FROM ANALYSIS TO ACTION

A Practical Strategy Workshop Kit

A step-by-step workbook for understanding your current position, making strategic choices, and building an action plan.

Designed for practical use

Use this workbook independently or with a leadership team. Each step includes a brief definition, completion guidance, questions, and a worksheet.

Houda Latrach

MBA in Practice | houdalatrach.com

STEP 0

How to Use This Kit

Complete the steps in order. The analysis becomes more useful when each conclusion is supported by evidence and translated into a clear implication.

What this kit does

It helps you organize evidence, identify the issues that matter, compare strategic options, make choices, and assign actions. It does not replace leadership judgment or market research.

Recommended participants

- Decision owner or sponsor
- Leaders from the main functions affected by the decision
- People close to customers and frontline operations
- A facilitator or note-taker
- Subject-matter experts invited for specific sections

Recommended workshop format

Option	Suggested approach
One full day	Complete Steps 1 to 6 before lunch. Complete Steps 7 to 10 after lunch.
Two half-days	Session 1: situation analysis. Session 2: options, choices, and action plan.
Self-guided	Complete one step at a time. Validate assumptions with colleagues before finalizing the SWOT and priorities.

Rules for stronger analysis

- Separate facts from assumptions.
- Record the source or evidence behind important findings.
- Limit each framework to information relevant to the decision.
- Use the “So what?” prompt to explain why a finding matters.
- Do not treat SWOT as the first step. Use it to summarize earlier analysis.
- End with choices, owners, dates, and measures.

STEP 0

The 10-Step Strategy Process

The sequence moves from defining the decision to understanding the situation, creating options, choosing priorities, and executing.

Step	Purpose	Main output
1. Define the challenge	Clarify the decision and scope.	Decision statement and success criteria
2. PESTEL	Assess broad external changes.	Prioritized opportunities and threats
3. Five Forces	Assess industry pressure and profit potential.	Competitive pressure assessment
4. 5Cs	Understand company, customers, competitors, collaborators, and context.	Market perspective
5. Internal assessment	Review capabilities, performance, resources, and constraints.	Evidence-based strengths and weaknesses
6. SWOT	Synthesize the most important findings.	Short strategic situation summary
7. TOWS and options	Turn findings into possible strategic responses.	Three to five realistic options
8. Prioritize	Compare options using consistent criteria.	Ranked priorities
9. Make choices	Define where to play, how to win, and trade-offs.	Strategy choice statement
10. Action plan	Assign actions, measures, and review dates.	90-day plan and 12-month roadmap

Important

Do not complete every possible framework for its own sake. Use each tool to answer the decision defined in Step 1.

STEP 1

Define the Strategic Challenge

Start with the decision. A focused question prevents the workshop from becoming a collection of unrelated observations.

Definition

A strategic challenge is a decision, problem, or opportunity that affects the organization's direction, competitive position, customers, capabilities, or allocation of resources.

How to complete this step

1. Describe the situation in one or two sentences.
2. State the decision that leaders need to make.
3. Identify the decision owner.
4. Set the timeframe covered by the decision.
5. Define what success would look like.
6. List what is inside and outside the scope.

Example

Weak question

How do we grow?

Stronger question

Which customer segment and market position should we prioritize over the next 18 months to produce profitable growth without exceeding our operating capacity?

Decision brief worksheet

Field	Your response
Current situation	
Decision to be made	
Decision owner	
Timeframe	
Success criteria	
In scope	

Field	Your response
Out of scope	
Key stakeholders	
Known constraints	
Critical assumptions to test	

STEP 2

Analyze the External Environment with PESTEL

Identify external changes that the organization does not control but must anticipate, respond to, or use.

Definition

PESTEL organizes broad external factors into Political, Economic, Social, Technological, Environmental, and Legal categories. These factors can create opportunities, threats, constraints, or uncertainty.

Factor	Brief definition	Examples of questions
Political	Government priorities, public policy, taxation, trade, funding, and political stability.	Are grants, trade rules, public spending, or policy changes affecting the decision?
Economic	Conditions affecting demand, cost, access to capital, pricing, and purchasing power.	What are inflation, interest rates, employment, income, and market growth doing?
Social	Changes in demographics, values, lifestyles, expectations, and behaviour.	How are customer needs, population trends, or attitudes changing?
Technological	New or changing technologies affecting products, processes, channels, data, or competition.	Which technologies lower barriers, change customer expectations, or create obsolescence risk?
Environmental	Climate, resource use, waste, sustainability expectations, and physical environmental risks.	Do customers, regulators, or operations require a different environmental response?
Legal	Laws, regulations, standards, contracts, and compliance requirements.	Which rules affect products, labour, privacy, competition, claims, or market entry?

How to complete PESTEL

7. Research changes relevant to the decision and timeframe.
8. Describe the trend or event, not only the category.
9. Record evidence and the source.
10. Classify it as an opportunity, threat, or mixed effect.
11. Rate impact and likelihood.
12. Write the strategic implication: what might the organization need to do?

STEP 2

PESTEL Worksheet

Record only factors with a meaningful connection to the strategic challenge.

Factor	Trend or change	Evidence or source	O / T / Mixed	Impact 1-5	Likelihood 1-5	So what? Strategic implication

Quality check

A statement such as “technology is changing quickly” is too general. Name the technology, explain the change, and connect it to customers, cost, capabilities, competition, or risk.

STEP 3

Assess Industry Structure with Porter's Five Forces

Look beyond direct competitors to understand the forces that affect competitive pressure, bargaining power, and the ability to earn attractive returns.

Definition

Porter's Five Forces is an industry analysis tool. A force is stronger when it places more pressure on prices, costs, differentiation, customer loyalty, or profitability.

Force	What it means	Signs the force is strong
Rivalry among existing competitors	The intensity of competition between organizations already serving the market.	Many similar competitors, slow market growth, low switching costs, frequent discounting, high fixed costs, or weak differentiation.
Threat of new entrants	How easily new competitors can enter and compete successfully.	Low startup costs, easy access to customers or suppliers, limited regulation, weak brand loyalty, or little scale advantage.
Threat of substitutes	The availability of different products or approaches that solve the same customer need.	Customers can meet the need another way, substitutes are cheaper or more convenient, or switching is easy.
Buyer bargaining power	The ability of customers or intermediaries to demand lower prices, stronger service, or better terms.	Few large buyers, easy comparison, low switching costs, price sensitivity, or buyers can produce the solution themselves.
Supplier bargaining power	The ability of suppliers to raise prices, restrict supply, reduce quality, or impose terms.	Few suppliers, specialized inputs, high switching costs, no close input alternatives, or suppliers can sell directly to customers.

Important distinction

Rivalry refers to direct competitors. Substitutes are different solutions to the same need. For example, a meal-delivery company competes directly with other meal-delivery companies, while grocery shopping, restaurant dining, and home cooking are substitutes.

STEP 3

Five Forces Assessment

Rate each force from 1, low pressure, to 5, high pressure. Support the rating with evidence.

Force	Evidence and observations	Pressure 1-5	Why this rating?	Strategic implication

Guiding questions

Force	Questions to discuss
Rivalry	How many credible competitors exist? Is the market growing? How often do competitors discount? How different are the offers?
New entrants	What investment, expertise, regulation, scale, reputation, data, or distribution access is required to enter?
Substitutes	What else can customers do instead? How does the substitute compare on price, convenience, quality, or outcomes?
Buyers	How concentrated are customers? How easily can they switch? How much price information do they have?
Suppliers	How many alternatives exist? How specialized are the inputs? What happens if a supplier changes terms or fails?

Interpretation

High pressure does not always mean “do not enter.” It means the strategy needs a credible response, such as differentiation, switching costs, scale, partnerships, niche focus, or a stronger cost position.

STEP 4

Build the Market Perspective with the 5Cs

Connect the organization’s capabilities with customer needs, competitor behaviour, partners, and the surrounding context.

Definition

The 5Cs framework examines Company, Customers, Competitors, Collaborators, and Context. It gives a more complete market view before selecting a target, position, or growth path.

C	Brief definition	Questions
Company	The organization’s goals, offer, resources, brand, performance, and capabilities.	What do we do well? What limits us? Which outcomes matter most?
Customers	The people or organizations whose needs, behaviour, value, and willingness to pay shape demand.	Who buys, uses, influences, or rejects the offer? Which needs are underserved?
Competitors	Direct and indirect alternatives competing for the same customer, budget, attention, or need.	Who is winning and why? Where are competitors vulnerable or difficult to match?
Collaborators	Partners that help create, deliver, sell, support, or influence the offer.	Which suppliers, distributors, platforms, agencies, or alliances are critical?
Context	External conditions affecting the market, often informed by PESTEL.	Which economic, technological, social, political, legal, or environmental factors matter most?

5Cs worksheet

Area	Most important findings	Evidence	So what?

Area	Most important findings	Evidence	So what?

STEP 4

Customer and Competitor Focus

Use this page when the strategic challenge depends heavily on target selection, positioning, retention, or market entry.

Customer segment worksheet

Segment	Need or problem	Buying criteria	Current behaviour	Value potential	Barriers or concerns

Competitor comparison

Competitor or alternative	Target customer	Value proposition	Strengths	Weaknesses	Likely response

Quality check

Avoid defining a segment only by age or industry. Include a shared need, behaviour, value, decision process, or problem that affects how the group buys and uses the offer.

STEP 5

Complete the Internal Assessment

Identify the capabilities, resources, performance patterns, and constraints that affect what the organization can execute.

Definition

An internal assessment evaluates what the organization controls or strongly influences. It should distinguish a true strength from a normal capability and a material weakness from a temporary inconvenience.

Areas to review

Area	What to examine
Customers and brand	Satisfaction, loyalty, reputation, value proposition, segment fit, retention, and customer insight.
Financial position	Revenue quality, margin, cash, investment capacity, cost structure, and funding constraints.
People and organization	Skills, capacity, leadership, culture, incentives, roles, decision rights, and key-person dependency.
Operations	Process performance, quality, speed, capacity, supply chain, service delivery, and scalability.
Technology and data	Systems, integration, automation, data quality, analytics, security, and technical debt.
Marketing and sales	Reach, conversion, channels, pricing, customer acquisition, pipeline, and sales capability.
Innovation and learning	Ability to test, learn, improve, launch, and adapt.
Partnerships and assets	Contracts, channels, intellectual property, facilities, licenses, relationships, and physical assets.

What counts as a strength?

A strength should be relevant to the strategic challenge, supported by evidence, and useful in creating value or reducing risk. A capability is more strategically important when customers value it, competitors struggle to copy it, and the organization can use it consistently.

STEP 5

Internal Assessment Worksheet

Record evidence, not only opinions. Compare performance with targets, past results, competitors, or customer expectations when possible.

Area	Finding	Evidence or measure	Strength / Weakness / Neutral	Strategic importance 1-5	So what?

Key-person dependency

When critical knowledge, relationships, decisions, or processes depend on one person, the organization faces continuity and execution risk. Responses include documentation, cross-training, succession planning, shared access, role clarity, and process ownership.

STEP 6

Synthesize the Analysis with SWOT

Use SWOT after the external and internal assessment. It should summarize the few findings most likely to influence the decision.

Definition

SWOT organizes internal Strengths and Weaknesses with external Opportunities and Threats. Strengths and weaknesses are mainly inside the organization. Opportunities and threats arise mainly outside it.

Quadrant	Meaning	Good test
Strength	An internal capability, resource, asset, or performance advantage that supports the strategy.	Is it relevant, supported by evidence, and useful?
Weakness	An internal limitation, gap, dependency, or underperformance that restricts the strategy.	Does it materially affect execution, value, cost, risk, or growth?
Opportunity	An external condition the organization might use to create value or improve its position.	Is there a real need, timing advantage, or market opening, and do we have a path to pursue it?
Threat	An external condition that might reduce value, increase cost, weaken the position, or create risk.	How likely and material is it, and what would be affected?

SWOT selection rules

- Limit each quadrant to three to five high-priority items.
- Write specific statements, not single words.
- Remove duplicates and generic phrases.
- Connect each item to evidence from earlier steps.
- Rank items by strategic importance.

STEP 6

SWOT Worksheet

Select the findings that deserve leadership attention. Do not copy every observation from earlier pages.

STRENGTHS	WEAKNESSES

OPPORTUNITIES	THREATS

SWOT priority summary

Priority finding	Evidence	Why it matters now	Rank 1-10

Priority finding	Evidence	Why it matters now	Rank 1-10

STEP 7

Create Strategic Options with TOWS

Move from diagnosis to possible responses by connecting internal and external findings.

Definition

TOWS uses the SWOT findings to generate options. It asks how strengths can support opportunities, how strengths can reduce threats, how weaknesses might be addressed to pursue opportunities, and how exposure can be reduced when weaknesses and threats combine.

Combination	Purpose	Prompt
SO: Strengths + Opportunities	Use strengths to pursue attractive opportunities.	How can we use what we do well to capture this opportunity?
ST: Strengths + Threats	Use strengths to reduce or respond to threats.	Which strength helps protect our position or improve resilience?
WO: Weaknesses + Opportunities	Address weaknesses that block an opportunity.	What must we build, buy, partner for, or change to pursue the opportunity?
WT: Weaknesses + Threats	Reduce vulnerability and avoid unacceptable exposure.	What should we stop, simplify, protect, insure, exit, or redesign?

Option design rules

- Write options as choices or approaches, not isolated tasks.
- Include the target customer or area of focus.
- Explain how the option creates value or reduces risk.
- Identify the capabilities the option requires.
- Include a realistic alternative, including maintaining the current direction when relevant.

STEP 7

TOWS and Strategic Options Worksheet

Generate several options before evaluating them. Do not choose the preferred answer too early.

TOWS combination	Connected SWOT items	Possible strategic response

Strategic option cards

Option	Target or focus	How it creates value	Capabilities required	Main risks

STEP 8

Prioritize the Options

Compare options using the same criteria. Scoring supports discussion, but judgment should remain visible.

Definition

Prioritization ranks options by their expected contribution and practicality. A high-impact option is not automatically the best choice if it is unaffordable, inconsistent with the strategy, or dependent on unavailable capabilities.

Criterion	Definition	Suggested weight
Strategic fit	Alignment with the challenge, purpose, target customer, and desired position.	20%
Customer or stakeholder value	Expected improvement in outcomes customers or key stakeholders value.	20%
Financial or operational impact	Expected revenue, margin, cost, capacity, quality, speed, or risk effect.	20%
Feasibility	Availability of time, funding, skills, systems, partners, and leadership capacity.	15%
Time to value	How quickly meaningful benefits or learning will appear.	10%
Risk and uncertainty	Execution, market, financial, legal, reputational, and dependency risk.	15%

Score each option from 1 to 5. For risk, use 5 for lower or manageable risk and 1 for high or poorly understood risk. Adjust the weights to fit your decision.

STEP 8

Option Scoring Worksheet

Use the weighted score as an input to discussion. Record the reason behind the score.

Option	Fit 20%	Value 20%	Impact 20%	Feasibility 15%	Time 10%	Risk 15%	Weighted total	Decision / rationale

Leadership judgment check

- Which assumptions have the greatest effect on the ranking?
- What information would change the decision?
- Which option creates an irreversible commitment?
- Which option allows a low-cost test before a larger investment?
- What are the consequences of doing nothing?

STEP 9

Make the Strategic Choices

Translate the analysis into a clear direction that guides decisions across functions.

Definition

A strategy choice states where the organization will focus, how it intends to create value or win, which capabilities it needs, and which opportunities it will decline or delay.

Choice	Questions
Winning aspiration	What meaningful outcome are we trying to achieve?
Where to play	Which customers, needs, products, channels, geographies, or parts of the value chain will receive priority?
How to win	Why should the selected customers choose us? What advantage or distinctive value will we create?
Required capabilities	Which skills, processes, technology, assets, partnerships, and leadership practices must be strong?
Management systems	Which measures, routines, incentives, governance, and decisions will sustain the strategy?
Trade-offs	What will we stop, decline, simplify, postpone, or avoid because it does not support the direction?

Strategy choice statement

Template

Over the next [timeframe], we will focus on [where to play] by delivering [distinctive value / how to win]. We will build or strengthen [required capabilities]. We will not prioritize [trade-offs]. Success will be measured through [outcomes].

STEP 10

Build the 90-Day Action Plan

Convert the chosen direction into a limited set of actions with clear ownership, measures, dependencies, and review dates.

Definition

An action plan specifies what will be done, by whom, by when, and how progress or results will be measured. It should distinguish actions, outputs, outcomes, and assumptions.

Term	Meaning	Example
Action	The work to be completed.	Interview 20 target customers.
Output	The immediate deliverable produced.	Validated customer-needs summary.
Outcome	The result the action should influence.	Higher conversion within the target segment.
Measure	The indicator used to track progress or results.	Conversion rate, repeat purchase, margin, cycle time.
Dependency	Something required before or during execution.	Data access, legal review, system change, supplier agreement.
Risk	An event or condition that might prevent success.	Low response rate, capacity shortage, delayed integration.

90-day action plan worksheet

Priority	Action	Owner	Start	Due	Output / measure	Dependency	Risk / mitigation	Status

Priority	Action	Owner	Start	Due	Output / measure	Dependency	Risk / mitigation	Status

STEP 10

Build the 12-Month Roadmap

Show the sequence of major milestones, decisions, tests, investments, and capability development.

Strategic priority	Q1 milestone	Q2 milestone	Q3 milestone	Q4 milestone	Owner	Success measure

Review rhythm

Review	Purpose	Suggested frequency
Action review	Resolve blockers and confirm delivery progress.	Every two to four weeks
Performance review	Review measures, assumptions, and early outcomes.	Monthly or quarterly
Strategy review	Assess whether the choices still fit the environment and evidence.	Quarterly or when a material change occurs
Annual refresh	Update the situation analysis and strategic priorities.	Annually

Avoid activity-only reporting

A completed action is not the same as a successful outcome. Review whether the work changed customer value, financial performance, operating capability, competitive position, or risk.

STEP FINAL

One-Page Strategy Summary

Use this page to communicate the decision, logic, priorities, and execution commitments to leaders and teams.

Section	Summary
Strategic challenge	
Key external findings	
Key internal findings	
Priority customers / where to play	
Value proposition / how to win	
Required capabilities	
Three to five strategic priorities	
Trade-offs / not prioritized	
90-day commitments	
Success measures	
Review date and decision owner	

STEP GUIDE

Facilitator Guide

Use these prompts to keep the discussion focused, evidence-based, and decision-oriented.

Moment	Facilitator prompt
Opening	What decision must be clearer by the end of this session?
When opinions conflict	What evidence supports each view? What would help us test the assumption?
When the group becomes too broad	How does this point affect the decision in scope?
After each framework	What does this mean for our choices, risks, capabilities, or timing?
During SWOT	Which three to five findings in each quadrant deserve leadership attention?
During option design	What credible alternative are we missing?
During prioritization	Which scoring assumptions drive the result?
Before finalizing	What are we choosing not to do?
During action planning	Who owns the action, what is the due date, and what result will show progress?

Common workshop problems

Problem	Response
The session becomes brainstorming without evidence.	Require an evidence field and label assumptions.
SWOT contains long generic lists.	Limit each quadrant and use findings from prior analysis.
The group selects a solution too early.	Generate and compare at least three credible options.
Everything becomes a priority.	Require trade-offs and apply weighted criteria.
The plan contains activities but no outcomes.	Add measures and state the expected business effect.
No one owns follow-through.	Assign one accountable owner and a review date for every priority.

STEP APPENDIX

Evidence and Assumption Log

Use this log throughout the workshop to separate verified information from assumptions requiring validation.

ID	Finding or assumption	Type: fact / assumption	Source or evidence	Confidence Low/Med/High	Validation action	Owner	Due

STEP APPENDIX

Quick Strategy Glossary

Use these short definitions while completing the workbook.

Term	Brief definition
Capability	An ability the organization performs through people, processes, technology, knowledge, assets, and routines.
Competitive advantage	A source of customer value or cost advantage that competitors struggle to match or replace.
Customer segment	A group with shared needs, behaviours, value, or buying characteristics that support a distinct approach.
Differentiation	Creating meaningful value customers recognize as distinct from alternatives.
Evidence	Reliable information supporting a finding, such as data, research, customer feedback, benchmarks, or observed performance.
Key performance indicator	A measure used to track performance against an important objective.
Risk	An uncertain event or condition that might affect objectives.
Strategic fit	The degree to which an option aligns with the organization's goals, position, capabilities, and environment.
Trade-off	A deliberate choice to prioritize one path, customer, capability, or outcome over another.
Value proposition	A clear statement of the value offered to a target customer and why it is preferable to alternatives.
Where to play	The customers, needs, products, channels, geographies, or value-chain positions selected for focus.
How to win	The distinctive approach used to create value and earn preference in the selected area.

Strategy becomes useful when analysis leads to choices,
and choices lead to owned action.

Houda Latrach

MBA in Practice | houdalatrach.com