MERCURY

Strategic Planning and Execution with Performance Measurement

28 June – 9 July 2027
Rome (Italy)



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Strategic Planning and Execution with Performance Measurement

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Strategic Planning and Execution with Performance Measurement is a 2-week course for managers, planners and performance staff who must turn a strategic plan into measured results. Over two weeks you build the plan, set its indicators, run progress reviews and adjust the plan while it is being executed. You leave with a finished Strategy Execution Scorecard for your own unit, delivered by Mercury Training Center.

About This Course

Many plans are approved and then lose sight of whether they are working. Targets drift, reports arrive late and nobody adjusts course. To follow, you should already contribute to plans or budgets at work. You practice on cases each day and build your own scorecard step by step, with a full second week devoted to measurement and review.

Who It Is For

- Leaders who own a unit's direction and answer for its yearly targets.
- Planning and strategy staff who draft plans and coordinate their annual review.
- Performance and reporting staff who collect indicators and prepare progress reports.
- Project and initiative leads who deliver the actions a strategy depends on.
- Internal communication and change staff who carry strategic messages to teams.

This course is not for readers new to managing people or budgets, who will gain more from a general management foundations course first, nor for board members who need only a short overview, who are better served by a brief executive briefing on strategy.

Competencies You Will Build

- Strategic Analysis: you read the internal and external position of your unit and turn it into clear priorities.
- Objective Setting: you write objectives that can be measured and that teams can act on.
- Indicator Design: you choose a small set of leading and lagging indicators and define each one precisely.
- Execution Planning: you assign actions, owners, resources and deadlines that match the strategy.
- Performance Review: you run regular reviews that compare results with targets and lead to decisions.
- Strategic Communication: you explain the plan and its progress to staff and stakeholders in plain terms.

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What You Will Be Able to Do

By the end of the course you will be able to:

- From a mission, vision and situation analysis, draft three to five strategic priorities for your unit.
- Given a strategic priority, break it into SMART objectives with a baseline and a target for each.
- Using a balanced scorecard layout, link objectives, indicators and initiatives on one page.
- Given a set of quarterly results, identify the gaps and propose corrective actions.
- From a stakeholder map, prepare a communication plan that reports progress to each group.
- Using a risk register and scenarios, decide when a plan must be adjusted and how.

Course Content

Day 1: Foundations of Strategic Planning

- Strategy, Plans, Goals and Tactics Distinguished for a Business Unit
- Strategic Planning Models Compared for Public and Private Organizations
- Mission, Vision and Values Statements Drafted for a Service Department
- Components of a Workable Strategic Plan Checked Against a Sample Plan
- Planning Cycle Calendar Linked to the Annual Budget Process

Day 2: Situation Analysis and Priorities

- SWOT Analysis Applied to an Operations Division
- Stakeholder Expectations Gathered Through Structured Interviews
- Strategic Options Screened With a Prioritization Matrix
- Strategic Priorities Selected for a Three-Year Planning Horizon
- Assumptions Log Recorded for Later Review

Day 3: Measurable Objectives

- SMART Objectives Written for Each Strategic Priority
- Long-Term Goals Broken Into Annual and Quarterly Objectives
- Baselines Established From Existing Operational Data
- Team Objectives Cascaded From Organizational Objectives
- Objective Quality Review Using a Peer Checklist

Day 4: Execution Planning and Resources

- Action Plans With Owners, Milestones and Deadlines for Each Objective
- Budget and Headcount Aligned With Strategic Priorities
- Resource Management Plan for Shared Teams Across Departments
- Responsibility Matrix for Cross-Functional Initiatives
- Project Management Tools Selected to Track Initiative Progress

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Day 5: Communicating the Plan

- Stakeholder Map Built for Internal and External Audiences
- Key Messages Tailored to Executives, Supervisors and Frontline Staff
- Leadership Briefing Prepared to Launch the Strategy
- Digital Channels Chosen for Team-Wide Strategy Updates
- Feedback Channels Set Up to Capture Staff Questions and Concerns

Day 6: Indicator Design

- Leading and Lagging Indicators Defined for Each Objective
- KPI Definition Sheets With Formula, Source, Frequency and Owner
- Financial and Non-Financial Measures Balanced for a Support Function
- Targets and Tolerance Bands Set From Baselines
- Indicator Overload Reduced by Separating KPIs From Routine Statistics

Day 7: Balanced Scorecard and Reporting

- Balanced Scorecard Perspectives Applied to a Unit Strategy
- Strategy Map Linking Objectives Across the Four Perspectives
- Performance Dashboard Layout for Monthly Management Meetings
- Data Collection Routines Agreed With Data Owners
- Data Analytics Used to Interpret Trends in Indicator Results

Day 8: Progress Reviews and Change

- Quarterly Strategy Review Meeting Agenda and Decision Log
- Variance Analysis Applied to Missed and Exceeded Targets
- Plan-Do-Check-Act Cycle Used to Refine Underperforming Initiatives
- Change Management Steps to Win Staff Buy-In for Revised Priorities
- Resistance to Change Addressed in a Restructured Team

Day 9: Risk, Adaptation and Stakeholder Reporting

- Strategic Risk Register With Likelihood, Impact and Owners
- Scenario Planning for Economic and Political Shifts Affecting the Plan
- Contingency Plans Prepared for High-Impact Risks
- Stakeholder Progress Reports and Satisfaction Measures
- Continuous Improvement Routines That Keep the Plan Current

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Day 10: Building and Testing Your Scorecard

- Exercise: Priorities and SMART Objectives Finalized for Your Own Unit
- Exercise: KPI Definition Sheets Completed for Your Objectives
- Exercise: Mock Quarterly Review Run With Sample Results and a Decision Log
- Exercise: Progress Communication Plan Drafted for Your Stakeholders
- Strategy Execution Scorecard Completed and Presented for Peer Review

Case Studies and Exercises

The following are suggested activities and may be adapted to the group.

- Case study: a hospital support services department with too many indicators; you decide which five to keep and how to define them.
- Case study: a manufacturing plant whose cost-reduction plan stalls halfway through the year; you analyze the variance and revise the action plan.
- Exercise: a government service agency preparing to launch a new strategy; you produce the key messages for three staff groups.
- Exercise: a retail bank branch network facing a sudden market change; you build two scenarios and choose a contingency response.

What You Take Back

You take back the Strategy Execution Scorecard, a one-page link between your priorities, objectives, indicators and initiatives, with the routines that keep it current. In your first month back you use it to agree targets with your manager, start data collection and hold the first progress review with your team.

- Strategic priorities and SMART objectives with baselines and targets.
- KPI definition sheets for each leading and lagging indicator.
- An initiative action plan with owners, milestones and resources.
- A quarterly review agenda, decision log and progress communication plan.

Quick Answers FAQ

What should I know before a strategic planning and performance measurement course?

You should already take part in planning, budgeting or reporting at work and be comfortable reading basic operational figures. No statistics background is needed. The course builds the plan first and then adds indicators, reviews and adjustments on top of it.

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How does strategic planning with performance measurement differ from a general strategic management course?

A general strategic management course concentrates on analysis and choosing a direction. This course spends half its time after the plan is written: defining indicators, building a scorecard, running progress reviews and adjusting initiatives as results arrive.

Why do strategic plans fail during execution?

Plans usually fail because objectives are vague, nobody owns the actions, and progress is not reviewed often enough to correct course. Clear indicators, named owners and a fixed review rhythm turn a plan document into decisions that are made and followed up.

What do I take back from strategic planning and execution training?

You take back a completed Strategy Execution Scorecard for your own unit, with defined indicators, an initiative action plan, a review agenda and a communication plan that you can put to use in your first progress review.

For Your Manager

After this course, your team member can turn the unit's strategy into measurable objectives, define the indicators that track them and run structured progress reviews that lead to clear decisions. They return with a Strategy Execution Scorecard for the unit, ready to be used at the next planning or quarterly review meeting.