MSS
MAKING STRONG SUCCESS

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

From Mandate to Measurable Strategy: How a Philippine Government-Owned Financial Technology Institution Built a Five-Year Strategic Management Framework

An Anonymized Strategic Planning Consultancy, Facilitation, and Balanced Scorecard Case Study in the Philippines

Confidentiality Notice: This case study intentionally withholds the client organization's name, acronym, logo, executives' and employees' identities, exact engagement dates, financial figures, budgets, revenues, operational volumes, customer statistics, staffing figures, proprietary targets, detailed system specifications, internal vulnerabilities, and other information that could reasonably identify the institution or expose confidential organizational information. The discussion focuses only on the strategic-planning methodology, appropriate high-level themes, documented deliverables, and lessons that may be valuable to other organizations.

Case Study Overview

How do you develop a long-term strategy for an organization whose success cannot be measured by profit alone?

That was one of the central challenges faced by a **Philippine government-owned financial-technology institution responsible for maintaining a centralized credit-information infrastructure and supporting the country's broader credit ecosystem**.

The organization was operating at the intersection of government policy, financial services, data management, technology, cybersecurity, consumer protection, regulatory compliance, public accountability, and national economic development.

It already had an existing mandate, strategic direction, performance scorecard, information-systems plans, organizational-development initiatives, and government performance requirements.

What it needed was not another planning document.

It needed an integrated **five-year strategic management framework** capable of connecting:

- its legal mandate;
- its desired future state;
- stakeholder expectations;
- organizational capabilities;
- external developments;
- strategic priorities;
- measurable objectives;
- performance indicators;
- multi-year targets;
- departmental initiatives; and

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

- execution accountability.

Mentor Myron Sta. Ana, serving as the **Chief Strategic Planning Consultant and Facilitator**, guided the organization through the consultancy and facilitated planning process. The engagement was structured around the development of a Strategy Map, Balanced Scorecard, strategic measures, targets, organizational initiatives, departmental action plans, and alignment mechanisms.

The resulting strategic-plan document shows that the organization ultimately connected its long-term and short-term strategies with financial and non-financial goals, measurable objectives, departmental initiatives, and multi-year action plans.

The Client Context

The client was a government-owned institution operating within the Philippine financial and credit-information ecosystem.

Its mandate required it to maintain and make available standardized credit information through a centralized information infrastructure while supporting better decision-making, risk management, consumer protection, and broader access to credit.

Because of the nature of its mandate, its strategy had to balance several dimensions simultaneously:

- public-service responsibility;
- regulatory compliance;
- financial sustainability;
- stakeholder and customer value;
- data quality;
- technology modernization;
- cybersecurity and privacy;
- organizational capacity;
- employee capability;
- process efficiency;
- governance;
- public awareness; and
- social impact.

The organization could not simply ask:
“How do we grow?”

It also had to ask:
“How do we fulfill our mandate more effectively, sustainably, securely, and measurably while responding to a rapidly changing financial, technological, regulatory, and social environment?”

The Strategic Planning Challenge

The engagement involved more complexity than starting from a blank sheet of paper.

The institution already had:

- an existing Strategy Map;
- organizational performance measures;
- previous targets and accomplishments;
- information-systems plans;
- restructuring proposals;
- government performance-management requirements;
- customer-research inputs;
- established policies;
- a governing board representing multiple stakeholder perspectives; and
- several operating groups with different responsibilities.

The challenge was to integrate these into one coherent strategy.

Challenge 1: Strategy had to remain anchored in the mandate

For a government-owned institution, strategy cannot be formulated independently of its enabling law and public purpose.

The governing performance framework itself emphasizes that an institution's Vision, Mission, and Core Values must remain consistent with its mandate and stakeholder responsibilities.

This meant every strategic choice had to be tested against questions such as:

- Is this consistent with why the institution exists?
- Does it support its public mandate?
- Is this something the organization is authorized to pursue?
- Does it create value for its stakeholders?
- Can it be measured?
- Can the organization realistically execute it?

Challenge 2: The strategic plan had to satisfy both strategy and government performance requirements

The institution operated within a government performance-management environment that required more than broad aspirations.

The applicable Performance Evaluation System framework requires four interconnected elements:

1. Charter Statement;
2. Strategy Map;
3. Performance Scorecard; and
4. Strategic Initiatives.

The planning process therefore needed to go beyond identifying priorities.

It had to connect:
Vision → Strategic Objectives → Measures → Targets → Strategic Initiatives → Execution

The government performance framework defines the Performance Scorecard as the mechanism that translates strategic objectives into metrics and indicators that measure progress and guide decision-making toward the organization's Vision.

Challenge 3: The organization needed genuine leadership and board alignment

The strategic direction could not be developed by the planning office alone.

The organization had a governing board with members bringing different professional, regulatory, financial, technical, and stakeholder perspectives.

The consultancy therefore incorporated dedicated consultative discussions with members of the governing body. The documented board consultations show active debate concerning:

- the desired organizational identity;
- how concise or expansive the Vision should be;
- consumer protection;
- sustainability;
- customer relationships;
- data quality;
- technology;
- organizational maturity;
- regulatory developments;
- institutional structure; and
- the distinction between symptoms and root causes.

Another board consultation specifically examined the Vision, Mission, customer-service requirements, organizational weaknesses, technology, data quality, and the need to identify root causes rather than simply describing poor outcomes.

This made the planning process participative rather than consultant-dictated.

Challenge 4: The plan needed to address causes, not merely symptoms

Many organizations build strategies around statements such as:

- “Improve employee performance.”
- “Fix customer service.”
- “Improve data quality.”
- “Increase efficiency.”
- “Hire more people.”

But these statements do not necessarily identify the real problem.

The consultancy therefore incorporated **root-cause analysis using the Five Whys method**.

The analysis traced selected organizational weaknesses through successive causal factors. The worksheets demonstrated how visible issues could be connected to deeper structural, workload, capability, process, staffing, and organizational-design causes.

The wider root-cause analysis also examined issues involving organizational structure, career opportunities, role clarity, procurement, workload distribution, process documentation, and capability constraints.

This distinction was critical.

A strategic initiative aimed at the symptom may generate activity. A strategy aimed at the root cause has a better chance of generating change.

Objectives of the Strategic Planning Consultancy

The engagement was designed to help the organization:

1. Revisit its mandate and organizational identity.
2. Reassess its Vision, Mission, and Core Values.
3. Review the past and understand how previous actions shaped the present.
4. Conduct an internal organizational audit.
5. Identify strategic strengths and weaknesses.
6. Determine the root causes of selected weaknesses.
7. Scan the external environment for opportunities and threats.
8. Formulate long-term strategic goals.
9. Translate strategic goals into measurable strategic objectives.
10. Organize priorities through a Balanced Scorecard framework.
11. Develop strategic measures and performance targets.
12. Identify organizational initiatives that could move the measures.

13. Connect organizational strategy with departmental ownership.
14. Align initiatives with resources and budget considerations.
15. Develop departmental action plans.
16. Establish a framework for monitoring, evaluation, and future review.

The Strategic Planning Consultancy and Facilitation Process

Phase 1: Understanding the Existing Organization Before Designing the Future

The planning process did not begin with brainstorming.

It began with understanding what already existed.

The organization reviewed its mandate, existing strategic direction, performance requirements, organizational-development documents, customer-related information, technology plans, and other relevant planning inputs.

This was particularly important because the organization already operated under an established government performance framework.

The planning approach therefore needed to complement—not duplicate or contradict—existing institutional systems.

Phase 2: Revisiting the Vision, Mission, and Values

A major early component of the engagement involved revisiting the organization's identity.

The planning documentation records that the board and top management reconsidered the institution's Vision, Mission, and Core Values in order to clarify:

- what the institution wanted to become;
- where it intended to go;
- what it needed to do consistently; and
- how people within the institution should conduct themselves.

The process examined whether the organization's previous statements were still responsive to:

- its mandate;
- stakeholder needs;
- changes in the financial environment;
- technological developments;
- sustainability requirements;
- consumer expectations; and
- the organization's evolving maturity.

The board consultations demonstrate that these statements were challenged and refined rather than simply accepted from a consultant-created draft.

Phase 3: Looking Back Before Looking Forward

The strategic planners were guided to examine how the past created the present.
Instead of merely asking whether the organization had achieved its previous targets, the process explored questions such as:

- What was done?
- What worked?
- What did not work?
- What was not done?
- What could have worked but was not pursued?
- Which actions continued even though they were unlikely to succeed?
- What lessons should influence the next planning horizon?

The final strategic-plan documentation explicitly describes this **Past Analysis** and then connects it to the organization's current capacities, competencies, and change readiness.

This helped prevent the strategic plan from becoming disconnected from institutional experience.

Phase 4: Internal Organizational Audit

The planning team analyzed the institution's internal situation across important organizational dimensions.

The assessment covered themes involving:

- financial stewardship;
- stakeholders and customers;
- internal processes;
- organizational capacity;
- people and competency;
- technology;
- governance;
- organizational structure; and
- public or social impact.

The purpose was not to produce an exhaustive inventory of everything happening inside the organization.
It was to determine which internal conditions had **strategic significance**.

The resulting SWOT analysis documented both organizational advantages and weaknesses requiring attention.

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

Phase 5: Root-Cause Analysis Through the Five Whys

Selected weaknesses were subjected to deeper analysis.

The facilitator guided participants to distinguish:
Observed Problem → Causal Factors → Underlying Root Cause

For example, the internal analysis showed how problems involving service delays, workload, staffing, organizational roles, and employee turnover could sometimes be traced to structural and workforce-design concerns rather than individual employee behavior alone.

This stage helped participants avoid a common strategic-planning mistake:
Treating the effect as though it were the cause.

The Five Whys process helped the organization identify where strategic intervention would potentially have greater leverage.

Phase 6: External Environmental Scanning Through PESTLE

The organization's future could not be planned solely from internal information.

The team examined developments across the external environment using **PESTLE analysis**:
- Political
- Economic
- Social
- Technological
- Legal
- Environmental

The analysis covered high-level themes such as:
- changing legislation and regulation;
- development of digital financial services;
- evolving customer behavior;
- financial inclusion;
- emerging technologies;
- cybersecurity;
- privacy expectations;
- alternative information providers;
- government digitalization;
- broader economic conditions; and
- environmental and sustainability considerations.

The technology portion of the environmental scan considered developments such as cloud technology, artificial intelligence, digital transactions, online lending, digital banking, and wider internet and mobile adoption.

The purpose was not simply to produce a PESTLE list.

Participants needed to determine:

- Which developments created opportunities?
- Which posed threats?
- Which demanded preparation?
- Which required organizational capability
- Which could affect the institution's long-term relevance?

Phase 7: Turning SWOT and PESTLE Into Strategic Choices

SWOT was used as an input—not as the final strategy.

The consultancy guided the planners in converting internal and external findings into possible strategic responses. Broadly, strategies were developed to:

- enhance existing strengths;
- correct or transform weaknesses;
- align internal systems;
- leverage external opportunities;
- respond to threats;
- time initiatives appropriately; and
- eliminate activities that no longer supported the desired direction.

The final strategic plan explicitly states that the organization developed long- and short-term strategies intended to strengthen internal advantages, address weaknesses, leverage opportunities, and overcome threats.

Phase 8: Building the Strategy Map

Strategic goals were then organized using a Balanced Scorecard approach.

The facilitated agenda structured goals across five organizational perspectives:

- Financial
- Customer/Stakeholder
- Internal Processes
- Learning and Growth/Organizational Capacity
- Social Impact

This was important for a public-sector institution.

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

Its strategy could not be defined only by financial performance.

The institution also needed to consider:

- stakeholder value;
- operational excellence;
- people and organizational capability;
- long-term institutional sustainability; and
- wider public impact.

The governing performance framework describes the Strategy Map as the story of how interconnected strategic objectives lead toward the organization's Vision.

Phase 9: Translating Strategic Goals Into S.M.A.R.T.E.R. Objectives

A strategic goal describes **what destination matters**.

A strategic objective clarifies **how the organization intends to move toward it**.

The planning agenda required each strategic goal to be supported by objectives that were sufficiently specific and measurable and explicitly required the objectives to follow a **S.M.A.R.T.E.R.** formulation.

This helped move discussions from statements such as:

- improve customer experience;
- strengthen organizational capability;
- modernize technology;
- improve internal processes;

toward objectives that could ultimately be connected with:

- measures;
- performance levels;
- timelines;
- initiatives; and
- ownership.

Phase 10: Developing the Balanced Scorecard and Performance Measures

The Strategy Map established the strategic direction.

The Balanced Scorecard established how progress would be tracked.

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

Under the applicable performance-management framework, strategic measures are expected to quantify whether objectives and strategic goals are being achieved. Measures may take the form of percentages, ratios, ratings, indices, rankings, and other relevant indicators.

The consultancy therefore moved the planning conversation from:
“What do we want?”

to:

“How will we know whether we are actually getting there?”
The resulting strategic plan connected organizational goals with strategic objectives, measures, multi-year targets, and initiatives.

Phase 11: Setting Multi-Year Targets

Targets were not treated merely as arbitrary numbers.

Government performance guidance emphasizes that targets should show the organization’s progression toward its strategy, beginning with the desired end state and then establishing annual progress points.

Accordingly, the institution’s five-year framework included annual progression points across its planning horizon. For confidentiality reasons, the specific financial, operational, customer, workforce, technology, and other performance targets are intentionally excluded from this case study.

What can be shared is the structure:
Strategic Objective → Strategic Measure → End-of-Horizon Target → Annual Milestones

---

Phase 12: Formulating Strategic Initiatives

Measures and targets alone do not execute strategy.

The planning process therefore required operating groups to develop initiatives capable of moving the strategic measures.

The government Performance Evaluation System describes strategic initiatives as projects, programs, or action plans designed to close performance gaps and contribute to strategic objectives.

During the facilitated process, the respective groups were required to identify initiatives for implementing strategic objectives while remaining accountable as owners, enablers, or responsible units.

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

At a high level, the resulting strategic themes included initiatives involving:

- financial sustainability;
- stakeholder engagement;
- customer access and experience;
- organizational restructuring and capacity;
- workforce development;
- internal process alignment;
- data quality;
- technology modernization;
- cybersecurity and privacy;
- regulatory and legal readiness;
- institutional planning; and
- public awareness.

Specific project names, amounts, system details, and proprietary commitments have been intentionally withheld.

Phase 13: Linking Strategy With Organizational Structure

One particularly important feature of the engagement was that strategy was not developed in isolation from organizational design.

The institution was simultaneously examining its future organizational requirements and the need for its structure and staffing to remain aligned with strategy.

Government policy for GOCC reorganization specifically requires organizational structure and staffing to align with strategy, support effective decision-making, reflect relevant organizational-development and workforce-planning practices, and improve organizational performance.

This allowed the strategic-planning process to ask a deeper execution question:
Does the organization currently have the structure, roles, competencies, and capacity required to execute its future strategy?

This is an important distinction between strategic planning as documentation and strategic planning as organizational transformation.

Phase 14: Group Alignment

Departments could not finalize their initiatives independently.

The third stage of the formal planning agenda required the entire planning body to:

- critique;

- reconcile;
- agree on; and
- finalize

the Strategy Map, objectives, measures, targets, organizational initiatives, and related resource considerations.

This created an opportunity to identify:
- overlapping initiatives;
- competing priorities;
- cross-functional dependencies;
- inconsistent assumptions;
- ownership gaps;
- resource implications; and
- initiatives that supported several objectives simultaneously.

Alignment is especially important because the applicable performance framework warns against strategic objectives that are disconnected, excessive, outside organizational control, or merely “business as usual.”

Phase 15: Departmental Action Planning

After organization-wide alignment, responsibility moved closer to execution.

Each department or operating unit was expected to convert strategic initiatives into actionable commitments supported by performance indicators.

The facilitated agenda explicitly required departments to prepare action steps using an action-planning framework after the organization had aligned on the overall Strategy Map, measures, targets, and initiatives.

The finished strategic-plan documentation confirms that different organizational groups were assigned their own contributions toward achieving strategic goals and objectives, and that initiatives were expected to be measurable and observable so they could be monitored, evaluated, and adjusted during future reviews.

Phase 16: From Planning Event to Continuing Consultancy

The photo documentation shared for this project shows that the engagement extended beyond one isolated planning workshop.

The strategic planning proper was followed by additional online consultative and refinement sessions to continue reviewing and completing the multi-year strategy.

This was consistent with the complexity of the required outputs.

A credible five-year strategic management framework involving:

- leadership consultation;
- organizational analysis;
- root-cause analysis;
- Strategy Map development;
- performance measures;
- multi-year targets;
- organizational initiatives; and
- departmental action plans

cannot always be completed responsibly within a single workshop.

The consultancy therefore functioned not simply as event facilitation but as an **iterative strategic-planning advisory process**.

Major Strategic Themes Addressed

Without disclosing proprietary details, the completed strategy addressed several organization-wide themes.

1. Institutional Sustainability
The organization examined how it could sustain its mandate and operations over the planning horizon while remaining accountable for the effective use of resources.

2. Stakeholder and Customer Value
The plan addressed how the institution could improve its relevance, accessibility, stakeholder engagement, customer relationships, and service experience.

3. Internal Process Alignment
One strategic theme focused on improving inter-unit processes, policies, service standards, and process flows. The final plan includes an explicit objective involving stronger alignment among operational units and the development or refinement of inter-unit policies, agreements, and process flows.

4. Data Quality
Because reliable information is central to the institution's mandate, data quality became an organization-wide strategic concern rather than solely a technology issue.

5. Organizational Capacity
The strategy recognized that successful execution required the right organizational structure, workforce, skills, leadership, systems, and resources.

MSS SUCCESS SPACES
Units 2K-2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

6. Human Capital
The strategic plan included objectives addressing recruitment, competency, retention, employee engagement, and organizational capability.

7. Technology and Digital Transformation
The strategy considered modernization, information systems, analytics, infrastructure, service delivery, and emerging technologies as strategic enablers.

8. Cybersecurity and Data Privacy
Information security and privacy maturity were connected with regulatory requirements and recognized industry standards.

9. Governance, Compliance, and Legal Readiness
The strategic framework also recognized the need to remain responsive to changing regulatory, statutory, and legal developments.

10. Social and Developmental Impact
Because the institution exists within a public-service environment, the strategy also considered its broader contribution to financial awareness, inclusive access, and the development of the Philippine credit ecosystem.

Documented Outputs of the Consultancy

The engagement produced the foundation of a complete strategic-management system rather than a stand-alone workshop report.

1. Reviewed organizational identity
The institution revisited its mandate, Vision, Mission, and Core Values.

2. Past and current-state analysis
The planners examined previous actions, present organizational capabilities, competencies, and change readiness.

3. SWOT analysis
Strategic internal strengths and weaknesses and external opportunities and threats were consolidated.

4. Root-cause analysis
Selected weaknesses were examined using the Five Whys method.

5. PESTLE environmental scan
Political, economic, social, technological, legal, and environmental developments were considered.

6. Five-year Strategy Map
Organization-wide strategic goals and objectives were organized into an integrated strategy.

7. Balanced Scorecard
Strategic objectives were translated into measures and performance targets.

8. Multi-year performance targets
The strategic plan established annual progress points across the five-year planning horizon.

9. Strategic initiatives
Operating groups developed initiatives supporting the objectives and performance measures.

10. Departmental action plans
Strategic initiatives were translated into departmental ownership and implementation commitments.

11. Alignment framework
The process required organization-wide critique and agreement before completion.

12. Strategic-plan document
The strategy, measures, targets, and departmental initiatives were consolidated into a formal multi-year strategic-plan document.

The final document explicitly identifies the work as having been **facilitated, critiqued, and consolidated by the Chief Consultant/Facilitator** and subjected to executive review and evaluation.

The Documented Transformation

The supporting files document the planning process and completed strategic-management framework.

They do **not**, however, contain a complete independent post-implementation impact evaluation covering all subsequent years of the plan.

For that reason, this case study does not claim unverified improvements in revenue, profitability, service usage, data quality, customer satisfaction, employee performance, technology availability, or other operational indicators.

The documented transformation is better described as the movement from:

Before the Consultancy	After the Strategic Planning Process
Existing plans and performance requirements	One integrated five-year strategic framework
Previous Vision and Mission	Revisited organizational direction
Performance issues	Organization-wide strategic analysis

Symptoms and observed weaknesses	Root-cause examination
SWOT observations	Inputs for strategic choices
Environmental developments	PESTLE-informed strategic responses
General priorities	Defined strategic goals
Broad aspirations	S.M.A.R.T.E.R. strategic objectives
Strategy Map concepts	Structured organization-wide Strategy Map
Objectives	Strategic measures
Measures	Multi-year targets
Proposed projects	Strategy-linked initiatives
Central organizational plan	Departmental ownership
Departmental proposals	Organization-wide alignment
Planning workshop	Continuing consultancy and refinement process
Strategy formulation	Foundation for execution and performance monitoring

---

What Makes This Strategic Planning Case Study Different?

Many strategic-planning workshops stop after producing:

- SWOT;
- Vision and Mission;
- several strategic themes; and
- a list of projects.

This engagement went further.

It integrated:
Mandate → Organizational Identity → Past Analysis → Organizational Audit → Root-Cause Analysis → PESTLE → Strategic Goals → Strategic Objectives → Strategy Map → Measures → Targets → Initiatives → Departmental Action Plans → Alignment

That is the difference between **strategic planning as a workshop** and **strategic planning as a management system.**

Key Lessons for Organizations Planning Their Next Strategy

1. Do not begin with SWOT
Begin with the mandate, purpose, desired future, and evidence about the present.

SWOT becomes more useful when participants understand what the organization is trying to accomplish.

2. Involve governance and executive leadership early
When strategic choices affect organizational identity, investment priorities, structure, performance measures, and institutional direction, senior decision-makers cannot merely approve the plan at the end.

They should help shape it.

3. Distinguish symptoms from root causes
“Low performance” is rarely a root cause.

Ask what system, policy, process, structure, capability, resource, leadership behavior, or environmental condition is creating the outcome.

4. Environmental scanning must influence strategy
PESTLE should not become a collection of news headlines.

The question is:
What does this development mean for our organization, and what should we do because of it?

5. Strategy needs both financial and non-financial perspectives
A balanced strategy considers:

- financial and resource sustainability;
- customers and stakeholders;
- internal processes;
- organizational capability; and
- where appropriate, broader social impact.

6. A Strategy Map should tell a story
Strategic objectives should reinforce one another.
Government performance guidance specifically emphasizes logical interconnection among objectives across strategic perspectives.

7. A KPI without a strategic objective can become meaningless activity
Measures should exist because they tell management whether the strategy is working.

8. A target without an initiative is only an aspiration
The organization must identify what programs, projects, and actions will actually move the measure.

9. An initiative that moves no strategic measure should be challenged
Government performance guidance specifically recommends testing whether strategic initiatives actually affect strategic measures; an initiative that contributes little to the measures may not be strategically important.

10. Strategic planning should eventually cascade
Organization-wide strategy becomes executable when departments know:

- what they own;
- what they enable;
- what they must deliver;
- how success is measured; and
- how their work connects with other units.

Why Engage a Strategic Planning Consultant in the Philippines?

A qualified **Strategic Planning Consultant in the Philippines** should provide more than templates.

The consultant helps leadership answer difficult questions such as:

- What are the real strategic issues?
- Which problems are symptoms?
- What should the organization stop doing?
- Which capabilities must be built?
- Which external changes matter?
- Are the objectives genuinely strategic?
- Can the measures actually prove success?
- Are targets realistic but challenging?
- Will the proposed initiatives move the measures?
- Does the organizational structure support execution?
- Are departments aligned?
- What should leadership monitor after the workshop?

The consultant also provides independent challenge.

Internal planners may know the organization extremely well, but familiarity can sometimes make assumptions difficult to question.

An external consultant can help leadership examine those assumptions objectively.

Why Engage a Strategic Planning Facilitator in the Philippines?

A **Strategic Planning Facilitator in the Philippines** manages the process through which people create the strategy.

The facilitator helps:

- ensure broad participation;

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

- challenge unclear assumptions;
- keep discussions strategic;
- prevent one person from dominating;
- reconcile different stakeholder viewpoints;
- distinguish strategic from operational issues;
- guide consensus;
- maintain logical alignment;
- convert discussions into outputs; and
- move the organization from ideas toward decisions.

The facilitator does **not** decide the organization's strategy.

The leaders own the strategy.

The facilitator makes the planning process more disciplined, inclusive, evidence-based, and productive.

What Does a Strategic Planning Coach Do?

A **Strategic Planning Coach in the Philippines** can complement consultancy and facilitation by helping executives and planning leaders strengthen how they think about and execute strategy.

Coaching may help leaders:

- challenge their own assumptions;
- sharpen strategic thinking;
- improve prioritization;
- translate strategy into leadership behavior;
- hold teams accountable;
- conduct strategic reviews;
- respond to changing conditions; and
- maintain momentum after the planning workshop.

For some organizations, the most effective intervention is therefore not a single service but a combination of:
Strategic Planning Consultancy + Facilitation + Executive Coaching + Follow-Through Reviews

---

When Does an Organization Need This Type of Engagement?

A comprehensive strategic-planning consultancy may be appropriate when:

- the current strategic plan is expiring;
- a new leadership team has taken over;
- the organization's environment has materially changed;
- growth has outpaced its structure;

- departments are working in silos;
- KPIs exist but do not clearly connect with strategy;
- initiatives are plentiful but priorities are unclear;
- the organization needs a Balanced Scorecard;
- leaders want measurable five-year targets;
- the company needs to align strategy with organizational restructuring;
- an agency needs to comply with government planning or performance requirements;
- technology is transforming the business model;
- customer expectations are changing; or
- the existing plan is not translating into execution.

Frequently Asked Questions

What does a Strategic Planning Consultant in the Philippines do?
A strategic planning consultant helps an organization assess its present condition, understand its environment, clarify strategic choices, formulate measurable goals and objectives, develop performance measures and targets, align initiatives, and establish an execution framework.

What is the difference between a Strategic Planning Consultant and a Strategic Planning Facilitator?
The consultant provides expertise, analysis, recommendations, frameworks, and strategic challenge.
The facilitator manages the planning conversation, participation, consensus-building, decision-making, and development of group outputs.

One professional may perform both roles when appropriately qualified.

What is a Strategy Map?
A Strategy Map visually or logically connects the organization's strategic objectives and explains how capabilities and internal processes contribute to stakeholder outcomes and the organization's desired future.

What is a Balanced Scorecard?
A Balanced Scorecard translates strategy into measurable objectives, indicators, targets, and strategic initiatives across several organizational perspectives.

Is a SWOT analysis enough for strategic planning?
No.

SWOT is an analytical input.

A complete strategic-management process should translate the analysis into strategic choices, objectives, measures, targets, initiatives, accountability, and execution.

Why conduct root-cause analysis during strategic planning?
Because strategic initiatives should address the factors creating organizational problems—not merely their visible symptoms.

Why use PESTLE analysis?
PESTLE helps organizations systematically examine political, economic, social, technological, legal, and environmental developments that may create strategic opportunities or threats.

Should government institutions use a Balanced Scorecard?
A Balanced Scorecard can be particularly useful when adapted to a public-sector organization because it allows leadership to consider financial stewardship alongside stakeholders, processes, organizational capacity, and public impact.

How long does strategic planning take?
The planning workshop itself may take several days, but a comprehensive consultancy can involve pre-work, interviews, surveys, board consultations, analysis, planning proper, documentation, validation, refinement, cascading, and follow-through sessions over a longer period.

What should happen after the strategic plan is completed?
The organization should:

- cascade the strategy;
- assign owners;
- execute initiatives;
- monitor KPIs;
- review progress regularly;
- diagnose deviations;
- make corrective decisions; and
- update assumptions when the environment changes.

Looking for a Strategic Planning Consultant, Facilitator, or Coach in the Philippines?

Your Strategy Guy helps private companies, government institutions, associations, and other organizations move from planning conversations to structured strategic-management systems.

Services may include:

- Strategic Planning Consultancy
- Strategic Planning Facilitation
- Five-Year Strategic Planning
- Strategic Thinking Workshops
- Board and Executive Strategy Consultation
- Vision, Mission, and Values Facilitation
- SWOT Analysis

MSS SUCCESS SPACES
Units 2K–2L, 2nd Floor E.C. Valle Commercial Center M.L. Quezon Avenue Brgy. San Isidro, Angono, Rizal
(02) 7255 5568
0995 846 2495 | 0917 123 1017
info@msscorporation.com.ph
www.MSSCorporation.com.ph

- PESTLE Environmental Scanning
- Root-Cause Analysis
- Strategy Map Development
- Balanced Scorecard Development
- KPI and Performance Measure Development
- Target Setting
- Strategic Initiative Development
- Departmental Cascading
- Tactical and Action Planning
- Strategy Execution Workshops
- Executive Strategic Planning Coaching
- Strategic Plan Documentation
- Post-Planning Review and Advisory

A strategic plan should answer more than:
“Where do we want to go?”

It should also answer:
Why does it matter?
What must change?
How will we measure progress?
Who owns the result?
What will we do differently?
And how will we know the strategy is actually working?

Clarify the future. Diagnose the present. Align the organization. Measure what matters. Execute the strategy.