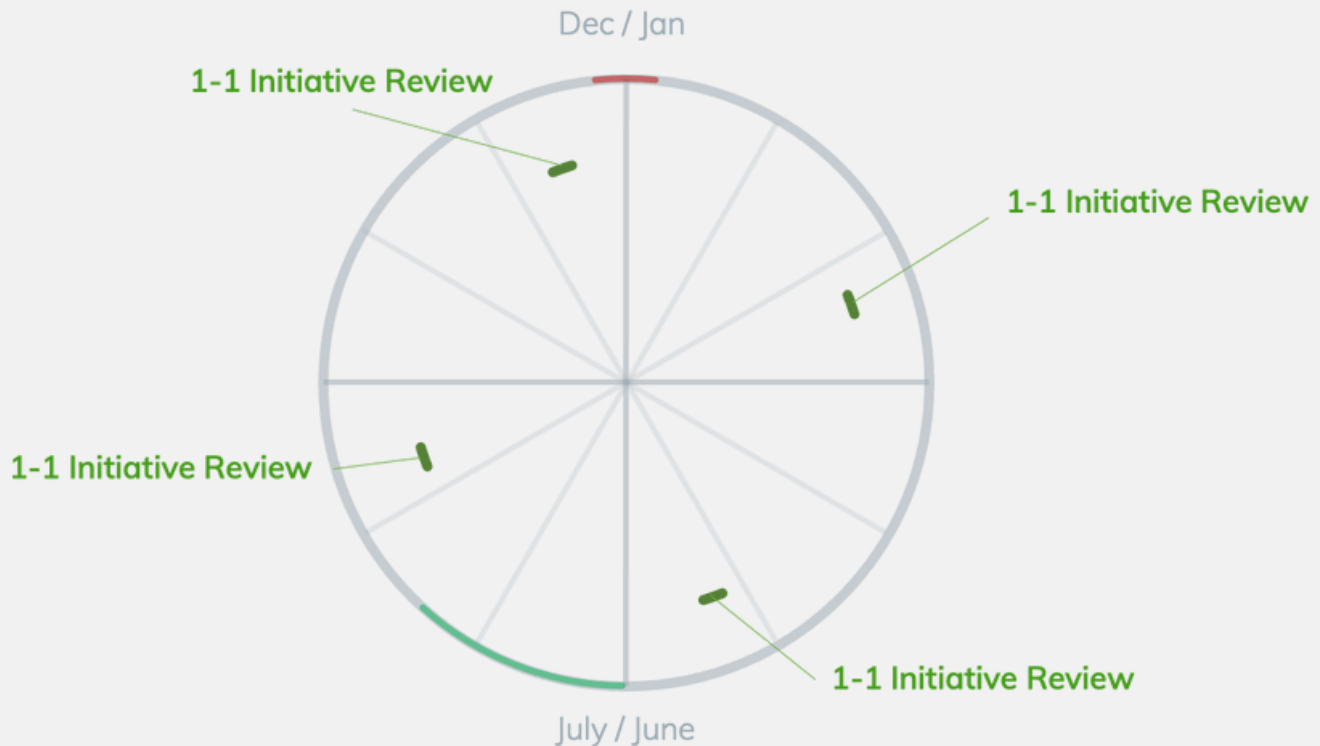
"The important thing is that there is a methodology and structure to both look forward, check the current situation and alignment, and at the same time take experiences from what we have done. That is when we elevate the organization from good to great."

Mattias Lindhe, CEO at Orbit One AB



STEP 4: 1-1 INITIATIVE REVIEWS

Integrated in normal 1-on-1



Leader: Manager

Participants: Direct report

Frequency: 30 min per quarter

It's imperative that leaders have scheduled quarterly one-on-ones with initiative owners. These discussions should be strategically templated to focus on the 'How' as much as the 'What' of the initiatives, ensuring alignment and addressing potential roadblocks directly.

Agenda:

- Discuss what direct report (with below organization) is currently doing to support company initiative
- Challenge/discuss quality of Milestones
 - Add Milestones if needed
 - Discuss and adjust deadlines
 - Support with rhetoric to drive engagement
- Discuss current blockers or risks
 - Escalate if needed



“Working systematically on initiatives and reviewing them monthly in our management team meetings allows us to identify shortcomings early on. These shortcomings might be because we either lack resources, don't have a shared perspective, or both. Yet, with Howwe, we discover issues sooner.”

Klas Franzen, CEO at IKEA
Industry Hultsfred

YOUR CHECK LIST



Before the new year starts, you have decided:

- Which Company Initiatives do we want to focus on?
- Which teams need to contribute?

Book below meetings in everyone's calendars before 2024 starts:

- Strategy Stand-Ups (all teams, weekly or bi-weekly)
- 4x Milestone Deep Dive per management team
- Communicate deadlines for milestone planning to each contributing team
- If needed: 1:1 with initiative owner

Navigating the Strategy Maze

Recognizing & Overcoming Common Pitfalls

In the swift currents of the modern business world, it's alarmingly easy for strategic planning to become an afterthought amidst the whirlwind of daily urgencies. The challenges are manifold: a lack of formal training in strategic thinking for key decision-makers, an over-reliance on delegation without maintaining oversight, and a culture that too often settles for 'good enough' rather than striving for excellence.

The Pitfall of Premature Delegation

The peril of premature delegation often results in strategic initiatives being sidelined. Senior leaders, while adept at crafting broad visions, may falter in the details that are the lifeblood of effective strategy. As a result, these strategies can become sidelined, not due to their lack of importance but due to a misalignment of focus and responsibility.

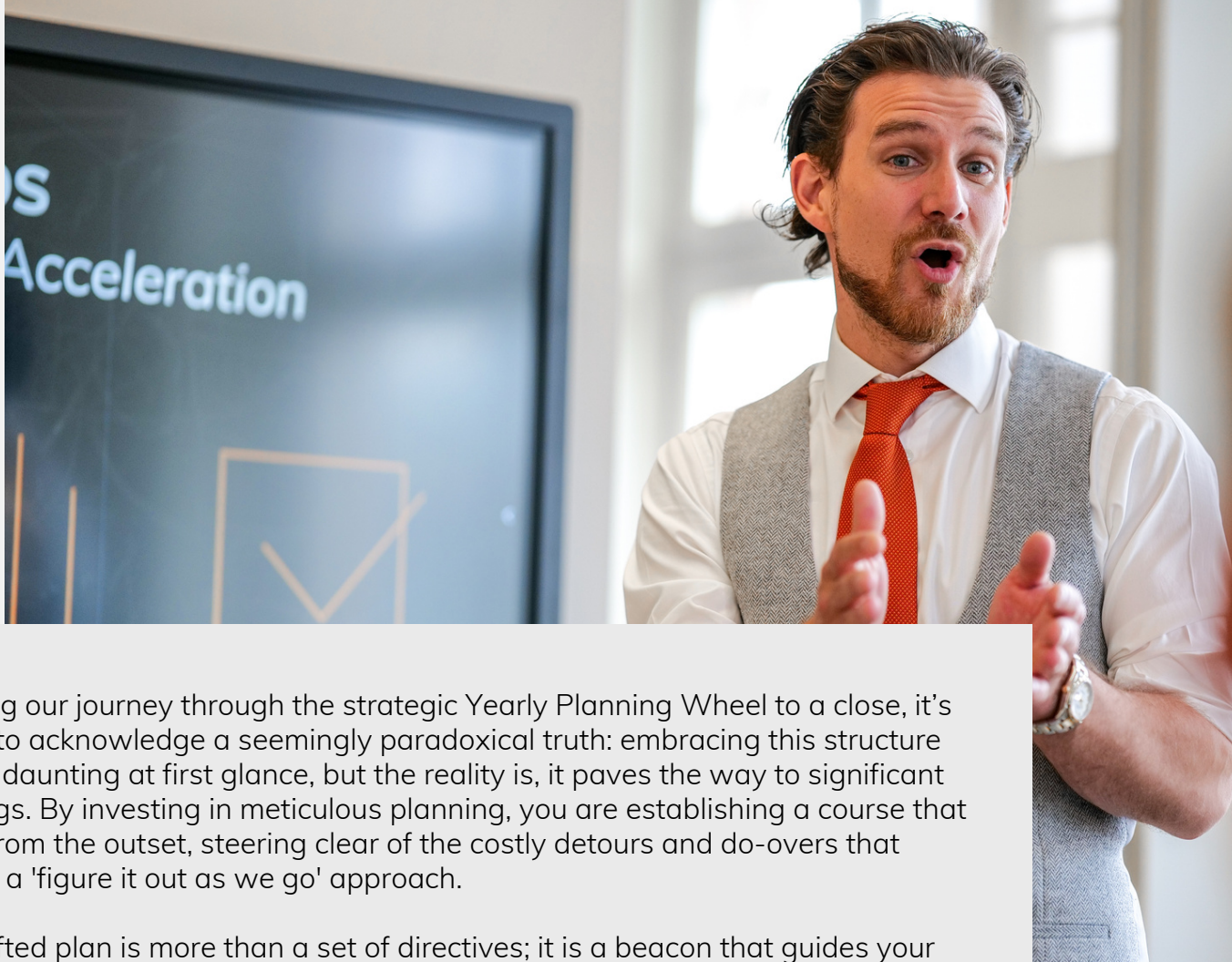
The Training Gap in Strategic Planning

It's a sobering fact that many in leadership positions have not been formally trained in the nuances of strategic thinking. When presented with complex plans, the lack of depth in understanding can lead to insufficient critical evaluation. This oversight means that strategic plans may not be utilized to their fullest, robbing organizations of the excellence they are capable of achieving.

Settling vs. Excelling

The tendency to accept what is 'good enough' rather than to pursue what is excellent can be a significant roadblock to realizing strategic potential. Settling for the status quo can stifle innovation and impede momentum, which is vital for a company's progress and success. To counter these challenges, it is crucial for organizations to engage deeply with strategic tasks and embed a culture that values continuous innovation and excellence. By doing so, businesses can steer towards a future that is not just successful, but one that truly reflects the realization of their strategic vision. This section aims to shed light on these common pitfalls and provide actionable insights to guide leaders in cultivating a robust strategic framework.





As we bring our journey through the strategic Yearly Planning Wheel to a close, it's important to acknowledge a seemingly paradoxical truth: embracing this structure may seem daunting at first glance, but the reality is, it paves the way to significant time savings. By investing in meticulous planning, you are establishing a course that is correct from the outset, steering clear of the costly detours and do-overs that come from a 'figure it out as we go' approach.

A well-crafted plan is more than a set of directives; it is a beacon that guides your teams with clarity and fosters a deep sense of commitment to the overarching goals. It's the difference between wandering in the fog and walking with purpose on a clear path.

As a tangible first step, secure your strategic future by booking the necessary sessions in your calendar for the entirety of 2024. The mere act of scheduling solidifies your intent and sets a concrete timeline for your ambitions. This isn't just an administrative task—it's a declaration of your commitment to excellence and foresight.

With these plans set, your teams are not left to question 'what comes next?' but can move forward with confidence, knowing that each step is a deliberate stride towards success.

So, with a calendar poised to guide your course and a structure designed to uphold your strategy, we bid you good luck. Remember, the Yearly Planning Wheel is ever-turning, and with each rotation, your strategy becomes more refined, your execution more precise, and your results more impressive. Here's to the future—a future you're not just predicting, but one you're actively and adeptly planning for.

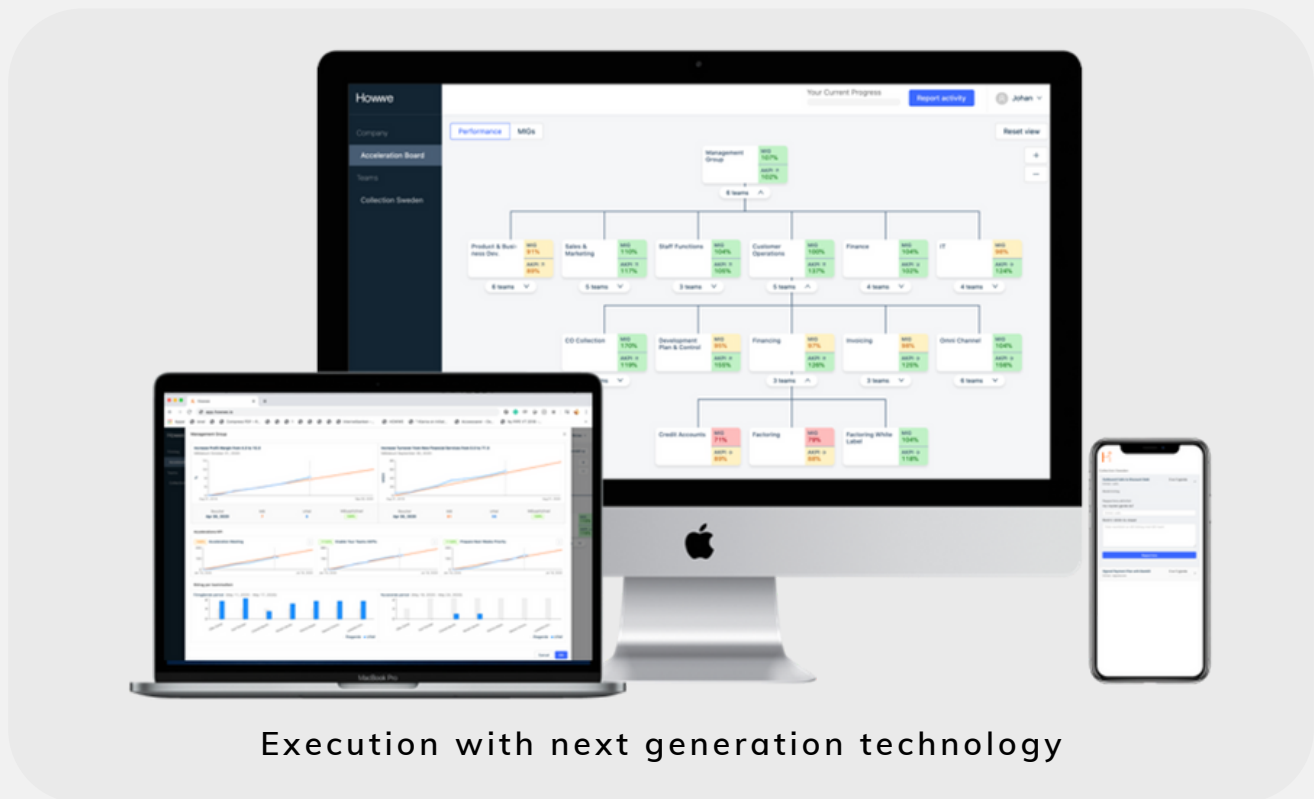
A HIGH-VALUE METHOD FOR SUCCESS IN STRATEGIC EXECUTION



This outline presents the four disciplines of the Howwe Method. When combined with the Howwe software, they simplify strategy execution and enhance financial results. These interconnected disciplines are essential for bridging the gap between strategy and execution, thereby reducing the 80% failure rate in meeting strategic initiatives on time.

[Ebook](#)
[Howwe Method](#)

BY SIMPLIFYING THE GROWTH JOURNEY, HOWWE IS HERE TO REDEFINE STRATEGY EXECUTION



Imagine executing every strategy as effortlessly as following a recipe. Howwe transforms complex growth strategies into clear, actionable steps for everyone, from the boardroom to the breakroom.

Just as GPS navigates us through unknown paths, Howwe acts as your business's digital roadmap. Merging a time-tested growth method with a user-friendly platform, it steers companies through corporate growth, reshaping how they operate.

Our mission is clear: bridge the strategy-execution gap with clarity and foresight. No more missed targets or deadlines. Envision a synchronized company, unified by best practices and empowered by digital precision. Amidst market upheavals, Howwe stands firm, enabling businesses to not just adapt but proactively excel.

In an era of endless data, Howwe simplifies growth. It's beyond digitalization—it's a pledge to clarity, ease, and unified progress.

Howwe is the Solution for Growth. With our method and software, we simplify the execution of your strategy.

[LET'S TALK](#)

Howwe[®]

SIMPLIFYING GROWTH

Learn more
[CEO Forum](#) | [Other E-Books](#) | [Howwe.io](#)