


# Checklist: How your business can shift to an Enterprise Strategy and Planning model

Shifting to an Enterprise Strategy and Planning (ESP) approach isn't about adopting yet another new framework, it's about evolving how strategy is executed. Think of ESP as assembling a cube, where each facet supports the others, creating a dynamic and adaptable strategy framework.

At its core, ESP is built on six interconnected facets:

1. **Goals** – Measurable outcomes that define success for an area
2. **Work** – Everything from big packets that span quarters down to individual tasks
3. **Talent** – People: your largest asset (and cost)
4. **Funds** – Budget and actual costs, ideally a combo of CapEx and OpEx
5. **Systems** – Systems and services that you need to create or update to support strategy
6. **Updates** – Human-written, qualitative updates on progress (e.g. status reports)



Take a deeper look at how ESP can future-proof your business with [Atlassian's Approach to Enterprise Strategy and Planning](#).



## Checklist: Questions for leaders

Even with all the frameworks available to you, can you answer the following questions with a high degree of confidence or detail?

- ☐ Can you articulate your biggest strategic priorities?
- ☐ Are all six facets aligned to deliver against those priorities?
- ☐ Can you easily explain how you are tracking your timeline against your priorities and how those priorities are changing?
- ☐ Do you have contingencies for an array of potential issues and could you hypothesize the impact that would have on your business?
- ☐ Does your strategic planning allow your teams to work in their own optimized ways with full visibility into work across the organization?
- ☐ Are you driving results with your current initiatives and talent?
- ☐ Can you tie your metrics back to your outcomes through key results?

- ❑ Are you able to show with metrics that delivering ROI is a crucial part of your strategic priority?
- ❑ Is the data you're operating with credible enough to back your next move?
- ❑ Do you have a comprehensive way of viewing goals, work, talent, investments, systems, and updates at once with an interlocking narrative?
- ❑ Can you articulate what processes and tools are – and aren't – working for your teams?
- ❑ Can you plan your positions and headcount directly against your strategy?
- ❑ Have you implemented alarms to urgently notify you of off-balance organizational ratios, slow hiring, or delivery slips?
- ❑ Does your talent actually align with your strategic priorities?



## All in on Enterprise Strategy and Planning

Adopting ESP requires a mindset shift to connect all six facets with your biggest priorities. Use this checklist to assess your current approach, make adjustments over time, and strengthen your execution.

### Modeling Strategic Focus Areas

As your leadership team enters a strategy refresh or planning cycle, [run this Play](#) to build and align on your organization's strategic focus areas.



PREP TIME

**1-2 weeks**



RUN TIME

**90-180 mins**



PERSONS

**4-10**



## Strategy Collection

**Turn strategy into remarkable outcomes**

Evolve your enterprise strategy and planning with a collection of apps that help you deliver better outcomes across your business. Learn more about the [Atlassian Strategy Collection](#) here.