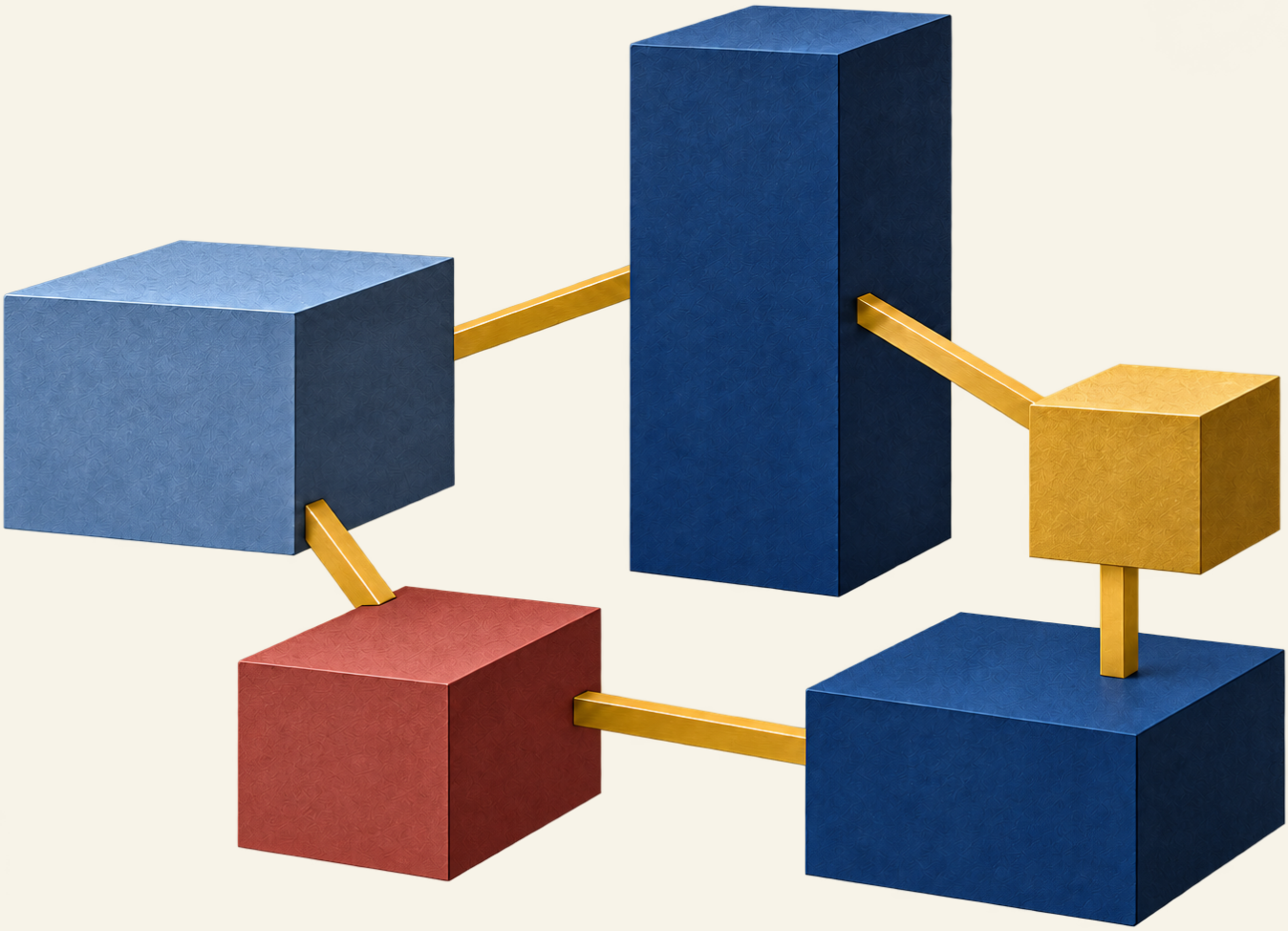
MASTERING STRATEGY
MAKING STRATEGY A TEAM SPORT

Create more value from your portfolio – without taking away the autonomy that helps each business succeed

PORTFOLIO

A Strategic Alignment Sprint for Related Companies Under Common Ownership



Creating greater value across the portfolio

As a portfolio of businesses grows, decisions about capital, talent, shared capabilities and emerging risks can benefit from a broader perspective. The opportunity is to identify where coordinated action will add value, clarify which decisions belong with each business and which require joint agreement or direction from the holding company, and preserve the autonomy that enables each business to succeed.

PORTFOLIO creates a disciplined way to decide where collective action will improve results and where independence will protect them. It's not a search for forced synergies. It's a practical strategy for strengthening the long-term performance of the businesses, both individually and together.

PORTFOLIO is for organizations that are:

Managing related businesses The companies operate in the same industry or ecosystem and do not directly compete.	**Seeking clearer decision criteria** Leaders want clearer criteria for allocating capital, talent and attention across the portfolio.
Clarifying the holding company's role Leaders need clearer boundaries between company and holding-company decisions.	**Facing shared opportunities or risks** Some opportunities and risks affect more than one business and are best considered across the portfolio.

What your portfolio-leadership group will accomplish

01 Define how the portfolio adds value

Agree why these businesses belong together and what common ownership will make possible.

02 Decide where to collaborate

Identify the opportunities and risks best addressed through collective action.

03 Clarify decision rights

Distinguish company decisions from matters requiring collaboration or holding-company direction.

04 Commit to action

Set priorities, assign owners, establish measures and milestones, and schedule reviews for the next 90 days.

How the sprint works

PORTFOLIO is designed for a portfolio-leadership team rather than an intact operating team: the CEO and, optionally, one senior leader from each business, plus representatives from the holding company and ownership, for a maximum of 15 participants.

Focused preparation and virtual facilitation enable the group to make clear decisions for the portfolio while preserving each business's autonomy. *Four virtual half-day sessions over four to six weeks. In-person facilitation may be considered by arrangement.*

BEFORE THE SPRINT Prepare	Clarify decision-making authority, identify non-negotiables and establish where common ownership could add value while preserving company autonomy.
SESSION 1 • HALF DAY Confirm mandate	Participants clarify what is and is not open for discussion, identify any non-negotiables, confirm the decisions the full group is authorized to make, and develop an initial view of opportunities and constraints.
SESSION 2 • HALF DAY Explore opportunities	Establish a shared ambition and assess where common ownership could add value, considering opportunities, benefits, risks and implications for each company.
SESSION 3 • HALF DAY Make choices and clarify responsibilities	Select three to five portfolio priorities and clarify which decisions belong with individual companies, require joint agreement or rest with the portfolio leader.
BETWEEN SESSIONS Consolidate decisions	Company participants validate assumptions with their leadership teams. The facilitator drafts the Portfolio Strategy for input from the businesses and solicits feedback.
SESSION 4 • HALF DAY Confirm & commit	Review and finalize the Portfolio Strategy, confirm decision responsibilities and translate agreed priorities into a focused 90-day Portfolio Action Plan. Establish how progress will be reviewed.

60 days after completion

A 60-90 minute virtual review assesses progress on the 90-day plan, helps resolve obstacles, draws out lessons learned and adjusts priorities, responsibilities or milestones as needed.

Two practical tools for your team:

01 Portfolio Strategy

An agreed strategy defining how common ownership will add value, with a shared ambition, clear priorities and key opportunities and risks. It includes a **Decision and Opportunity Map** identifying what companies will pursue independently, where they will work together and which decisions or initiatives require holding-company involvement.

02 Focused 90-Day Portfolio Action Plan

A practical plan setting out immediate priorities, actions, named responsibilities, contributions expected from each business, key dependencies, milestones and measures of progress. It establishes review dates to assess results, resolve obstacles and adjust course as needed.

What makes PORTFOLIO work

- **The right leaders participate.** Company CEOs and senior leaders work alongside those responsible for the portfolio.
- **Real business opportunities guide the discussion.** Participants examine where collaboration could improve results and where independence remains important.
- **Company teams help test the thinking.** Between sessions, participants consult their colleagues to check assumptions and practical implications.
- **Commitments have clear ownership.** Leaders agree who will act, what each business will contribute and when progress will be reviewed.

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Could common ownership be creating more value?

Start a conversation with Chris Ward, Creator and Program Director, about how PORTFOLIO could help your businesses achieve more by working together.

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