

Strategy Is a Decision. Deployment Is a Discipline.

The OGSMI: one page that sets, aligns, and deploys strategy.

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Strategy is a decision. Deployment is a discipline.

The OGSMI is one page that sets, communicates, aligns, and deploys strategy.

Rooted in Hoshin Kanri strategy deployment, the same page serves the sponsor, the CEO, and the teams doing the work.

O**OBJECTIVES**

Words. The “what.” Direction for the next 3-5 years - the playing field and rules for winning.

G**GOALS**

Numbers. What success looks like over the horizon - strategic, financial, operational.

S**STRATEGIES**

Words. The “how.” Specific choices, implemented through initiatives.

M**MEASURES**

Numbers. Progress against each strategy - is it working?

I**INITIATIVES**

The most leveraged set of activities to move each strategy - where the organization acts.

IN THIS GUIDE

- The corporate page - a full working example
- The architecture - how one page cascades through the organization
- The mechanics - how a single strategy is promoted
- The functional page - the same discipline, one level down

A full corporate page.

Embedded insurance platform | ~\$180M gross premiums | sponsor-backed | illustrative

OBJECTIVE

Become the default coverage layer for mid-market commerce - the embedded insurance platform partners build on wherever their customers transact.

GOALS | 2027 TO 2032

- 1** Gross premiums \$180M to \$450M
- 2** EBITDA \$22M to \$60M
- 3** Live partner programs 45 to 150+
- 4** Blended attachment 7% to 12%

STRATEGY 1

Scale partner distribution - win, launch, and expand partnerships in three priority verticals.

MEASURES

- New partnerships signed / qtr
- Median time-to-launch (days)
- Premiums from partners live <12 mo
- Qualified pipeline coverage ratio

INITIATIVES

- Vertical GTM playbooks (3 verticals)
- Named-account model w/ partner tiering
- Two platform / ISV channel alliances
- Partner referral program pilot

STRATEGY 2

Deepen attachment economics - convert more of every partner's flow at better unit economics.

MEASURES

- Attachment rate by vertical
- Quote-to-bind conversion
- Net revenue per transaction
- Test velocity (experiments / qtr)

INITIATIVES

- POS redesign + structured testing
- Dynamic pricing engine, gen 2
- Fast-track claims experience
- Coverage bundling pilots, two verticals

STRATEGY 3

Build capacity advantage - durable, diversified underwriting capacity at improving economics.

MEASURES

- Blended loss ratio
- Program-level contribution margin
- Capacity utilization
- Active capacity relationships

INITIATIVES

- Add two reinsurance capacity partners
- Underwriting data platform build
- Loss-control analytics program
- Renegotiate top-3 carrier agreements

STRATEGY 4

Institutionalize the platform - scale-ready onboarding, service, and compliance.

MEASURES

- Partner onboarding cycle time
- Partner retention rate
- Cost per policy serviced
- Open regulatory findings

INITIATIVES

- Self-serve partner onboarding portal
- Policy administration consolidation
- State-by-state compliance expansion
- Tiered partner service model

Discipline caps: 3-5 goals | 3-4 strategies | ≤5 measures | 3-5 initiatives per strategy

The cascade, from altitude.

Every corporate strategy becomes a function's objective. Direction narrows as it approaches the work.



RULES OF THE CASCADE

- 1 Promotion, not repetition.**
Each function writes its own page under inherited direction - it does not restate the corporate page.
- 2 Selectivity above, execution below.**
Fewer, clearer choices at the corporate level produce tighter execution beneath it.
- 3 The pages come back for review.**
Functional pages return to the quarterly business review - the cascade is a live system, not a filing exercise.

THE TEST

Does the page set guardrails that align direction as it moves down the organization?

One strategy becomes one team's entire agenda.

The cascade is not a communication exercise. A corporate strategy is promoted into the function's objective.

CORPORATE

Objective

Goals | 2027 to 2032

Strategy 1 | measures | initiatives

Strategy 2 | measures | initiatives

Strategy 3 | measures | initiatives

Strategy 4 | measures | initiatives

- 1 One strategy becomes one team's entire agenda.
- 2 Measures become goals - the corporate strategy's measures are promoted into the function's targets.
- 3 Five-year direction becomes one-year targets - the horizon compresses as work gets closer.

SALES & PARTNERSHIPS

Objective ← Corporate Strategy 1

Goals | FY2027

Strategy 1 | measures | initiatives

Strategy 2 | measures | initiatives

Strategy 3 | measures | initiatives

Strategy 4 | measures | initiatives

Each level answers the level above it - and narrows.

The same discipline, one level down.

The functional page beneath Corporate Strategy 1 | illustrative

OBJECTIVE | PROMOTED FROM CORPORATE STRATEGY 1

Scale partner distribution - win, launch, and expand platform partnerships in e-commerce, travel, and auto retail.

GOALS | FY2027

- 1** 24 new partner programs signed
- 2** Time-to-launch <60 days (median)
- 3** \$38M premiums, partners live <12 mo
- 4** 3.5x pipeline coverage / qtr

STRATEGY 1

Build the demand engine - generate qualified partner pipeline.

MEASURES

- Qualified opps created per vertical
- Alliance-sourced pipeline share
- Cost per qualified opportunity

INITIATIVES

- Two platform / ISV alliances (corporate)
- Vertical content & event program
- Partner marketing + nurture engine
- Outbound vs. top-20 target lists

STRATEGY 2

Win the priority verticals - convert pipeline into flagship partnerships.

MEASURES

- Win rate vs. named-account list
- Average program size at signing
- Sales cycle length

INITIATIVES

- Deploy the three vertical playbooks
- Flagship reference program per vertical
- Program-structuring deal desk
- Competitive positioning kit per vertical

STRATEGY 3

Launch fast, prove value early - compress signed-to-live.

MEASURES

- Signed-to-live cycle time
- % hitting 30-day premium plan
- Partner NPS at day 90

INITIATIVES

- Launch pod with implementation
- Pre-built kits for top platforms
- 90-day success plan as standard
- Post-launch retro loop to kits

STRATEGY 4

Expand what's live - placement expansion, new geographies, referrals.

MEASURES

- Net premium expansion, existing partners
- Placements per partner
- Referrals sourced from live partners

INITIATIVES

- QBR program, top-20 partners
- Expansion to 2nd & 3rd surfaces
- Referral program launch (from pilot)
- Expansion incentive framework

The same discipline, one level down. That is what deployment looks like.