

DATA STRATEGY TOOLKIT

Strategy Workshop Kit

Three leadership workshops that turn the business strategy into a data strategy and a scorecard

THE SO WHAT OF THIS DECK

Run the workshops in sequence to agree themes, the strategy map and the use-case portfolio, and leave every session with named owners and dates.

The workshop series

Half a day each, two weeks apart, the same core group.

1

Workshop 1: Strategy to map

Confirm vision, choices and themes; build the strategy map; find where data enables it

2

Workshop 2: Data objectives and portfolio

Write data objectives, set the offence and defence posture, rank the portfolio

3

Workshop 3: Scorecard and commitments

Agree measures, targets, owners, gates, forums and the first 100 days

SO WHAT

Three half-days, two weeks apart, produce the map, the data objectives, the scorecard and the commitments.

Who attends, and their role

Participant	Role in the room
Executive sponsor	Opens, frames the ambition, breaks ties
Theme owners	Own objectives and measures; commit people
Head of data	Brings the baseline and portfolio; owns the plan
Finance partner	Tests value, baselines and funding
Facilitator	Runs the process, keeps time, stays neutral
Note-taker	Captures decisions and actions live

Workshop 1: strategy to map

Time	Session	Output
0:00	Vision, mission and choices: playback and challenge	Confirmed cascade top
0:40	Themes and owners	Three to five themes with owners
1:20	Build the strategy map in four perspectives	Draft objectives
2:20	Draw and test the cause-and-effect links	Linked map
3:00	Mark objectives that depend on information	Data hot spots
3:30	Decisions and homework	Decision log

Workshop 2: data objectives and portfolio

Time	Session	Output
0:00	Data hot spots to data objectives	Five to six data objectives with map IDs
0:50	Posture: offence and defence	Agreed balance and why
1:30	Use cases: value at stake and feasibility	Scored long list
2:30	The cut line and the not-now list	Ranked portfolio
3:15	Shared data products	Build-once list
3:40	Decisions and homework	Decision log

Workshop 3: scorecard and commitments

Time	Session	Output
0:00	Measures for each objective: lead and lag	Draft scorecard
0:50	Baselines, targets and owners	Committed targets
1:40	Initiatives and stage gates	Funded first tranche
2:20	Forums, decision rights and rhythm	Operating model
3:00	First 100 days	Plan with owners
3:30	Strategy on a page	Agreed one-pager

Exercises that work

Test the arrows

For each link on the map ask: what evidence says this causes that? Weak links become review hypotheses.

Pre-mortem

Two years on, the strategy failed. Why? Turn the answers into risks and leading measures.

Posture vote

Each leader places a dot on the offence to defence line; debate the spread, not the average.

Value vs feasibility

Place each use case on the matrix; debate only where scores disagree.

Measure or opinion?

For every proposed measure: could someone else reproduce it next month?

Not-now list

Agree explicitly what the strategy will not do this cycle.

Internal or external facilitator?

Choose internal when

- The group works well together
- Topics are not contentious
- You have a skilled, neutral facilitator

Choose external when

- Strong views or politics are in play
- Past sessions did not reach decisions
- You need everyone, including the data lead, to participate

Decision log

Decision	Rationale	Owner	Due
[Decision]	[Why]	[Name]	[Date]
[Decision]	[Why]	[Name]	[Date]
[Decision]	[Why]	[Name]	[Date]
[Decision]	[Why]	[Name]	[Date]
[Decision]	[Why]	[Name]	[Date]
[Decision]	[Why]	[Name]	[Date]

SO WHAT

Publish the log within 24 hours; a decision not written down was not made.

Follow-up and follow-through

- Send the decision log within 24 hours
- Confirm owners and dates individually
- Show the first visible action within two weeks
- Start the monthly scorecard review straight away