

Are You a Strategist?

Turning Strategic Choices into Real Capabilities, One Project at a Time

Where We Left Off

A distribution company bought more trucks to improve late deliveries. Its performance indicators improved, but customers were still unhappy. They continued to receive unclear information and could not depend on delivery promises.

The strategist identified the gap: the company needed better delivery information and coordination. The leadership team translated that direction into a strategic plan. It established measurable objectives, selected an initiative to strengthen delivery planning and information management, and approved the **Integrated Delivery Dashboard** project.

Now someone must organize and deliver that project. That person is the **project owner**. The strategist asks, “What must change, and why?” The project owner asks, “How will we deliver the agreed change?”. Both responsibilities matter. A well-chosen project needs disciplined execution. A well-managed project needs a clear strategic purpose.

1. Understand Why the Project Exists

Before planning the work, ask: “**Why does the company need this project?**” The distribution company’s mission is “Reliable Service.” Customers should receive their deliveries as promised and get clear information when plans change. The company sets a long-term objective: increase customer retention from 80% to 90% within two years while maintaining on-time delivery at 95% or higher. These corporate measures are called **CSFs**. To support this objective, Operations sets a short-term **KPI**: increase on-time dispatch from 85% to 95% within six months. This means more trucks must leave on schedule so deliveries have a better chance of arriving on time.

Element	Example in the Distribution Company
Mission	Reliable Service.
Strategic objectives	Increase customer retention from 80% to 90% within two years, while maintaining on-time delivery at 95% or higher.
Corporate CSFs	Customer retention rate: 90% within two years. On-time delivery rate: at least 95%, sustained through the two-year period.
Department KPI	Operations increases on-time dispatch from 85% to 95% within six months.
Strategic initiative	Strengthen delivery planning and information management.
Strategic project	Build and introduce the Integrated Delivery Dashboard across five branches.
Project KPIs	Launch in all five branches within four months, spend no more than Rp200 million, achieve 98% delivery-data accuracy, and have 90% of designated employees use the dashboard daily by project completion.
Expected benefit	Teams identify delays earlier, coordinate responses, and give customers clearer information and more dependable delivery promises.

However, teams cannot coordinate well if delivery information is late, incomplete, or kept in separate files. The company therefore chooses a strategic initiative: **strengthen delivery planning and information management**. To execute this initiative, it selects the **Integrated Delivery Dashboard** project. The dashboard will bring delivery information into one place so teams can identify delays earlier, coordinate responses, and give customers clearer updates. The project owner must understand this connection. The purpose is to build a dashboard that helps employees provide more reliable service. Better service can encourage customers to stay with the company, although other factors also affect retention. Before starting, the project owner should be able to answer: “How will this project help employees work better, and how will that improvement support the company’s objectives?”

2. Establish Three Clear Responsibilities

The dashboard project needs three clear roles. The **sponsor** gives the project support and resources. For example, the Director of Operations approves the budget and helps resolve major problems that the project team cannot handle alone. The **project owner** makes sure the dashboard is completed as agreed. They organize the team and manage the work, schedule, budget, and quality. The **benefit owner** makes sure the dashboard improves daily operations. For example, the Head of Distribution ensures that employees use it, keep delivery information updated, and act when delays appear.

The benefit owner must be involved from the beginning. They explain what employees need and help prepare the new working procedures. When the dashboard is ready, the project owner hands it over, together with training, instructions, and support arrangements. Completing the dashboard shows that the project has delivered its output. Employees using it to coordinate deliveries and provide dependable information shows that it is creating benefits. One person may hold more than one role, but everyone must know who is responsible for **supporting the project, delivering it, and achieving its benefits**.

3. Define What You Promise to Deliver

Before work begins, everyone must agree on **what the project will deliver**. The name “Integrated Delivery Dashboard” is not enough. One manager may expect only a screen showing delivery status. Another may also expect automatic alerts, new procedures, and employee training. The project owner must clarify these expectations and record the agreement in a short document called a **project charter**. It explains why the project is needed, what is included and excluded, who is responsible, when it must finish, how much it may cost, and how success will be checked.

Term	Simple Question	Dashboard Example
Deliverable	What will the project produce?	A working dashboard, instructions, and employee training.
Outcome	What will people do differently?	Operations and Customer Service use the same updated information to coordinate deliveries.
Benefit	What becomes better?	Customers receive clearer updates and more dependable delivery promises.

The team must also distinguish between what it produces, how people use it, and what improves as a result. A completed dashboard is a deliverable. When employees use it to coordinate their work, an outcome occurs. When that coordination improves the service customers receive, a benefit is created. The project owner must therefore clarify both what will be delivered and how it is expected to help.

Define the Scope

Scope explains the boundaries of a project. It tells everyone what the project team will do and what it will not do. Clear scope helps people understand what they can expect from the project. For the Integrated Delivery Dashboard, the team will connect delivery information from five branches, train employees to use the dashboard, and prepare procedures for updating information. These are included in the project. Replacing the finance system, buying more trucks, and redesigning delivery routes are outside its scope. These boundaries help the project owner estimate the work, time, people, and money required. If a manager later asks the team to add a finance feature, the project owner must explain that this is additional work. The request needs to be assessed because it may require more time, money, or resources.

Agree on Acceptance Criteria

After defining the scope, the team must agree on how the completed work will be checked. These requirements are called acceptance criteria. They explain what a deliverable must demonstrate before the authorized person approves it. For example, saying “the dashboard works” does not explain what successful delivery looks like. A clearer agreement states that the dashboard must display delivery information from all five branches, achieve at least 98% data accuracy, and show new updates within 15 minutes. Trained employees must also be able to find a delivery and update its status without help. These figures are hypothetical examples. Each requirement needs evidence. The team can check whether all five branches are connected, compare dashboard records with verified source records, measure how quickly updates appear, and observe employees using the system. The project owner must also clarify who checks the work and who approves it. IT may test the system and data, while the Head of Distribution confirms that it meets operational needs and gives final acceptance. Agreeing on these requirements before work begins gives everyone a shared understanding of when the deliverable is ready to be accepted.

4. Turn the Agreement into a Work Plan

Once everyone agrees on what the project will deliver, the project owner must explain how the work will be completed. A work plan identifies the tasks, their order, the people responsible, and the time and resources needed.

Start by dividing the project into smaller tasks. “Build the dashboard” is too broad to assign to one person or check for progress. Smaller tasks are easier to manage. For example, the team can confirm requirements, prepare delivery data, set up the dashboard, write procedures, train employees, and test the system. This breakdown is called a **Work Breakdown Structure, or WBS**.

Each task needs a clear output and a responsible person. For example, “prepare delivery data” should produce checked data that is ready to connect to the dashboard. The

project owner must also estimate how long the task will take and what support the person needs. **Next, decide the order of the tasks.** Some tasks must wait for others. The team needs to understand the requirements before preparing the data. Other tasks can happen at the same time, provided the necessary people and resources are available. Consider a simplified plan with four tasks. Task A confirms requirements and takes three weeks. After A finishes, Task B prepares and integrates the data over six weeks, while Task C prepares procedures and training materials over five weeks. Task D is final acceptance testing. It takes two weeks and can start only when both B and C are finished.

Task	Work	Duration	Must Wait For
A	Confirm requirements	3 weeks	Nothing
B	Prepare and integrate data	6 weeks	A
C	Prepare procedures and training materials	5 weeks	A
D	Conduct final acceptance testing	2 weeks	B and C

There are two routes through this plan. **A–B–D takes 11 weeks:** three weeks for requirements, six for data preparation, and two for testing. **A–C–D takes 10 weeks:** three weeks for requirements, five for procedures and training materials, and two for testing. The project cannot finish in 10 weeks because testing must wait for the longer data-preparation task. Its earliest completion is therefore **11 weeks**. The route that determines this finish date—A–B–D—is called the **critical path**. If Task B takes one extra week, testing starts one week later and the project finishes in 12 weeks, unless the team changes the plan. Task C can take one extra week without delaying the project because it would still finish at the same time as B. The project owner must watch critical-path tasks closely because their delays directly affect the completion date.

Finally, check whether the plan is realistic. Two tasks may appear able to happen together, but this will not work if both require the same employee full-time. The project owner must check people’s availability, including their daily responsibilities, before confirming the schedule. The plan must also estimate the cost of equipment, services, materials, and people’s time. Explain how each estimate was calculated and compare the total with the approved budget. For the dashboard project, the team must check whether its plan can meet the agreed four-month deadline and Rp200 million budget. If the work requires more time or money than approved, the project owner should present options to the sponsor. These might include reducing the scope, adding resources, or extending the deadline. The sponsor can then make an informed decision before the team accepts a revised commitment.

5. Prepare for Risks and People

A project plan explains what the team expects to happen. However, things may not go as planned. A **risk** is something that has not happened yet but could affect the project. For the dashboard, data may be difficult to combine, an important employee may become unavailable, or staff may continue using their old files. The project owner should identify important risks before work begins. For each risk, ask two questions: **“How likely is it to**

happen?” and “How serious would its effect be?” Then decide how to respond and assign someone to take responsibility.

Risk	Possible Effect	Possible Response
Branch data may be inconsistent.	Data integration and testing take longer.	Check sample data early and agree on common data standards.
A key employee may become unavailable.	A critical task is delayed.	Arrange backup support and document the work.
Staff may continue using separate files.	The dashboard is completed but not used consistently.	Involve users early, test the workflow, and have the benefit owner prepare operational support.

Preparing a response does not guarantee that a risk will disappear. It helps the team reduce the chance of a problem or limit its effects. For example, checking data early gives branches time to correct their records before integration begins. The third example shows why managing risks also means understanding people. Employees may hesitate to use the dashboard because they find it difficult, lack time to update it, or worry that it will be used to blame them for delays. Training may help, but the project owner must first understand the concern.

People who can affect the project or are affected by it are called **stakeholders**. For the dashboard, these include Operations, Customer Service, IT, branch employees, customers, the sponsor, and the benefit owner. The sponsor and benefit owner are stakeholders with specific responsibilities: the sponsor provides support and major decisions, while the benefit owner ensures that using the dashboard improves daily operations. Different stakeholders need different things. Customer Service needs accurate information to answer customers. Branch employees need a practical updating process. IT needs clear technical requirements. The benefit owner needs to prepare the procedures, responsibilities, and support that will continue after the project ends.

The project owner must plan communication around these needs. The sponsor needs timely information about major risks and decisions requiring approval. Team members need clear tasks and priorities. Employees need to understand why the dashboard is being introduced, how to use it, and where to get help. Customers may need to be consulted about which delivery updates are most useful to them. Communication should also allow people to ask questions and raise concerns. Regular feedback can reveal problems before they cause delays or resistance. Good communication gives the right people the information they need—and a way to respond—so they can help the project succeed.

6. Monitor Delivery and Manage Changes

Once work begins, the project owner must check whether the project is progressing as agreed. They coordinate the team, resolve problems within their authority, and ask the sponsor for decisions that require additional approval. Regularly compare the approved plan with what is actually happening. For the dashboard project, the team should check whether work is progressing toward the four-month deadline, spending remains within the

Rp200 million budget, and deliverables meet the agreed requirements. The following questions guide this review.

Control Area	What to Check
Schedule	Are tasks and milestones completed by their planned dates?
Cost	Is spending within the approved budget, and is the remaining budget enough to finish the work?
Quality	Do the dashboard, data, and procedures meet the agreed acceptance criteria?
Project KPIs	Are the agreed project targets being achieved?
Risks and adoption	Have new risks appeared? Are employees preparing to use or already using the dashboard?

These areas provide different views of progress. Tasks may be completed on time, but the data may still be inaccurate. Spending may be within budget, but essential work may remain unfinished. The project owner must consider the findings together before concluding that the project is on track.

If progress falls behind, investigate the cause before choosing a response. Suppose data integration is one week late. If branch employees do not understand the data requirements, the team needs clearer instructions. If employees understand the requirements but lack time, managers may need to provide additional support. The same delay can require different solutions. After deciding on corrective action, assign someone to carry it out and set a date to check the result. Monitoring should lead to action and follow-up, rather than simply reporting that the project is late.

New requests also need careful decisions. Imagine that halfway through the project, the sponsor asks for a feature showing delivery costs. The feature could be useful, but it was not included in the original scope. The project owner should record the request and explain its consequences. Will it require additional data, more staff time, extra testing, a larger budget, or a later completion date? Could it introduce new risks or reduce the time available to check quality? Is the expected benefit worth the additional effort?. The authorized decision-maker can then approve, reject, postpone, or revise the request. This process is called **change control**. Once a change is approved, the project owner updates the plan and informs everyone affected. The team should not accept additional work without checking whether the original deadline, budget, and quality requirements can still be met.

The project owner must also connect delivery progress with the project's strategic purpose. **Project control** asks, "Are we delivering the dashboard as agreed?" **Strategic review** asks, "Does this project still provide a useful way to improve reliable service?"

The project owner supplies evidence about progress, spending, quality, risks, and early use. The leadership team uses that evidence to decide whether to continue, adjust,

expand, or stop the project. Different results must be reviewed at different times. The dashboard may be due within four months, the department KPI within six months, and the corporate CSF within two years. Completing the dashboard does not mean that every business target should already have been achieved. The company must continue checking whether employees use it effectively and whether that use contributes to better coordination, more reliable delivery, and customer retention.

7. Close and Hand Over

A project has a beginning and an end, but the work it supports often continues. Building and introducing the dashboard is a project. Afterward, employees must keep updating delivery information, IT must maintain the system, and managers must respond to delivery problems. These are daily operations.

Before closing the project, the project owner must check that the agreed deliverables are complete and meet the acceptance criteria. For example, the dashboard must display information from all five branches, meet the agreed data-quality requirements, and allow trained employees to perform essential tasks. The authorized person then reviews the evidence and formally accepts the deliverables. Next, the project owner must make sure that someone is ready to take over each continuing responsibility. IT may maintain the system and provide technical support. Branch employees may update delivery records. Operations managers may use the information to coordinate responses to delays. Everyone should understand what they must do and where to get help.

This transfer of responsibility is called **handover**. It includes giving the relevant people the instructions, records, training materials, and access they need. Any unresolved issues must also be explained, with a named person responsible for each follow-up action. Handover should begin before the final week so that people have time to prepare and ask questions.

The project owner and benefit owner must also agree on what happens after launch. They should confirm which improvements will be monitored, what evidence will be collected, and when the benefits will be reviewed. For example, the Head of Distribution may review whether employees consistently use the dashboard and whether delivery coordination improves. Finally, the team should record lessons from the project. What worked well? What caused delays or confusion? What should the next team do differently? These lessons help the company improve future projects. The project can close once the agreed deliverables have been accepted and the handover arrangements are confirmed. The project owner's delivery work ends, while operational owners and the benefit owner continue using the dashboard and following up its results.

8. Follow the Benefit Beyond Launch

Launching the dashboard is an important achievement, but the company must still check whether it improves daily work. Imagine that the dashboard is completed on time, stays within budget, and passes acceptance testing. However, several branches continue using separate files. The system has been delivered, but its expected benefits have not been fully achieved.

The **benefit owner** must find out why employees are not using it consistently. Perhaps they do not understand the procedures, find the dashboard difficult to use, or feel that

updating information adds to their workload. The response should address the cause. Employees may need clearer instructions, more practice, or a simpler updating process.

The benefit owner works with the relevant teams to make these improvements. IT may provide technical support, while branch managers ensure that employees update delivery records. Before handover, the **project owner** must make sure that instructions, training, and support arrangements are clear.

Benefit follow-up begins by checking whether employees use the dashboard and follow the procedures. The benefit owner then checks whether delivery information is more accurate and current, and whether teams identify delays and coordinate responses earlier.

Next, the company reviews the department KPIs. For example, has on-time dispatch improved toward its six-month target? Over the longer term, it reviews the corporate CSFs, including sustained on-time delivery and customer retention. These results must be assessed over their agreed timeframes.

The expected connection is straightforward. Timely updates provide better information. Shared information helps teams coordinate their work. Better coordination helps the company keep delivery promises. Reliable service can encourage customers to stay.

The company must check this connection with evidence. If employees use the dashboard but delivery performance does not improve, the benefit owner must investigate further. Other problems, such as poor scheduling or unavailable vehicles, may still prevent the company from achieving its targets.

Are You Ready to Be the Project Owner?

Before accepting responsibility, make sure you can explain why the project matters. Understand the intended result, the department KPI it supports, and how it contributes to the company's mission.

Then check what you have agreed to deliver. Scope, deliverables, expected outcomes, and acceptance criteria should be clear. Tasks should follow a workable sequence, with realistic estimates of time, resources, and cost.

You must also be ready to work with people. The sponsor and benefit owner should be involved, team members should understand their responsibilities, and important risks should have someone assigned to respond. Everyone should know how requests for changes will be assessed and approved.

Finally, prepare for handover before the project ends. Confirm who will accept the deliverables, which teams will maintain and use them, and when the benefit owner will review the results. Your responsibility is to deliver what was agreed, provide evidence of completion, and prepare a clear handover so the benefit owner can turn the completed capability into lasting improvement.

Make it a good day!
Never stop learning.