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# VALUE CREATOR'S TOOLKIT

Take a grip of your value creation

# What could Value Creators Toolkit do for you?

Assess it based on the statements below by giving a score from 1 to 4*	1	2	3	4
The strategy of our company is sharp and broadly understood				
Our company's priorities are crystal clear				
We see continuous and real strategic progress				
We have a strong understanding of how value is created				
We have continuous transparent visibility of performance				

\*1 – I disagree strongly, 2 – I disagree partly , 3 – I agree partly, 4 – I agree fully

**What does your assessment tell you?**

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# VALUE CREATOR'S TOOLKIT

TAKE A GRIP OF YOUR  
VALUE CREATION

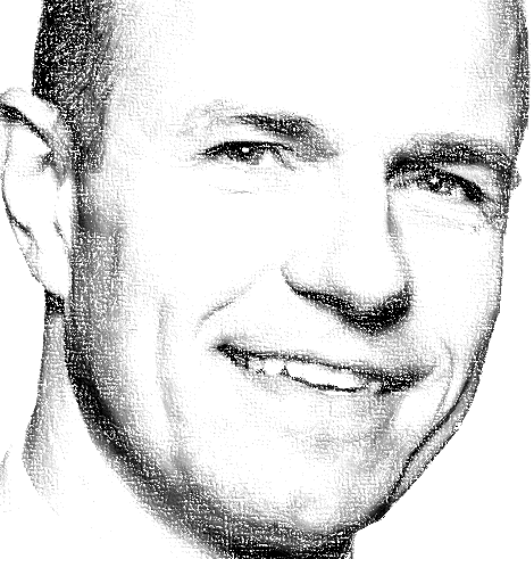
Strategy Onepager

Roadmap

Project portfolio

Financial scenario

Reporting



# The story behind Value Creator's Toolkit

I started working full time as a solopreneur in early 2016 and have worked on interim management and consulting assignments since. As I worked on assignments with a fairly short duration ranging from a few months to a

bit over a year, I recognized a repetitive pattern in my way of working. I realized it was the same pattern I had repeated over the years as an employed executive, but now I did it much more effectively due to the shorter assignment duration. I realized there is clear value in the pattern - a kind of backbone and red thread was being crystallized. I wrapped the parts into what I call Value Creator's Toolkit.

As such, there's little new in the parts. But as a complete concept, it provides a solid foundation for **strategy clarification, execution and value creation**.

Throughout my career, strategy and value creation has always been on the agenda. Growth, turnarounds, fundraising, mergers and exits. Realism and a tangible grip has been, and is important for me as the foundation for sustainable value. In the early days value was hidden in numbers, subsequently I realized value was generated in processes, until I learned that value is really generated by people. Obvious, isn't it?

People first, results will follow. With that shift in understanding value, followed a quite natural shift in how I approached leadership and development work.

Transparency and people engagement has since been my ultimate foundation. With a people oriented approach and Value Creator's Toolkit in my back-pack I know I'm standing on firm ground. ***It's been tested in multiple settings, leading up to solved challenges, profitable growth, raised funds and M&A.***

Value Creator's Toolkit can act as a foundation for your strategic leadership as well. It helps in aligning strategic understanding and contribution across the organization from specialists to Board of Directors. It ties together strategy, execution and financial understanding. ***It's a simple, and highly effective basis for continuous strategic dialogue.***

Enjoy!

Christoffer "Toffe" Wasastjerna

A hand is shown holding a black compass with a green face and red needle. The compass is open, and the hand is positioned palm-up. The background is a soft, out-of-focus sunset or sunrise over water, with warm orange and yellow tones. A dark semi-transparent banner is at the top right, and a larger dark semi-transparent banner is at the bottom containing the main title and subtitle.

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# STRATEGY ONEPAGER

Form a clear view of where to focus

## What do you do after all your strategic analyses is done?

Every company does them. The basic strategic analyses, using established tools such as PESTE analyses, Five forces analyses, Value chain analyses, Boston matrix, Competitive advantage analyses, Scenario analyses, SWOT...the list never ends, does it?

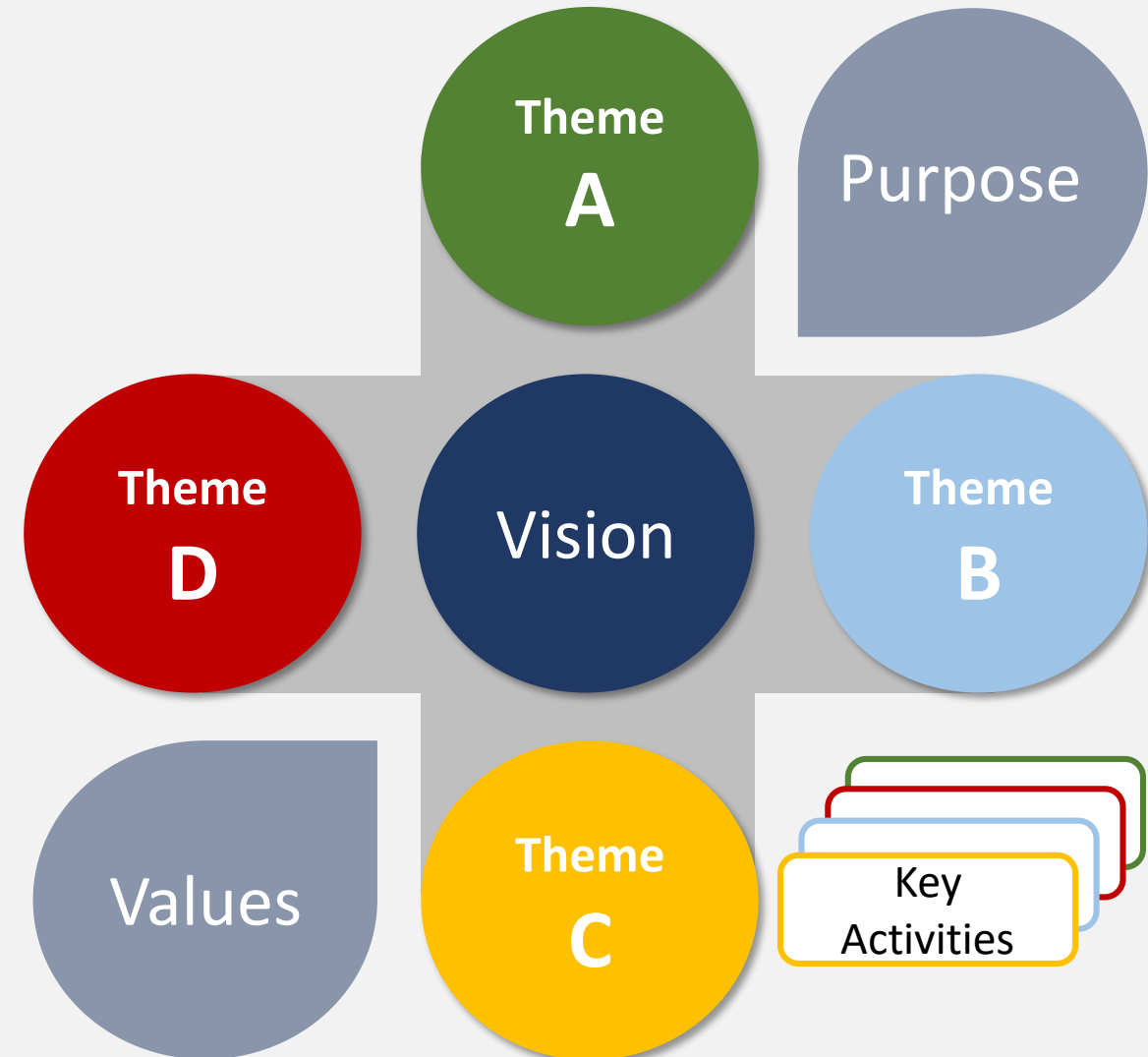
The problem is that, it still doesn't mean you have a strategy. In today's fast paced environment, in-depth planning for a distant future is wasted effort. Rather, you need a continuously evolving strategy that adapts to various signals and new insights, thus always being current. In addition, and most importantly, it needs to be sharp and broadly understood.

Still, rather few companies have a clear strategy that can be explained in just a few minutes by anyone else than the CEO of the company. Even s/he might say "...hmm, that's a long story..." or "...wait, I'll show you my presentation (+50 pages)...".

A strategy one pager serves that purpose. It's a crystal clear view of your strategy. It can be prepared today and it should evolve over time as additional analyses is done or key assumptions change. The end result should be simple and easy to understand. Ideally, all you should need when discussing your strategy, are the fingers and the palm of one hand, each representing the corner stones of your strategy.

If you can do that, so can a lot of people at your company. A shared understanding brings focus and enhanced execution capability based on a higher extent of self-steering.

## The concept of the Strategy Onepager





A close-up photograph of a person's hand pointing their index finger at a nautical chart. The chart shows yellow landmasses, blue water, and various navigational symbols like depth soundings and compass roses. The background is slightly blurred, focusing attention on the hand and the map.

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# STRATEGIC ROADMAP

Plan your milestones and KPI's

So, you have a strategy onepager – that’s a good start!

Your Strategy Onepager is a great aid for communicating and establishing a common view of where the company needs to focus and how people can contribute in driving in the right direction. But if your strategy is ambitious and transformational, you also need to create good momentum, right from the start.

This is where the strategy roadmap comes into play. It helps your organization in setting targets over the short term, guided by the big picture, to transform the company in the targeted direction. The roadmap helps in breaking down the elephant into bite size pieces. Plan your most important milestones and KPI’s\* for the immediate 3-6 month and 12 month periods, not more, just enough to provide clear direction and momentum. You'll have time to extend the horizon as you go and learn.

The roadmap sets the focus on immediate action and enables continuous and relevant dialogue. The roadmap is also a good reference to demonstrate your achievements to date - that's realized progress, which builds credibility in the eyes of key stakeholders.

*\*KPI’s require thorough understanding and prudence, so pay attention. Balance leading and lagging indicators.*

The concept of the Strategy Roadmap

Theme	Activity	Period 1	Period 2
A	<ul style="list-style-type: none"><li>A1</li><li>A2</li></ul>	Milestones & KPI's	
B	<ul style="list-style-type: none"><li>B1</li><li>B2</li><li>B3</li></ul>		
C	<ul style="list-style-type: none"><li>C1</li><li>C2</li><li>C3</li></ul>	<div><div></div><div></div><div></div></div> Status indicators	Milestones & KPI's
D	<ul style="list-style-type: none"><li>D1</li></ul>		<div><div>++</div><div>+</div><div>-</div></div> Progress indicators

└ Connected to Onepager!



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# PROJECT PORTFOLIO

Prioritize, Focus, Execute, Track

The clue behind effective strategy execution - The strategic project portfolio.

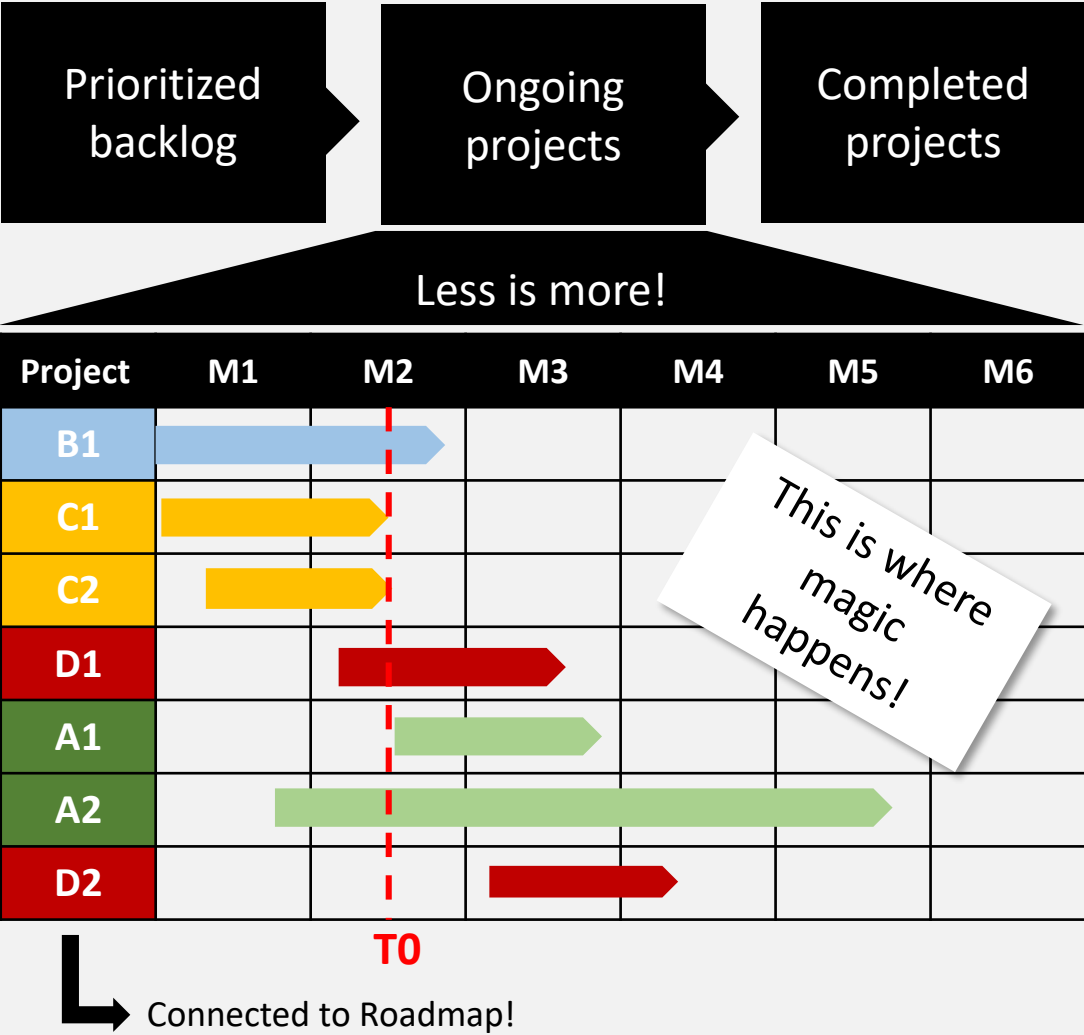
Your organization prepared the strategic roadmap, and has a fairly clear view of where to focus. Right? Now it's time to get those things done which will matter for the long run. So where do you start? Engage your teams in the following.

You need a grip of what’s going on in the first place. Where are all your resources consumed today? Prepare a high level project portfolio consisting of ongoing key activities and projects. Can these be clearly linked to your defined strategy? How do they relate to the roadmap? What impact will they have? Are your hands too tied with business as usual to handle strategically important initiatives?

Now deduct potentially missing/new strategic initiatives from the strategy roadmap, to add to the project portfolio. Perhaps some initiatives can be consolidated? Do you see now, where your priorities should be and any obstacles standing in their way? Perhaps some ongoing initiatives simply need to be dropped?

Continuous prioritization is the key to success. Prioritize, focus, execute and track. Keep it up and you'll see your strategy come alive project by project.

The concept of the Strategic Project Portfolio





A close-up photograph of a child's hand holding a stack of coins. An adult's hand is shown adding another coin to the stack. The background is blurred, showing a red object and a white surface. The overall scene suggests a financial or educational activity involving money.

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# FINANCIAL SCENARIO

Understand financial implications and value

## The financial scenario - the key to understanding funding needs, value creation and valuation.

Many find it hard to connect strategy to financials, or do it on a very general level, failing to tap into the business model and earnings logic. Usually the outcome is a hockey stick curve that doesn't connect to any reality. The track record is at best broken promises.

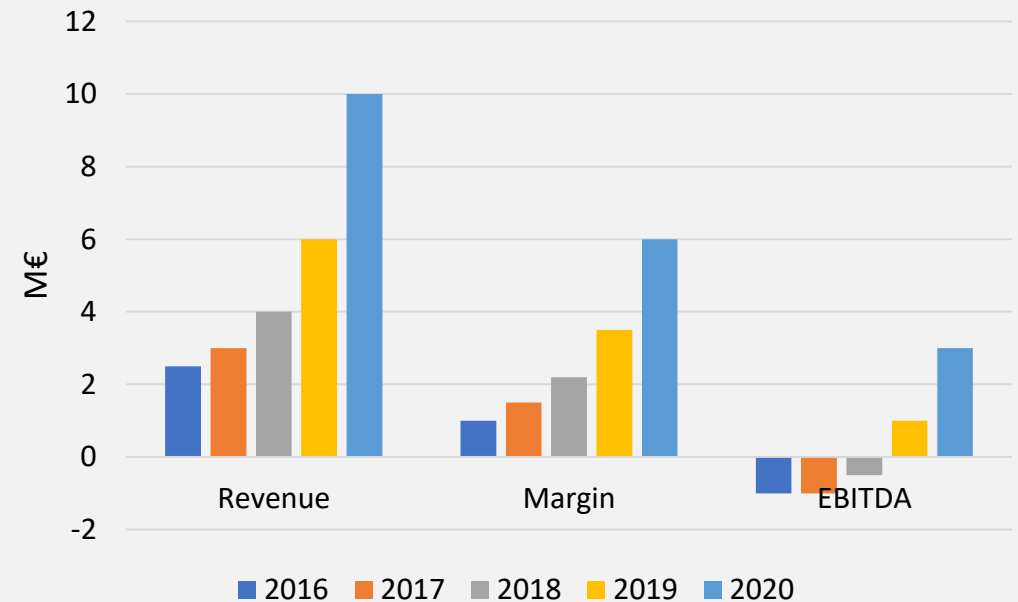
However, if you do it properly, you will get a decent barometer that builds on key value drivers and indicates the dept and duration of your death valley, funding needs, the scale up phase, the break even point, the long term growth and profitability development. All of that supports your understanding of how you build value and adds to your credibility. That's especially useful when discussing fundraising, acquisitions or exit.

The value drivers should with preference be used for continuous performance measurement (KPI's), to understand how the business is performing compared to the modeled strategy. Vice versa, the model should be regularly updated to reflect the reality.


A strategy paired with a thorough financial understanding supports sustainable value creation.

## The concept of the Financial Scenario

- Which are the key drivers of our business model?
- How is the strategy expected to impact those?
- Where does that take us financially?



- Does it require investments?
- What about financing?
- When are we expecting to reach break-even?
- What is our value and what are our shares worth?
- What could be the best time to pursue an exit?



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# REPORTING PACKAGE

Provide for your boards contribution



## Transparent Board reporting helps your Board to contribute and add value.

Almost everyone dislikes reporting. Yet, without reporting, it is hard to communicate effectively. It's part of enabling transparency. If you're the CEO, you typically have the toughest reporting challenge for yourself. You need to be able to see the full picture and also effectively communicate it to your teams and your Board of Directors. Still information overload isn't appreciated by anyone.

Yet, it's common that boards of directors are served thick report decks, with random content from meeting to meeting. How are directors supposed to be able to contribute to the strategic development if that's the case?

So what you need is a well structured basic reporting deck, that supports your leadership and allows you from time to time, to emphasize what matters. Some parts can be dynamic and change from time to another, while others need to demonstrate your strategic consistency and determination. If your reporting is good, your teams and Directors will be able to contribute their best. That's a nice reward for the effort.

## A well structured report includes f.ex. these sections:

1. Executive summary
2. Questions and decision proposals to BoD
3. External view (Trends, Competitors, Environment etc)
4. Customers
5. Products & Services
6. Operations
7. People
8. Strategy execution review
9. Finance
10. Risk assessment

Are you brave enough to transparently share the report with your organization as well?

The point being – consistency and relevance of the provided information. If there aren't changes from the previous report – state so and leave out redundant pages. Focus on opportunities & threats, changes & issues. Keep the package concentrated and strategic!

Expect your BoD to come prepared to meetings, and discuss rather than listen to your presentation. Turn board meetings into a valuable asset!



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# AGILE STRATEGY EXECUTION

A new modus operandi

## Agile strategy execution - a new modus operandi

As we know, even the best strategies are tough to execute. Study after study keep repeating this and I'm sure you have your own experiences as well. So do I. We also know that strategy execution typically fails already at the very initiation of planning. Why? Well, simply due to top-down approaches with low engagement of the people who will actually be involved in executing the strategy.

Engaging people across the organization early in the process is key. This needs to be rooted in the culture - not a one-off trick. People need to feel they were heard and even better if they can see their own finger prints in the strategy. Engagement also works as initial validation for the strategy - if people "buy in", there is likely value in the strategy. This creates the momentum required to move even mountains if required. But in order to maintain that momentum you also need a continuous process - a new modus operandi.

If you are familiar with software development you already know the answer. Agile development methodology can be applied to overall strategy execution as well. Base your strategy execution on an iterative process made up of sprints and releases. Think of the company as continuously developing software - every release comes with enhanced and new features that add value to customers. The company adds value to various stakeholders as well by delivering on its strategy.

Anchor the release cycle to the periods in the strategy roadmap. A release schedule with a suitable frequency helps maintain focus, momentum and measure progress and results, while also enabling adaptation to changing circumstances. Further, define the length and number of sprints for the release cycle. Find a natural sprint length, that provides sufficient time for the nature of the specific tasks.

Does it sound tedious? Focused execution requires discipline. It's easier if you integrate and align the process with your board of directors and management team meeting cycle and other regular events. The second reason strategy execution fails, is due to lost focus and momentum. If you can adopt the above rolling process and keep up with it from month to month, quarter to quarter and year to year it becomes your natural modus operandi. Strategy will become a natural and continuous dialogue in your company, which will significantly improve the odds to succeed with transformation initiatives.

## ...a few steps more (note, this is team work):

**Release planning:** Plan your release scope. What milestones and achievements do you target for the upcoming release? Often less is more. What should your defined KPI's measure at the end of the release cycle? Do you see how the strategic roadmap and the project portfolio supports this?

**Sprint planning:** Plan the closest two sprints. The first one in more detail, the second roughly. Repeat after the first sprint. Roll on. Here we're working with the project portfolio. Prioritize, focus, execute, track.

**Sprint meetings:** Gather your team regularly to follow-up, provide guidance and help solve any obstacles. Keep the momentum. Again, we're working with the project portfolio.

**Sprint retrospective:** Do sprint reviews at the end of each sprint. Discuss how you performed and what you learned during the sprint. What will you take along for the next sprint. Continuous learning. Go back to step 2 and roll on until your release is completed.

**Release review:** How much did you reach of the planned release scope? Decide what still needs to be completed, if necessary. Close the release. Celebrate the achievements! Communicate to relevant stakeholders (organization, customers, board, etc)! The roadmap already indicates clear strategic progress.

Now, what is stopping you from excelling in strategy execution?

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# EXECUTION PITFALLS

Avoid these traps!

# Strategy execution pitfalls to avoid

The following issues are some that I have encountered during my own journey and found to be key reasons why execution can be a pain. Do you recognize any of them? Which are OK in your company? Which need attention?

## Strategy:

- ❑ There is no strategy. The business lacks a clear direction, or it changes with the wind. Business goes on, until there's a crisis.
- ❑ The strategy is static. It was enforced some years ago. Continuous strategizing is missing and the strategy fails to capture changes in the environment. Business goes on, until there's a crisis.

*Continuous strategizing leads toward continuous renewal.*

## Planning:

- ❑ Engagement is missing. The strategy is planned between the BoD and CEO (potentially incl. management team). As participation is limited the collective wisdom of the organization is left unutilized and broader commitment is not built during the process.
- ❑ The strategy is not summarized. Extensive analyses is not followed through by summarizing the strategic cornerstones. The strategy remains fuzzy and does not contribute to forming a unified view.
- ❑ The operationalization is missing. The strategy is not made actionable through targets and activities. How to get from thought to action?
- ❑ Ownership and accountability is lacking. This is largely a matter of culture. But also resourcing shortages and overestimation of capacity can lead to issues.
- ❑ Financial conflict. Budgeting may prioritize short term financial performance. This easily gets the hold of leadership.

*An engaging culture enables broad accountability.*

## Execution:

- ❑ Central competences and capabilities in leadership and execution are lacking or their importance is underestimated. Many other issues flourish.
- ❑ The leadership culture is not empowering. However much talk there is, people find it hard to connect and find positive energy.
- ❑ The organization structure does not support. The strategy may require different ways of working than what the organization structure enables. Silos rule.
- ❑ Lacking transparency. Information does not flow naturally. There's little information about how well the strategy is executed throughout the organization.
- ❑ There's no natural process nor tools for leading execution. Execution becomes a tough push exercise coupled with extensive reporting. That won't endure.
- ❑ Lack of continuous strategic dialogue. Whereas culture eats strategy for breakfast, so does business as usual. The strategy does not get leveraged and the tie to the vision and purpose of the business remains vague.
- ❑ Execution is not paced at a suitable rhythm. After initial launch, the strategy slowly fades. Milestone achievement is not celebrated. Momentum is not maintained.
- ❑ Lack of prioritization. Trying to do more than there's resources for. Nothing proceeds as it should.
- ❑ Lack of understanding of the nature of the various development and change needs. Low ability to create the right conditions for effective execution.

*Leadership culture matters.*

## Measurement and rewarding:

- ❑ Strategically irrelevant measurement. Other things are measured.
- ❑ Rewarding is based on other criteria than strategic progress and achievements.

*You get what you measure and reward. A sincere "Thank you" goes a long way.*





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Last words!

# VALUE CREATOR'S TOOLKIT

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## Which benefits do you think Value Creator's Toolkit could provide for you?

- ✓ Provide direction to the operations ☐
  - ✓ Align the co-operation across the organization and board of directors ☐
  - ✓ Accelerate the strategic development ☐
  - ✓ Clarify value creation and value ☐
  - ✓ Facilitate availability to funding ☐
  - ✓ Support a rewarding exit ☐
  - ✓ What else? ☐
- 

## Thanks for reading!

When you need to clarify your strategy and want to move into execution and value creation mode, please contact me.

You can reach me on [toffe@capwise.fi](mailto:toffe@capwise.fi) and +358-400-684860. I'm fluent in English, Finnish and Swedish.

Get to know me better:

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