Minimum Viable Mobilisation:
10 Keys to Successful Strategic Initiative Startup

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Minimum Viable Mobilisation (MVM) applies ideas from agile, lean startup and design thinking to the initiation and planning of strategic initiatives such as transformation and growth programs. This article identifies the 10 keys to MVM to set up a strategic initiative for success.

"If your strategic change initiative is not set up for success, you are set up to fail."

When everyone is excited about a new initiative, whether it's to enter a new market, develop an innovative product, transform the way you provide service, or drive organisational improvement, it is tempting to jump into implementation or 'doing' mode.

However, starting fast does not mean an initiative will finish well (or fast). There is a stage that sits between having an idea and starting implementation - a stage that often sets the course for the ultimate success or failure of a strategic initiative. Yet it is rarely done well and there's not even a common name for this stage: people call it initiation, feasibility or planning. For my part, I prefer the term mobilisation, because it involves all of these activities, and more.

Immediate and frantic activity without the right mobilisation activities such as planning, visioning, and alignment of stakeholders means the initiative is built on weak foundations. Hemant Kogekar's article in *CIO magazine*, 'Why IT Projects Really Fail' [http://www.cio.com.au/article/533532/why_it_projects_really_fail/], identifies the most common reasons for project failure as being: fuzzy goals, over-optimism, weak ownership, complexity, poor (including excessive) governance and 'over-engineered thinking' (excessive documentation in place of problem-solving). Most of these problems apply not just to IT projects, and can often be traced right back to how the initiative was set up.

Based on my experience with over 40 strategic initiatives and new ventures in their startup stage, I have observed that there are 10 keys that make up *Minimum Viable Mobilisation* (MVM). These are the really important things that help set up a strategic initiative for success. But they must also be kept minimal in order to move quickly to execution, thereby facilitating iteration based on feedback and learning. Rapid experimentation and learning are the core ideas behind design thinking, agile, and lean startup.

The 10 keys to Minimum Viable Mobilisation for a strategic initiative are outlined below, grouped simply and logically based on the questions that they help answer, namely:

1. What are you trying to achieve, and why?
2. Who do you need on board?
3. How will you deliver?

1. What are you trying to achieve, and why?

(i) What is your clear and compelling case for change?

The first job is to define what you are trying to achieve: what needs to change – the new product, channel, market, way of doing things. Sometimes called a ‘burning platform’, the case for change is built on the pain associated with the current situation. It stands to reason that the worse the current pain (read ‘inconvenience’, ‘high cost’, ‘inefficiency’, etc.), the more people (eg, your customers, staff, or leadership team) are motivated to change. During the startup phase of a strategic initiative, hard data and human stories need to be gathered in order to help leaders articulate the reason for change in a clear and compelling manner.

(ii) What are the costs and benefits of the venture?

Costs and benefits may be financial or non-financial, and non-financial benefits may be tangible or intangible. It is essential to have a clear view of all of these, whether the strategic initiative is approved on the basis of financial benefits or not. For some ventures, for example if the strategic initiative is of sufficient size to be a potential cash drain, it may be important to understand the cash burn rate as well.

2. Who do you need on board?

(i) Who is the accountable owner?

This needs to be the person who will benefit most from the results of the strategic initiative, and typically is the funder of the initiative. By definition, most strategic initiatives will need to be owned by the CEO or the head of a business unit or division. If the appropriate owner is too busy to play the role of the leader driving the change, then perhaps the organisation is attempting to do too much. The accountable executive is the person who needs to speak for the initiative to various stakeholders, and is the arbiter when conflicts arise (typically over resources). Without a clear accountable owner, initiatives flounder from insufficient funding/resourcing, unclear vision, and lack of stakeholder alignment, which feeds confusion and resistance.

(ii) Have we built a critical mass of key supporters?

Besides the owner, a number of people are needed to form a ‘guiding coalition’, a term popularised by John Kotter in a seminal article ‘Leading Change: Why Transformation Efforts Fail’ [https://hbr.org/2007/01/leading-change-why-transformation-efforts-fail]. Most strategic initiatives will need the efforts of multiple functions and divisions, and even multiple organisations. Without someone in each function, division/business unit and organisation who exercises leadership and influence, it is difficult to rally efforts across these organisational boundaries. Sometimes it is also important to gain the support of people higher-up or lower-down in the hierarchy, or external parties such as regulators and unions. Although it is often not possible or necessary to gain the support of every single stakeholder (or stakeholder group) from the start, there needs to be a critical mass of support, and sufficient understanding of who all the key stakeholders (or stakeholder groups) are.

(iii) Do we have the right team to deliver?

It goes without saying that the success of any strategic initiative is down to the team that's there to deliver, especially its leader. Driving change is never easy, and the quality and resilience of the team is critical to success. Especially in the early days, quality matters far more than quantity, so hire fewer but more versatile and experienced people, rather than try to build out a full team before your idea is fully developed and funded.

3. How will you deliver?

(i) Have we developed a clear roadmap, and is there appropriate planning to support it?

General Dwight Eisenhower said that "plans are nothing, but planning is everything". Without a plan of activities and a roadmap towards achieving your objectives, there is no focus. However, overly detailed planning can be counterproductive as it is impossible to predict all the factors that would affect the strategic initiative at the outset. What's useful is to identify the key activities, deliverables or capabilities required, and understand how they are linked. This is what keeps the plan 'minimally viable'. If, in contrast, you just start writing out a laundry list of what needs to be done, then you will get... a laundry list.

(ii) Do we have a realistic idea of risks?

This is an often underrated step, as it is during the mobilisation stage that you are usually best positioned to address those factors that make an initiative complex or 'inherently risky'. Depending on the organisational context, these inherent risks may include, for example, the need to use unproven technology, long duration, unsettled scope, multiple regulators, or significant customer impact. Because of their nature, you will probably never fully eliminate these types of risks. However, you can be purposeful in your planning and shaping of the strategic initiative to reduce their impact on your initiative and organisation.

(iii) Have we thought about how we will drive behaviour change?

A strategic initiative always involves change on the part of your own organisation or that of your customers. This does not happen automatically. A minimum viable mobilisation requires you to identify the various groups that you need to influence, and define strategies to do this. Think of the different groups as different market segments, and you may well find that you need different strategies for different groups. You may also find that certain groups are natural early adopters while others might have reasons to dislike the change, and a MVM strategy would focus on these two groups. Once you've identified your target groups, study them. Contextual, empathy-driven research is common in design thinking, and this saves you time and effort in the long run in designing a robust strategy and/or initiative, thereby adhering to the philosophy of MVM.

(iv) Are we appropriately funded?

It is a fine balance between having sufficient funding and too much. A good indicator is when there is enough funding so that you can afford to hire a few good quality people and there is momentum, but not too much funding that you can afford wastage such as the excessive bureaucracy and documentation referred to previously. The art is to find the right amount of funding pressure that you are forced to think creatively about how to make things happen quickly.

(v) How will we know whether we are on track for success?

Once you start execution, you need to know whether you need to iterate, or pivot from the original concept of the strategic initiative. To know whether you are on track, you need to identify the relevant qualitative and quantitative indicators. Relevant indicators obviously depend very much on the specific initiative. A starting point is to ask: 'what does success look like' and 'how will I know we are headed towards success'? This may include the benefits that you identified. Say that's improved customer service. Will you look at net promoter score, customer satisfaction surveys? Keep in mind that it's often more important to look at whether the indicators are trending in the right direction, rather than reaching an absolute number per se. To keep things minimally viable, 3-5 indicators would be ideal.

1. *What are you trying to achieve, and why?*
   - (i) What is your clear and compelling case for change?
   - (ii) What are the costs and benefits of the venture?

2. *Who do you need on board?*
   - (i) Who is the accountable owner?
   - (ii) Have we built a critical mass of key supporters?
   - (iii) Do we have the right team to deliver?

3. How will you deliver?
   - (i) Have we developed a clear roadmap, and is there appropriate planning to support it?
   - (ii) Do we have a realistic idea of risks?
   - (iii) Have we thought about how we will drive behaviour change?
   - (iv) Are we appropriately funded?
   - (v) How will we know whether we are on track for success?

Figure 1. The 10 Keys to Minimum Viable Mobilisation

Having outlined the 10 keys, it must be remembered that while all of the elements should be in place, we are not aiming for perfection. Far better to revisit these elements after the initiative is fully up and running, rather than overanalysing to the point of 'paralysis by analysis'. When your strategic initiative has all 10 elements in place, it means that everyone is clear on what it is trying to achieve, and why it is being commissioned. It has the buy-in and involvement of key people, and an idea of how and when it will deliver on its objectives. By taking a focused, outcomes-based approach, you can achieve minimum viable mobilisation, and set up your strategic initiative to succeed.

Stephanie Owen is the principal and managing director of Strategy2Life, a management consultancy that helps leaders drive change and bring strategies to life. Based in Sydney, Australia, she has worked in and advised on the initiation, planning or feasibility stage of more than 40 strategic initiatives and startup new ventures in Australia, US, UK and New Zealand – including growth, transformation, compliance initiatives and new ventures.