STRATEGIC AGILITY: STRATEGY SIMPLIFIED AND DELIVERED

Strategy, OKRs & Portfolio Management

G-Cloud 15 Service Definition Document

1 ABOUT JCURV

JCURV OVERVIEW

Our mission is to increase the agility of organisations so they can thrive in an increasingly uncertain world

Our clients are a diverse range of industry leaders

INDUSTRY RECOGNITION

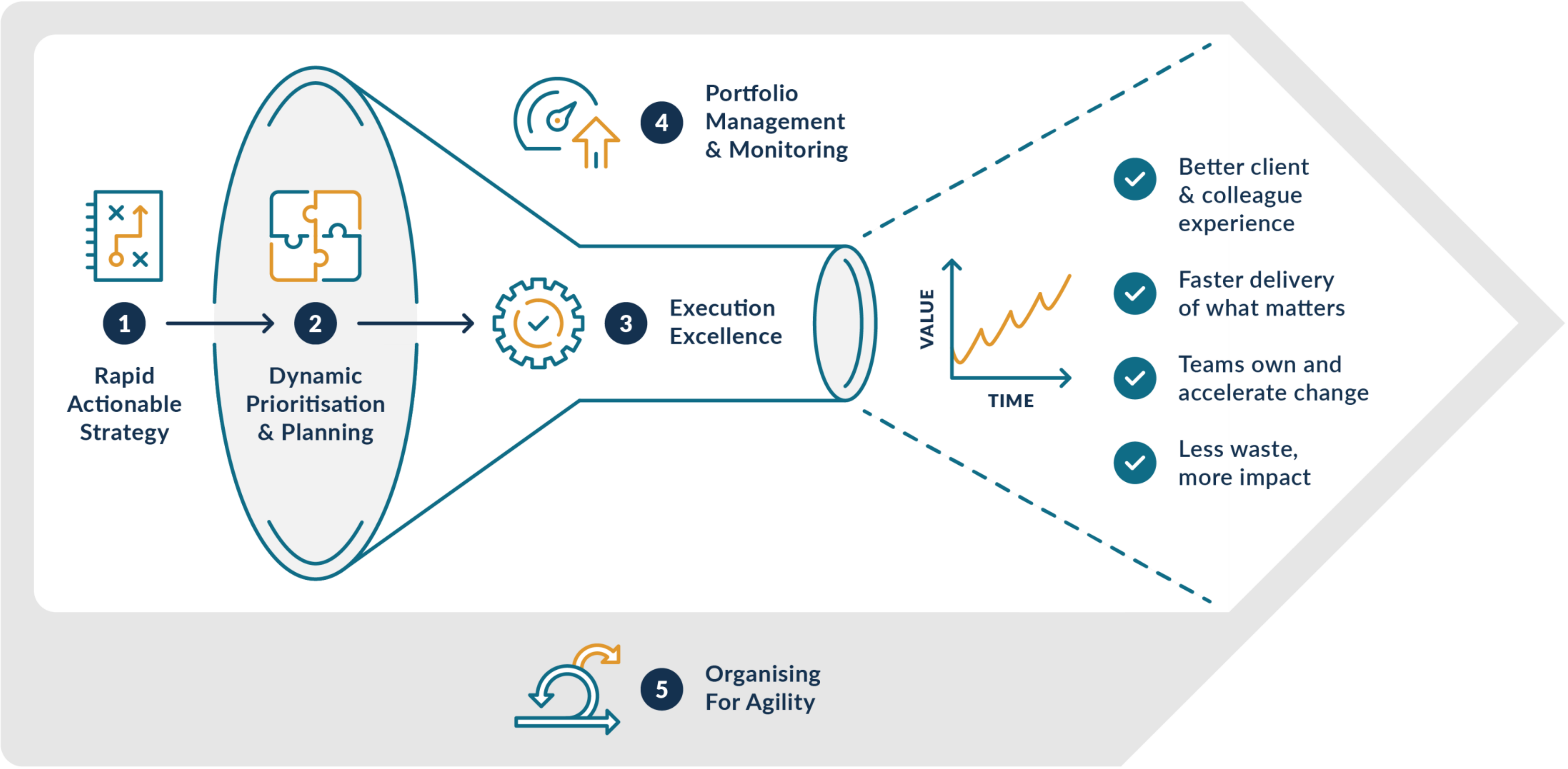
UK'S LEADING MANAGEMENT CONSULTANTS 2025

BEST TECHNOLOGY CONSULTANT 2024

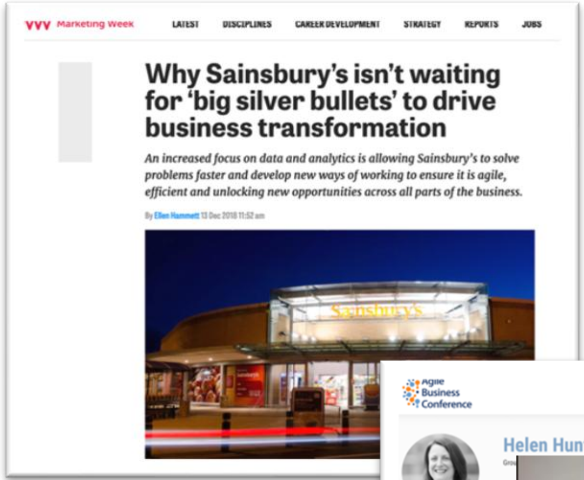
BEST PEOPLE AND LEADERSHIP CHANGE 2024

BEST NEW CONSULTANCY

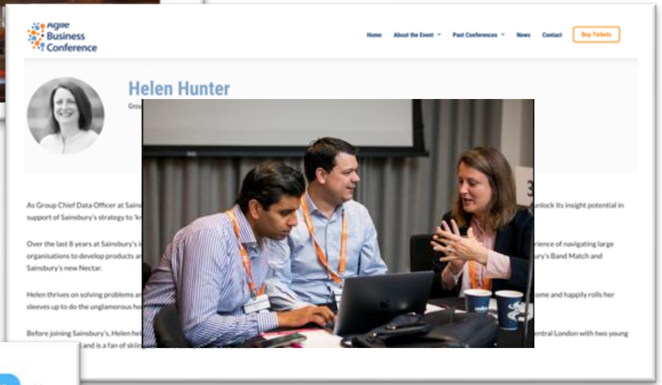
WE HELP EXECUTE YOUR STRATEGY, END-TO-END



MEDIA RECOGNITION

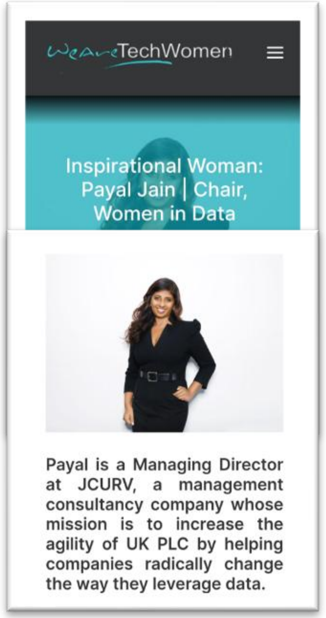


Article on the Agile transformation undertaken in DACE in Marketing Week



JCURV's client presented at the Agile Business conference about Sainsbury's Agile journey

Agile in Data conference presentation at the '2018 Women in Data' conference by JCURV's client



JCURV's Payal Jain recognised as an inspirational role model by WeAreTechWomen.

Article on some insights from our 3rd State of Agile Culture Survey, with perspectives from our Founder Vikram on how organisations and leaders can respond.

JCURV's Vikram Jain discusses findings from our recent State of Agile Culture report on Ian King Live

JCURV's Payal Jain joined MPs and other female leaders at 10 Downing street for International Women's day

2 STRATEGIC AGILITY:

STRATEGY, OKRs & PORTFOLIO MANAGEMENT

STRATEGIC AGILITY: STRATEGY, OKRs & PORTFOLIO MANAGEMENT

We help leaders design an iterative strategy, enabled by agile portfolio management to monitor performance and continuously improve

CLIENT CHALLENGE

- The rate and complexity of change has dramatically increased, yet traditional strategy development still typically runs on annual cycles, using long-winded non-standard documents which are time-consuming to develop
- In terms of execution, traditional PMOs are not set up for this level of change and are struggling to adapt their approaches and capabilities
- As a result, there is often a lack of alignment between strategy and execution and organisations are overwhelmed with priorities, impacting customer outcomes, company performance and staff engagement.

WHAT WE DO

JCURV helps business leaders design a concise, engaging and executable strategy, supported by agile portfolio management practices to monitor progress and performance and continuously improve delivery capability.

We support clients with:

1. Designing a “Minimum Viable” Strategy and defining strategic Objectives and Key Results (OKRs) to execute it, driving focus, transparency and alignment
2. Establishing a high-performing Lean Portfolio Office focused on strategy execution:
   - Building a prioritised portfolio of work developed in line with strategic drivers identified
   - Implementing agile governance to coordinate delivery of the business strategy, including agile budgeting and funding guardrails and guidelines
   - Measuring delivery performance through cascading OKRs from the Exec through to delivery teams and upskilling teams in their use
3. Developing internal capability across the organisation to support agile delivery best practice and consistently improve ways of working.

OUR PERSPECTIVES

- Why traditional PMOs are stuck on ‘red’
  – *Whilst organisations are reinventing their approaches to thrive in an increasingly uncertain world, in many cases PMOs remain untouched and under-invested. Adopting agile principles and capabilities drives revenue growth and higher customer satisfaction. Discover our insights here.*
- An agile approach to future-proof your business strategy
  – *In a constantly changing world, traditional approaches to strategy development can prove less valuable and riskier. An iterative, test and learn approach enables you to better adapt to the business environment. Learn more here.*

2.1 STRATEGY SIMPLIFICATION & OKRs

STRATEGY DELIVERED

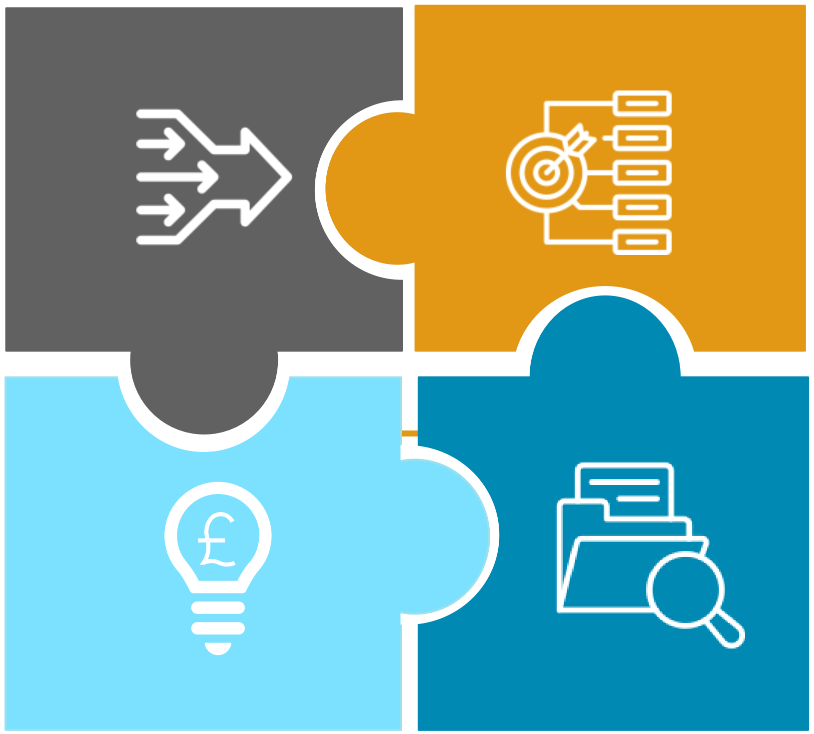
Four key capabilities to ensure you bridge the Strategy Gap and achieve business results

Strategy Simplification

- Rapid design workshop to **map, stream and align** all strategic plans and processes
- A single view of organisational **strategic cadence** enabling a leaner and more agile approach to governance
- A **Minimum Viable Strategy** canvas that is memorable, engaging and impactful

Objectives & Key Results

- Leadership OKR-Setting to ensure **shared understanding of strategic intent** and **tough prioritisation**
- Team OKRs to **uplift performance** and improve employee meaning
- Alignment of objectives across the organisation creating **clear traceability of work to strategy**
- Quantifiable results that **measure outcomes** and performance-oriented behaviours



Lean Portfolio Management

- Ensuring all **change initiatives align to strategic objectives**
- Move from traditional project funding inefficiencies to lean **funding of strategic theme or product group**
- **Streamlining ideation to initiative** enabling a rapid response to new market opportunities

Agile PMO

- Enables and drives **data-driven decision-making** through the portfolio and delivery flow metrics and automated tooling
- Manages **funding guardrails** to support reallocation of funding for new opportunities and innovation
- Leads with an **outcome-based and supporting mindset** versus monitoring, reporting and control

OBJECTIVES & KEY RESULTS (OKRs)
A lightweight framework that delivers maximum strategic impact

95% of employees are unaware of, or don't understand their organisation's strategy. From working with **100+ organisations**, we have a tried and tested lightweight framework and approach for embedding OKRs into the drum beat of your business. This ensures not only does everyone understand strategic goals, leaders and teams are clear how work is contributing, and success is being measured.

OKR you ready?

- Rapid-fire strategy review
- Strategic priority capture or definition
- OKR readiness assessments
- Defining enterprise OKRs with executive leadership
- KPIs v. OKRs analysis

Note: Strategic Readiness is suitable for organisations that have a simple strategy design and management process, We recommend our Strategy Simplification rapid design workshops for complex, traditional strategic planning processes.

Training & Coaching

- OKR health checks and diagnostics
- OKR role-based training, learner pathways and accreditation
- Facilitating annual and quarterly OKR-Setting workshops
- Creating your OKR playbook
- Coaching your internal champions to lead and drive OKR maturity

Tooling & Automation

- Configuration of leading OKR tooling to capture, measure and managed strategic alignment and delivery.
- Integrating the tool with the broader business portfolio and delivering management tools (JIRA etc).

Culture & Change

- Establishing and enabling a motivated OKR Champion network
- Change approach to focus on:
  - Outcomes over outputs
  - Overcoming resistance to transparent metrics
  - Reducing non-priority work
  - Creating cultural safety for 'moonshot' OKRs to maximise outcomes

THE BENEFITS OF OKRS

RETURN ON INVESTMENT

DATA-INFORMED DECISION MAKING

REDUCING RISK

TESTING YOUR STRATEGY EARLY AND OFTEN

26%
Increase in ability to align teams

22%
Increase in ability to execute

28%
Increase in ability to focus

34%
Increase in ability to track progress

Source: Survey of 466 NewtonX verified experts in organizations using OKRs by Quantive Results Global State of OKRs 2023 Report.

2.2 LEAN PORTFOLIO MANAGEMENT & AGILE PMO

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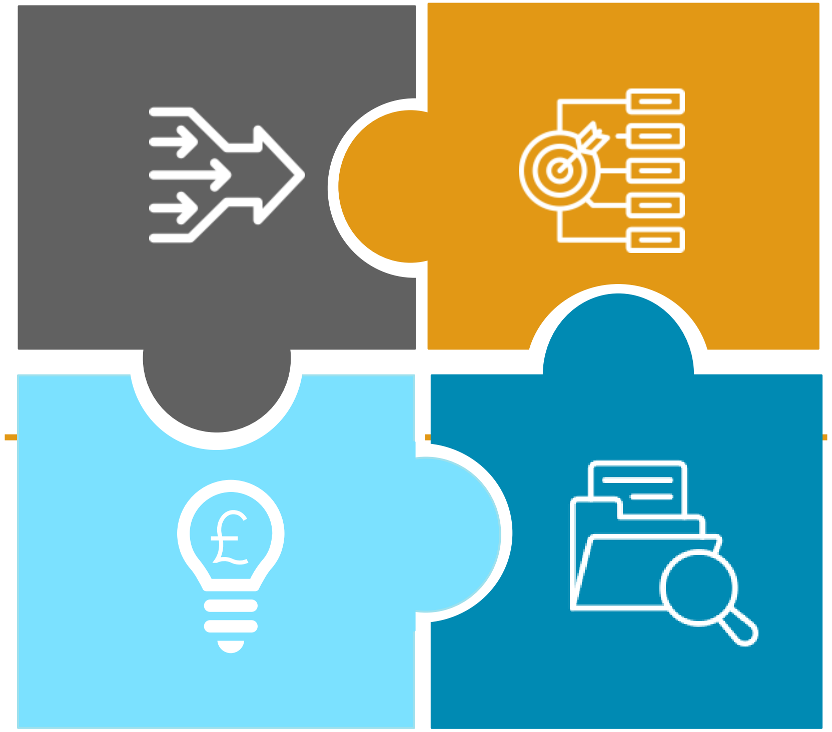

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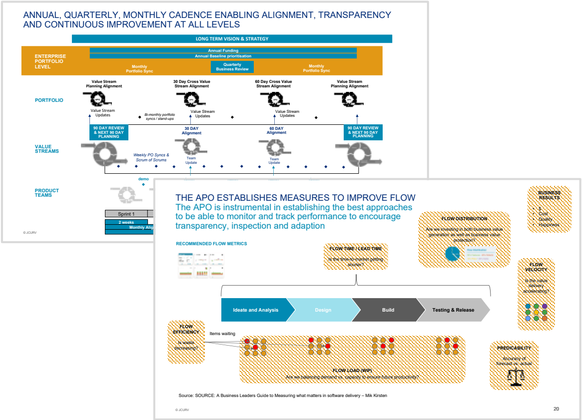
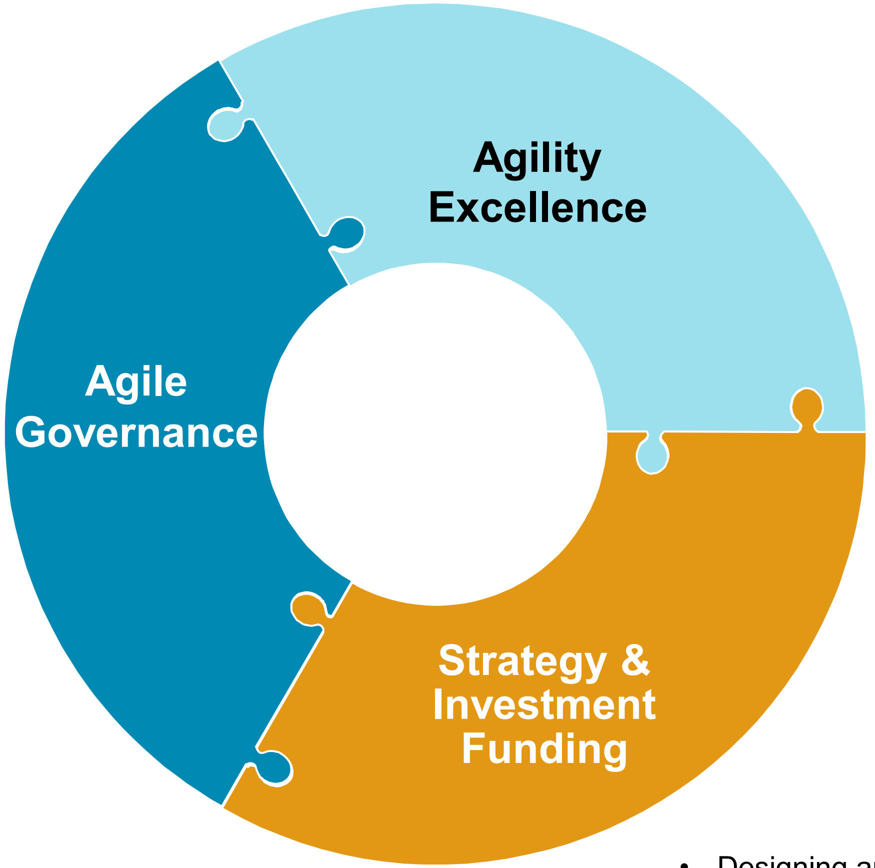
WHERE WE BUILD SYNERGIES WITH LEAN PORTFOLIO MANAGEMENT AND HIGH-PERFORMING AGILE PMOs

Agile Governance

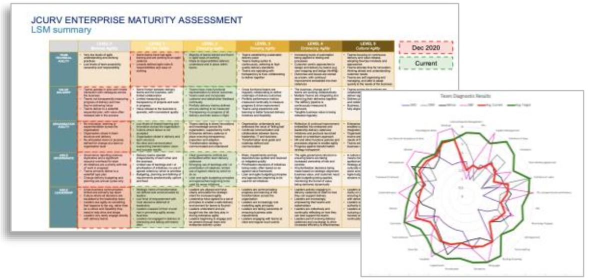


- Supporting set up strategic governance cadence from Exec to delivery team
- Establishing quality performance measures and tooling to make it transparent to all.

Jira
Azure DevOps
Mural
miro
Lucidspark
Planner
Teams

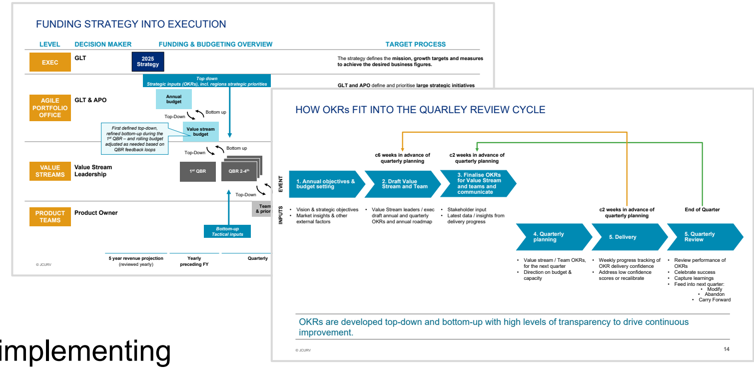


Agility Excellence



- Support defining business agility strategy and running maturity assessments
- Establishing communities of practices and upskilling key stakeholders.

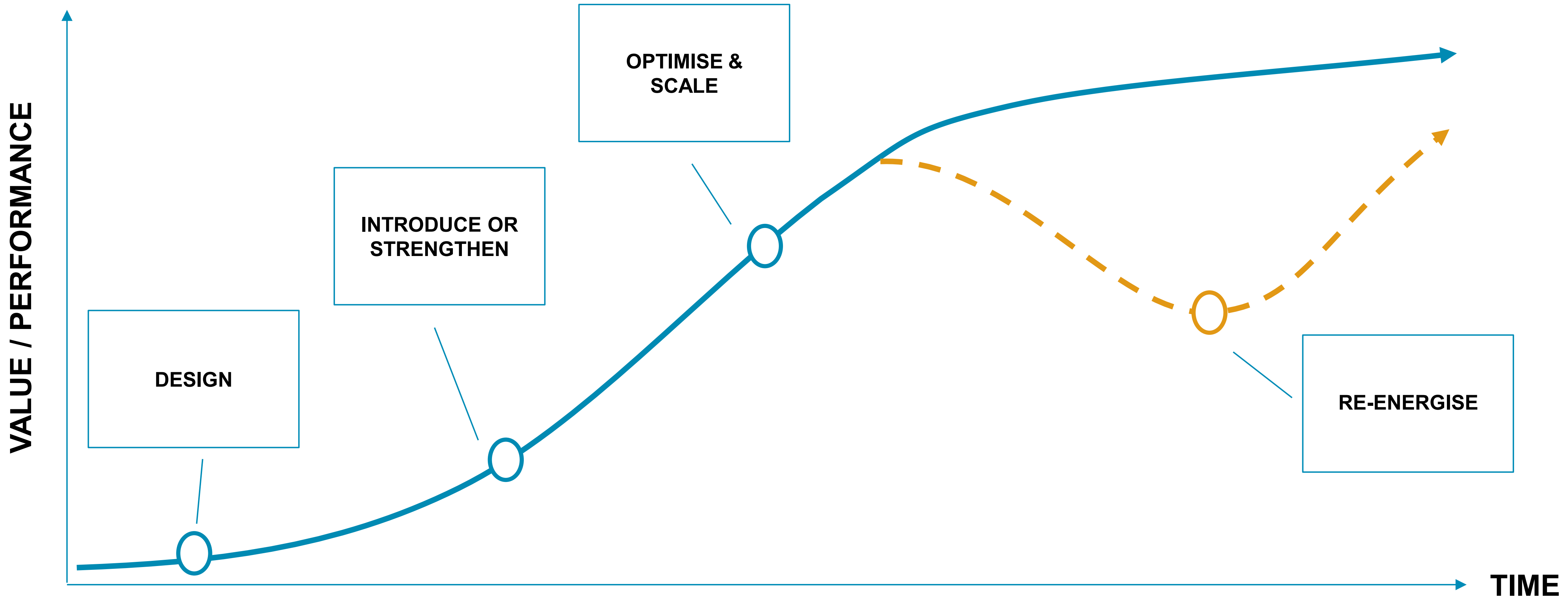
Strategy & Investment Funding



- Designing and implementing strategic cascade methods from Exec to deliver teams
- Establishing agile budgeting methods
- OKR definition and cascade and the system to review them.

WHERE WE BUILD SYNERGIES WITH LEAN PORTFOLIO MANAGEMENT AND HIGH-PERFORMING AGILE PMOs

We help design, build, scale or recover PMOs to maximise the value the business delivers



3 WHY JCURV

EXAMPLES OF WHERE WE HAVE SUPPORTED CLIENTS WITH THEIR STRATEGIC AGILITY

Delivering the 3-year business strategy for one of UK's largest supermarket chain

- Faced high inflation, changing consumer needs, increased competitor pressure
- Dealing with bureaucracy, slow decision making and speed of execution and reactive
- 3 years strategy to deliver £500m of additional profit from new propositions and loyaty scheme to labour / cost optimisation
- Worked with the Board, Exco and delivery teams to mobilise 12 strategic initiatives
- Used agile principles to deliver value iteratively and then scale up solutions.

Key Results:

- £1bn in **incremental profit delivered**
- Increased **staff engagement by 21%**
- **Over-delivered** within the first 12 months
- Over **1,000 colleagues upskilled creating sustainable capability.**

Defining OKRs and 18 month change strategy for an energy and utilities company

- Ambitious growth plans meant that a clear and prioritised change roadmap was needed
- Teams had been working independently without an aligned view of strategic goals and initiatives
- Identified business priorities through individual interviews and multiple leadership workshops
- Sized and value scored all outcomes to check alignment with strategic and growth goals
- Designed OKRs & governance approach which prioritises new initiatives based on value

Key Results:

- **One-year roadmap of change initiatives** created and communicated to employees
- **Enhanced governance and OKRs** ensured that only strategic priorities were taken forward, funded and resourced
- **40% reduction in non-priority initiatives**

Using OKRs to develop new opportunities beyond traditional insurance models for a Provider of business insurance services

- Focused Goal-Setting: OKRs enabled a disciplined, discovery-driven approach by focusing on clear, measurable objectives
- Harnessed design thinking to build new businesses: Could efficiently build new businesses by setting specific objectives and measuring progress
- Collaboration and Learning: The adoption of OKRs supported a collaborative mentality and a "test and learn" approach.

Key Results:

3 New Business Launched since 2021:

- Business that provides insurance options for 'drivers with no cars'
- Business that provides insurance to small businesses
- Business that has API-first embedded insurance platform.

HEAR FROM OUR CLIENTS ON WHY THEY CHOSE JCURV

CDO – Nicky Klein explains why they selected JCURV as a transformation partner

[CLICK HERE]

CCEP leaders and colleagues explain why they selected JCRUV as their transformation partner and what makes JCURV different.

[CLICK HERE]

HEAR ABOUT OUR CLIENTS' TRANSFORMATION JOURNEYS WITH JCURV

Schroders personalwealth

SPW colleagues, discuss how an Agile approach can bring business and technology teams closer together to help solve the key challenges faced by the industry.

CLICK HERE

Coca-Cola EUROPACIFIC PARTNERS

CCEP leaders and colleagues explain why they selected JCRUV as their transformation partner and what makes JCURV different.

CLICK HERE

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