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Acing Your Strategy: Business Planning

Many businesses work hard and still drift. The owner is busy every day, customers are served, bills are paid — yet year after year the business stands in roughly the same place, vulnerable to the same competitors, the same rising costs, and the same dependence on a few customers or one person's energy. Hard work was never the missing ingredient. Direction was. Strategy, stripped of its grand language, is simply the set of choices that gives hard work a direction: which customers you will serve and which you will not, what you will be known for, how you will win against alternatives, and what you will deliberately stop doing so the chosen work has room to breathe. Acing Your Strategy: Business Planning is a practical system for making those choices clearly, writing them into a plan a small business can actually follow, and testing them against reality before reality tests them for you.

This system builds your strategy in five moves. First, you look honestly at where the business stands today — its strengths, weaknesses, customers, competitors, and money. Second, you choose a clear position: the specific customers, the specific promise, and the reason those customers should choose you. Third, you turn the position into objectives and a small number of strategic moves — the big efforts that will actually change your position over the next one to three years. Fourth, you convert strategy into a working business plan: actions, owners, dates, and money, quarter by quarter. Fifth, you watch the outside world and your own results on a rhythm, and adjust the strategy in writing when the evidence demands it — neither clinging to a dead plan nor chasing every new fashion.

This work helps owners and managers of small and growing businesses, and team leads asked to plan beyond the next busy month. It helps most when the business is stuck at a plateau, when growth has made the old informal way of working creak, when a new competitor or a changing market is pressing, or when the owner wants the business to become less dependent on their personal presence in every decision. You do not need business-school language to do it. Every technical word in this set is explained in plain terms when it first appears, and every step can be done with paper, records you already have, and honest conversation.

It matters because strategy is happening whether you choose it or not. A business with no chosen position still ends up positioned — by accident, by its loudest customer, by its cheapest competitor's prices. Choosing deliberately does not guarantee success, and this set promises no outcomes. What it guarantees, if you do the work, is that your effort points somewhere chosen, your plan's money and time agree with your words, and your adjustments come from evidence rather than panic or drift. By the end you will know how to assess your business truthfully, choose and state a position, set objectives and moves that fit your real capacity, build the plan that carries them, and keep the strategy alive through regular, honest review.

What You Will Learn

- How to assess your business as it truly stands — strengths, weaknesses, customers, competitors, and money — using records and customer evidence.

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- How to read the outside world for opportunities and threats that actually affect your business, and ignore the noise that does not.
- How to choose a position: the specific customers you serve, the promise you make them, and the reason they should choose you over alternatives.
- How to test a position for honesty — whether your business can truly deliver it, afford it, and prove it to customers.
- How to turn a position into a few measurable objectives and a small set of strategic moves over one to three years.
- How to convert strategy into a working plan with actions, owners, dates, budgets, and quarterly stages.
- How to spot the strategic traps — copying competitors, serving everyone, competing only on price — before they capture your plan.
- How to review strategy on a rhythm, read early warning signs, and adjust in writing without lurching or drifting.

Lesson 1 — Know Where You Stand: The Honest Assessment

Strategy begins with the truth about today, and the truth has an inside half and an outside half. The inside half is your business as it actually is. Strengths are capabilities you can prove: skills, reputation, equipment, location, relationships, or systems that customers or records confirm — not qualities you merely feel you have. "Customers return because our repairs last" is a strength if your repeat figures and low rework rate back it. "We give great service" is a hope until evidence arrives. Weaknesses are the mirror: the gaps that cost you work, money, or sleep — the skill only one person holds, the product that consumes time and returns little, the bookkeeping that is always a month behind, the premises that limit the work you could take. List both with evidence beside each item, gathered from records: sales by product or service, repeat-customer share, complaint and rework notes, cost figures, and the honest testimony of the people who do the work daily, who usually know the weaknesses precisely and have simply never been asked in a structured way.

The outside half is the world your business operates in. Customers first: who actually buys from you now — not who you imagine — in what numbers, for what reasons, gathered from your own records and, where possible, from asking them. Competitors second: the real alternatives your customers have, including the alternative of doing nothing or doing it themselves. Study what those alternatives offer, charge, and do better or worse than you, from public information and customer comments — factually, without bitterness; a competitor you refuse to understand is a competitor who will keep surprising you. Third, the wider conditions that genuinely touch your business: local changes, supplier markets, technology your customers are adopting, rules that apply to your trade. The discipline is relevance. The outside world produces infinite news; your assessment needs only the changes that could plausibly reach your customers, your costs, or your ability to deliver within the next few years.

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From the two halves, draw the short lists this lesson exists to produce: your proven strengths, your costly weaknesses, the real opportunities — outside changes or unmet customer needs your strengths could serve — and the real threats — outside changes that could harm you, especially where they meet a weakness. A threat that meets a strength is usually manageable. A threat that meets a weakness is where businesses get hurt, and your strategy in later lessons must speak to those junctions by name. Keep the whole assessment to a few pages. An assessment that takes a month to write describes a business that no longer exists by the time it is finished.

The Steps

1. List your offers and, from records, write what each actually earned and cost over the last year. Mark the strongest, the weakest, and any you cannot measure — and why not.

2. Write your strengths, each with its proof: figures, repeat rates, rework or complaint records, or named customer evidence. Demote anything without proof to "believed strength — to test."

3. Write your weaknesses, each with its cost in money, time, lost work, or risk. Ask the people who do the daily work what they would put on this list, and record their answers seriously.

4. Describe your real current customers from records: who they are, how many, how many return, and what they buy most. Note any customer group whose loss would seriously wound the business.

5. List your customers' real alternatives, including doing nothing. For each main competitor, note from public information and customer comments what they offer, charge, and do better or worse than you.

6. Note the outside changes that could plausibly affect your customers, costs, or delivery within three years. Cut anything you cannot connect to your business in one sentence.

7. Draw the four short lists — strengths, weaknesses, opportunities, threats — and circle every place a threat meets a weakness. Those junctions are mandatory reading for Lesson 2.

A Worked Example

Imran owns a small accountancy practice serving local shops and tradespeople. His assessment replaces several comfortable stories with evidence. His believed strength was "personal service," and the records support a sharper version: his repeat rate is very high and his clients stay for years, but his notes show the real reason — he answers questions in plain language and returns calls the same day, two specific habits, not a vague warmth. His figures expose a weakness he had felt but never priced: preparing year-end accounts for his smallest clients consumes a third of his team's hours for a small share of income, because the process was designed for larger clients and never simplified. His customer picture shows a concentration risk: five clients provide nearly half his income. His competitor review is clarifying rather than frightening: the large online services beat him clearly on price for simple work, while local clients who tried them and returned cite exactly his two habits — plain language and same-day

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answers — as what the online services lacked. The outside change that matters is his clients' shops adopting new till and invoicing software, which will change what records arrive at his door. His threat-meets-weakness junction is circled in red: if one or two of the five large clients leave, the practice's income drops sharply while its hours stay tangled in low-return small-client work. Imran's strategy, when he builds it, will not be generic growth advice. It will be an answer to this page.

Common Mistakes

- **Strengths without proof.** A strength you cannot evidence is a story you tell yourself, and strategy built on stories collapses on contact with the market. Prove it or mark it "to test."
- **Studying competitors with bitterness instead of curiosity.** Competitors are information about what customers value. Refusing to look clearly at them does not weaken them; it blinds you.
- **Assessing everything except the numbers.** Feelings about products and customers regularly contradict sales, repeat, and cost records. Records first, feelings examined second.
- **Writing an assessment that never ends.** A few honest pages this week beat a perfect study next quarter. Strategy work has a deadline like any other work.

Lesson 2 — Choose Your Position: Who, What Promise, and Why You

Assessment tells you the terrain. Position is the ground you choose to stand on. A position, in plain language, is the answer to three questions a customer could ask. Who is this business for, specifically? What does it promise those people, in terms of the result or experience they care about? And why should they choose this business over their other real alternatives? Until those three answers are specific, the business competes on everything and stands for nothing — which in practice means it competes on price, because price is the only difference a customer can see between vague offers. Specificity feels risky, because naming who you are for means accepting who you are not primarily for. That discomfort is the price of being chosen on purpose instead of by accident.

Build the position from your assessment, not from wishes. The strongest positions grow out of a proven strength meeting a real customer need that alternatives serve poorly. Imran's position practically writes itself from his evidence: for local shopkeepers and tradespeople who want their accounts handled in plain language with same-day answers, his practice is the firm that explains as it goes — unlike the cheap online services, which is precisely the gap his returning clients described. Note the anatomy: a specific who, a promise stated in the customer's terms, and a why-you grounded in a proven strength and a competitor's real weakness. A position that requires strengths you do not have is not ambition; it is fiction. A position that ignores what customers actually value is decoration. Both errors are common, and both are avoidable by keeping Lesson 1's page open while you write.

Test the position with four honest questions before adopting it. Can we deliver this promise consistently, with the people and systems we have or can realistically build within the plan's

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period? Can we afford to deliver it — does the money work at the prices these customers can and will pay? Can we prove it — do we have, or can we gather, the evidence that would make a new customer believe the promise before buying? And is the group of customers large enough, and reachable enough, to sustain the business? A position failing any test is revised now, on paper, where revision is cheap. Also write the position's shadow: the customers and work you will de-prioritise or refuse because they pull against the position. A position with no shadow is not a position; it is a hope to please everyone, and it will be read that way by staff the first time a conflicting demand arrives.

State the final position in two or three sentences anyone in the business can repeat word for word. If your own team cannot say it, customers will never hear it consistently. Post it where planning happens. Every objective, move, and spending decision in the next lessons gets checked against it with one question: does this strengthen our position, or dilute it?

The Steps

1. From your assessment, list the customer groups you could serve. For each, note the need they have that alternatives serve poorly and the strength of yours that meets it.
2. Draft your position in this shape: "For [specific customers] who need [specific need], we provide [promise in the customer's terms], unlike [main alternative], because [proven strength]."
3. Run the four tests in writing: consistent delivery, affordability at realistic prices, provable evidence, and a customer group large and reachable enough to sustain you.
4. Revise the draft until it passes all four tests using only strengths marked proven in Lesson 1. If it needs an unproven strength, add "build and prove that strength" as a candidate strategic move for Lesson 3.
5. Write the position's shadow: the work and customer types you will de-prioritise or decline, and how staff should handle such requests politely and clearly.
6. Reduce the position to two or three sentences. Read them aloud to a team member and ask them to repeat the meaning back. Fix the wording until they can.
7. Write the position at the top of your planning document, dated. Every later choice in this set is checked against it.

A Worked Example

Two sisters, Elena and Rosa, run a tailoring and alterations business. Their first position draft is the classic trap: "For everyone who needs clothing services, we provide high-quality work with friendly service." It names no one, promises what every competitor claims, and gives a customer no reason to choose them over the cheaper shop across town. Their assessment tells a better story. Their records show their most loyal and best-paying customers are professionals needing fast, reliable alterations on work clothing, and performers and wedding parties needing skilled fitting work booked ahead. Their proven strength, backed by repeat figures and thank-you messages, is difficult fitting work done correctly the first time, including garments other shops refused. Their competitor review shows the cheap shops compete on simple hems and speed

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on basics, and regularly decline complex fitting. Their tested position becomes: "For professionals and special-occasion customers who need garments fitted properly — including difficult work others decline — we are the tailors who fit it right the first time and say honestly when a garment cannot be saved, unlike high-volume shops that take only the simple work." The four tests pass: delivery rests on their own proven skill; the customers pay willingly for fitting that protects expensive garments; proof exists in repeat bookings and messages, with more gatherable by asking permission to quote; the group is large enough across their town's offices, theatres, and wedding venues. The shadow is written without apology: simple hemming at rock-bottom prices is de-prioritised — quoted honestly at their real rate, with the cheaper shop named helpfully when a customer only needs that. Within months, staff report the position's quietest benefit: saying no has become easy, because the position says it for them.

Common Mistakes

- **Choosing "everyone" as your customer.** A business for everyone is positioned for no one and competes on price alone. Specificity is what makes you choosable.
- **Promising strengths you do not have.** A position built on wished-for strengths collapses the first time a customer tests it. Build on proven strengths; develop new ones as explicit strategy, not as pretence.
- **No shadow.** If nothing is de-prioritised, the position changes nothing. Write what you will decline, and how, or the old everything-for-everyone habit continues.
- **Position as a slogan only.** A pretty sentence that delivery, prices, and staff behaviour contradict is worse than none. The four tests exist to keep the words welded to reality.

Lesson 3 — Set Objectives and Strategic Moves

A position describes where you will stand. Objectives describe what success looks like from there, in numbers, by dates. Strategic moves are the few big efforts that carry you from today's assessment to those objectives. Lesson 3 builds both, and its governing virtue is smallness. A strategy with twelve objectives and nine moves is not ambitious; it is unstaffed. Most small businesses can carry two to four objectives and two to three major moves at once, alongside the daily work that pays the bills. Everything else — and there will be a list of worthy candidates — goes on a written later list, which is where good ideas wait without stealing this year's hours.

Write each objective with the same anatomy: a result, a measure, a starting point from your assessment, a target, and a date. "Grow the fitting side of the business" is a wish. "Raise revenue from fitting and special-occasion work from its current measured share to a stated higher share of total revenue by the end of next year, measured monthly from the booking book" is an objective: it can be planned, tracked, and honestly declared finished or missed. Choose objectives that cover the position's health, not just its growth — typically one on income or margin, one on the customer base the position names (winning or keeping them, reducing dangerous concentration), and one on capability: the strength, system, or skill the position depends on being built or protected. That third kind is the one owners skip and later regret, because positions die when the strength underneath them is a single exhausted person or an

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unreplaced machine.

Strategic moves are the big, cross-cutting efforts that deliver the objectives — bigger than a task, smaller than a dream. A move might be: build a simplified service for small clients that frees senior hours; develop the referral relationship with the two wedding venues; train a second person in the critical skill; replace the failing equipment with capacity for the position's work. Each move gets an owner, a rough cost in money and hours, a start and finish window, and the objective it serves. If a proposed move serves no objective, it is not strategic, however attractive — it goes to the later list. If an objective has no move that could plausibly deliver it, the objective is exposed as a hope and must be re-scoped until a real move exists. This two-way check, run honestly, is the moment a strategy becomes real.

Sequence the moves across the plan's horizon — usually the next twelve months in detail, with years two and three in outline. Do not start all moves at once. Early moves should be the ones that free resources, reduce the circled risks from Lesson 1, or build the capability later moves depend on. Write the sequence with its reasoning in one short paragraph, so that when pressure comes to reorder — and it will — the original logic is available to argue with, instead of the loudest voice winning by default.

The Steps

1. Draft objectives from your position, covering income or margin, the position's customers, and the capability the position depends on. Limit the set to two to four.
2. Write each objective fully: result, measure, starting point from your assessment figures, target, and date. Reject any objective you cannot measure with records you have or will keep.
3. Brainstorm candidate moves freely, then test each against the objectives: a move that serves no objective goes to the later list, in writing.
4. Test the other direction: for each objective, confirm at least one plausible move exists that could deliver it. Re-scope any objective that fails this test.
5. For each surviving move — two or three in total — write its owner, rough cost in money and hours, start and finish window, and the objective it serves.
6. Sequence the moves across the year, with later years in outline. Start with moves that free resources, reduce circled risks, or build needed capability. Write one paragraph explaining the sequence.
7. Check total load against real capacity, including daily operations. If the moves plus the day job exceed the people's honest hours, cut or defer a move now.

A Worked Example

Kwame runs a small web-design studio of four people, positioned — after Lessons 1 and 2 — for local service businesses that need websites which bring in enquiries, maintained reliably month to month, unlike build-and-disappear freelancers. His assessment circled a familiar junction: income depends on a stream of one-off projects, while his proven strength and his clients' praise centre on dependable ongoing care. His objectives, fully written, are three.

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Income stability: raise recurring maintenance income from its current measured level to cover the studio's fixed costs by the end of month twelve, measured from the accounts each month. Customers: sign a stated number of the position's target businesses to care plans by year end, starting from the current count in his client list. Capability: by month six, have two team members besides Kwame able to run the full maintenance routine unsupervised, ending the single-person dependency his assessment flagged. His moves are three, sequenced. Move one, months one to three: package the care plan properly — scope, price, and a plain explanation page — owner Kwame, modest cost, serving objectives one and two. Move two, months two to eight: a steady outreach rhythm to past project clients and target businesses, owner his senior designer with Kwame reviewing monthly, serving objective two. Move three, months three to six: document the maintenance routine and train the second and third operators, serving objective three and deliberately scheduled to finish before outreach peaks, so new care clients never land on a one-person system. Two attractive candidates — a redesign of the studio's own site and a new video service — sit on the later list, named and dated for review next year. Kwame's strategy fits on two pages, and every week his team can answer the only question that matters: what are we doing this week that serves a move?

Common Mistakes

- **Objectives without measures or starting points.** Without a start figure and a measure, "progress" becomes a feeling argued monthly. Write the anatomy in full, every time.
- **Too many moves at once.** Simultaneous big efforts in a small team means each gets a fraction of the attention it needs. Two or three, sequenced, actually finish.
- **Moves that serve no objective.** Attractive projects smuggle themselves in as "strategic." The two-way check — every move serves an objective, every objective has a move — keeps the set honest.
- **Ignoring capacity.** A strategy that assumes the team works the day job plus the moves in the same hours is a resignation letter written slowly. Cost the load, then cut to fit.

Lesson 4 — Turn Strategy Into a Working Business Plan

Strategy that never becomes dated, owned, funded work is a speech. Lesson 4 performs the conversion. Take each strategic move and break it into quarterly stages: what will be true at the end of each quarter if this move is on track. Then break the next quarter — only the next one — into monthly actions, each with one owner and a date. Later quarters stay at stage level until their turn comes, because detailing work a year ahead in a changing world wastes effort and creates false precision. This rolling detail is how real plans stay both concrete and adaptable: the near term is exact, the far term is directional, and each quarter's planning session promotes the next quarter from stages to actions using everything learned so far.

Money must be planned with the same honesty. For each move, budget its full cost across the plan: purchases, staff hours at real cost, any training, any marketing spend, and a contingency for the move's surprises. Then set the whole plan against the business's money reality — the month-by-month pattern of income and fixed costs, as in a yearly operating plan. Strategy

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spending that ignores seasonal cash is how good strategies produce bad winters. If the money does not stretch to all moves on their preferred dates, the answer is sequencing and scope, decided now: delay one move's start, narrow its first stage, or extend its window. The answer is never to budget each move at the cost you wish it had. A plan with honest numbers and adjusted dates survives contact with the bank account; a plan with wished numbers does not survive contact with anything.

Give the plan its human structure. Each move's owner reports progress at a fixed rhythm — a short monthly strategy check of under an hour, separate from daily operations talk, asking three questions per move: what stage are we at against the plan, what is blocking, and what decision or help is needed? Decisions needed are made or scheduled in that meeting, not left to corridor chance. Write the plan document itself plainly: position on page one, objectives with their measures, moves with owners and stages, the next quarter's actions, the budget summary, and the check dates. A plan the team can read in fifteen minutes will be read. A forty-page plan will be admired and shelved, which is the same as not existing.

Finally, plan the communication. Everyone affected should hear the position and the moves in the owner's own words, with the shadow from Lesson 2 handled honestly — what the business will do less of, and why — because staff who discover strategy by rumour will invent a worse version. Customers do not need the plan document, but they should feel its effects in consistent promises and delivery. Consistency between what the business says, spends on, and does is what a strategy looks like from outside.

The Steps

1. Break each strategic move into quarterly stages: the position that must be reached by each quarter's end for the move to be on track.
2. Detail only the next quarter into monthly actions, each with one named owner and a date. Leave later quarters at stage level.
3. Budget each move fully: purchases, staff hours at real cost, training, marketing, and a contingency. Total the strategy budget by quarter.
4. Lay the strategy budget against the business's month-by-month money pattern. Where cash cannot carry the planned pace, adjust dates or scope in writing — never the honesty of the numbers.
5. Set the monthly strategy check: fixed date, under an hour, move owners reporting stage, blockers, and decisions needed. Book the year's check dates now.
6. Write the plan document plainly: position, objectives with measures, moves with owners and stages, next quarter's actions, budget summary, check dates. Keep it readable in fifteen minutes.
7. Announce the strategy to everyone affected, in person where possible: the position, the moves, the shadow of what will be done less, and the reasons. Answer questions in the room, not afterwards by rumour.

A Worked Example

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Petra owns a growing physiotherapy clinic, positioned for active adults who want honest, exercise-based recovery rather than endless passive treatment. Her Lesson 3 work produced two moves: extend the clinic's hours with a second treatment room fitted out, and build a structured recovery-programme offer that turns single appointments into guided courses of care. Lesson 4 turns them into a plan. Quarterly stages for the room move: quarter one, quotes and finance confirmed and room design agreed; quarter two, fitting completed in the clinic's quietest month — chosen deliberately from her seasonal records so building noise costs the fewest appointments; quarter three, new hours launched with the second physiotherapist recruited in quarter two, not quarter three, because her assessment taught her recruitment takes a full season. The recovery-programme move stages differently: quarter one, programme designed and priced with her senior clinician as owner; quarter two, piloted with a small group of existing patients at an honest introductory price; quarters three and four, refined from pilot evidence and offered fully. The budget, laid over her monthly money pattern, forces one written adjustment: the room's fitting and the programme's launch marketing cannot both peak in the same quarter, so marketing moves a quarter later, with the reason recorded in the plan. Monthly checks are booked for the first Tuesday, owners named, and the plan document runs to six readable pages. When a supplier delay hits in quarter two, the plan absorbs it without drama: the check meeting sees the stage slip, re-sequences the recruitment advertisement by three weeks, and records the change. Petra's strategy survives its first collision with reality precisely because the plan expected collisions and built the meeting where they get handled.

Common Mistakes

- **Detailing the whole year at action level.** Far-future detail is fiction that consumes real planning time. Next quarter in actions, later quarters in stages, promoted as they approach.
- **Budgeting moves at wished-for costs.** Under-costed strategy collapses mid-move, when abandoning it is most expensive. Full costs, real hours, contingency — then adjust scope or dates.
- **No fixed check rhythm.** Strategy without a monthly meeting place dissolves into daily operations within weeks. Book the checks for the year at planning time.
- **Keeping strategy secret from the team.** People cannot deliver a position they have never heard, and rumour will fill any silence with something worse. Announce it plainly, shadow included.

Lesson 5 — Watch, Learn, and Adjust: Keeping Strategy Alive

The final lesson governs the strategy's life after launch, because the world your assessment described will change — customers shift, competitors move, costs rise, new tools appear — and a strategy that cannot adjust becomes a monument to last year's facts. Adjustment, done by this system, is neither of the two failure modes that kill strategies. The first failure is rigidity: clinging to the plan while evidence accumulates that its facts have changed, usually defended as "staying the course" long after the course leads somewhere the business no longer wants to go. The second is lurching: rewriting the strategy at every setback, fashion, or competitor announcement, so the business never compounds anything and the team learns to wait out

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each new direction. The Builder's middle path is a rhythm of evidence: monthly checks on execution from Lesson 4, and a deeper strategy review every six or twelve months that reopens the assessment and the position themselves — with the same records discipline as Lesson 1.

Learn to read early warning signs, which arrive as small numbers before they arrive as crises. For each objective, name in advance the indicator that would move first if the strategy were failing: enquiry quality falling before sales fall, repeat rate softening before revenue does, a key person's hours climbing before they resign. Watch those indicators at the monthly check. When one moves adversely for two checks in a row, treat it as a question to investigate, not yet a verdict — investigate with facts, in the manner of Lesson 2 of the Clear Decision Builder: what is actually happening, and is it the market, the execution, or the position itself? Each cause has a different cure. Execution failure is fixed by support, resources, or accountability, with the strategy unchanged. Market change may require a move to be reshaped or a stage re-sequenced. Position failure — the evidence that customers do not want the promise, or that you cannot deliver or afford it — is the only finding that reopens Lesson 2, and it requires strong evidence, because positions need time to take hold and most early difficulty is execution, not position.

When adjustment is decided, do it in writing, as a new dated version of the plan, with the evidence and reasoning recorded in a few lines. Versioned adjustment is what separates learning from wandering: at the annual review, the trail of versions shows a business thinking. The annual strategy review itself repeats the whole cycle at a higher level: refresh the assessment, re-test the position against the four tests, score the objectives from records, honour the moves that finished, retire or re-scope those that did not, and set the next period's objectives and moves from evidence rather than enthusiasm. Businesses that run this cycle yearly discover its quiet reward — each year's assessment is faster and truer than the last, because the records, indicators, and version trail from the previous year do the heavy lifting. Strategy stops being an event and becomes the way the business thinks. That, and not any single clever move, is what acing your strategy actually means.

The Steps

1. For each objective, name its early warning indicator — the figure that would move first if things went wrong — and add it to the monthly check's agenda.
2. At monthly checks, separate execution questions from strategy questions. Fix execution in the meeting; log strategy questions for the deeper review unless an indicator demands faster action.
3. Investigate any indicator that moves adversely twice running: gather facts on whether the cause is execution, market change, or the position itself, before proposing any adjustment.
4. Hold a deep strategy review every six or twelve months: refresh the assessment, re-test the position against the four tests, and score objectives from records.
5. Make every agreed adjustment a new dated version of the plan, with a few lines recording the evidence and reasoning. File versions together; never overwrite.

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6. At the annual review, close the cycle formally: honour finished moves, retire or re-scope unfinished ones with reasons, and build the next period's objectives and moves from the refreshed assessment.

7. Keep a short strategy log — one line per significant outside change noticed during the year — so the next assessment starts from a year's worth of observed reality, not from memory.

A Worked Example

Henrik runs a small brewery supplying local pubs and a taproom, positioned for pubs that want reliable, distinctive local ales with dependable delivery — unlike national suppliers whose deliveries his customers' comments described as erratic. His early warning indicators are delivery reliability (his own record), repeat orders from his ten core pubs, and the hours he personally spends driving, which his assessment flagged as his growth ceiling. Eight months into the plan, the monthly check shows repeat orders softening at two pubs for the second month running. Investigation, not panic, follows. The facts: a national supplier is offering those pubs a sharp temporary discount, and one pub's own footfall is down with roadworks outside it. The cause is market pressure plus a local accident — not position failure, since the other eight pubs' repeats and delivery praise remain strong, and the two affected landlords both say they intend to return when the discount ends and the road reopens. The adjustment is measured and written as plan version three: a loyalty arrangement for core pubs that rewards steady ordering without matching the unsustainable discount price-for-price, and a temporary delivery-day change that helps the roadworks pub keep its cellar stocked. Henrik explicitly records what he is not doing: not cutting list prices across the board, and not reopening the position, with the evidence for both non-decisions stated. At the annual review, the discount has ended, both pubs have returned, and Henrik's version trail shows a year of small, evidenced adjustments rather than one panicked price war that would have reset his margins for every customer he had. His strategy did not survive by being rigid. It survived by knowing which parts of a bad month were weather, and which would have been climate.

Common Mistakes

- **Confusing a bad month with a bad strategy.** Early difficulty is usually execution or weather. Demand strong, repeated evidence before reopening the position itself.
- **Lurching at competitor noise.** A rival's announcement is a log entry and a question, not a new strategy. Investigate its real effect on your customers first.
- **Adjusting without writing it down.** Unwritten adjustments fork the plan into as many versions as there are memories. One dated version, with reasons, or it did not happen.
- **No early warning indicators.** By the time revenue falls, the causes are months old. Name the figures that move first, and watch them monthly.

Try It

Build your first working strategy over two focused weeks, using the five lessons in order. Week one, days one and two: complete the honest assessment — offers by real figures, strengths with

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proof, weaknesses with costs, real customers, real alternatives, and the four lists with every threat-meets-weakness junction circled. Days three and four: draft your position in the "For… who need… we provide… unlike… because…" shape, run the four tests in writing, write the shadow of what you will de-prioritise, and reduce it to two or three sentences your team can repeat. Day five: draft your two to four objectives with measures, starting points, targets, and dates, and your candidate moves list. Week two, days one and two: run the two-way check between objectives and moves, keep two or three moves, cost them in money and hours, and sequence them with your reasoning paragraph. Days three and four: convert the moves into quarterly stages and the next quarter into owned, dated monthly actions; budget fully, lay the budget against your monthly money pattern, and adjust scope or dates in writing where they collide. Day five: write the plain plan document, book the year's monthly checks and the deep review date, name each objective's early warning indicator, and announce the strategy to everyone affected — position, moves, shadow, and reasons.

Then live by the rhythm: monthly checks on stages and indicators, investigation before adjustment, every adjustment a dated version with its evidence, and an annual review that refreshes the assessment and begins the cycle again, faster and truer than the year before. Judge your strategy after a year not by whether the world obeyed it — the world will not — but by whether your effort pointed somewhere chosen, your few moves mostly finished, and your adjustments were made from evidence in writing rather than from drift or panic. That is a business being steered. That is acing your strategy.

Fortress shares what I learned, not professional advice. General info only, not legal / HR / financial advice.

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