

Strategy Brief

[Initiative]



Prepared for: [Stakeholder, Title]
Prepared by: Project Lavos LLC
Date: [Month DD, YYYY]
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1 Situation

[Open with the current state in two or three paragraphs. Establish the landscape factually – where the organization sits today, what has changed in the market or environment, and the pressure that makes a decision necessary now. Anchor to evidence the reader already trusts: their own numbers, named competitors, observable trends. This section earns the right to recommend by proving the situation is understood.]

The core tension. [State the single defining problem in one sentence – the gap between where the organization is and where it needs to be. Quantify it: e.g. “[market share has eroded from [22%] to [16%] over [six] quarters while the category grew [11%]].” This is the sentence the entire brief exists to resolve.]

[Close the situation with the cost of inaction. What happens if nothing changes? Make the stakes concrete and time-bound so the objective that follows reads as a response, not an ambition.]

2 Objective

[State the objective as a single measurable outcome, not a list of activities. The objective answers “what does winning look like, and how will we know?” Keep it to one paragraph and one number.]

By the end of the horizon, we will:

- Achieve [+18%] [primary outcome, e.g. recurring revenue], measured in [system / source of truth].
- Reach [\$X.XM] [secondary target], up from [baseline].
- Establish [1] [durable capability that outlasts the initiative, e.g. an owned acquisition channel].

[One sentence naming the constraint the objective respects – budget, headcount, timeline, or risk tolerance – so the strategy that follows is visibly feasible, not aspirational.]

3 Strategy

[Describe the approach – the logic that connects the situation to the objective. The strategy is the “how we will win,” stated before the tactics. Two or three paragraphs explaining the central bet: where the organization will concentrate force, what it will deliberately not do, and why this path beats the obvious alternatives.]

3.1 The central bet

[Name the one decision that defines the strategy. Strategy is choice; this subsection makes the choice explicit. e.g. “[We will compete on [integration depth] rather than [price], because [the data shows switching cost, not cost, drives retention in this segment].”]

3.2 Where we will not play

[State what the strategy excludes. A strategy that tries to do everything is a plan, not a strategy. Naming the trade-offs is what makes it credible – e.g. “[we will not pursue [the SMB tier] this horizon; it dilutes focus and the unit economics do not clear our threshold].”]

4 Initiatives

The strategy resolves into [three] initiatives. Each is independently ownable, independently measurable, and sequenced in the roadmap that follows.

Initiative 1 – [Name]

[One-line intent: the outcome this initiative produces.]

- **Owner:** [Name / function]
- **Key actions:** [the two or three moves that matter most]
- **Success metric:** [target] by [milestone date]

Initiative 2 – [Name]

[One-line intent: the outcome this initiative produces.]

- **Owner:** [Name / function]
- **Key actions:** [the two or three moves that matter most]
- **Success metric:** [target] by [milestone date]

Initiative 3 – [Name]

[One-line intent: the outcome this initiative produces.]

- **Owner:** [Name / function]
- **Key actions:** [the two or three moves that matter most]
- **Success metric:** [target] by [milestone date]

5 Roadmap

The initiatives sequence across [four] phases. Each phase has a single gate – a result that must hold before the next phase begins – so the plan fails cheaply if the thesis is wrong.

Phase 1 – Foundation | [baseline, instrumentation, quick wins]

Phase 2 – Build | [Initiative 1 & 2 to first milestone]

Phase 3 – Scale | [Initiative 3, expand what works]

Phase 4 – Compound

[Note the gate for each phase explicitly – e.g. “[Phase 2 begins only once Phase 1 confirms [the leading indicator] clears [threshold]].” State the assumed cadence of review so the roadmap is honest about how progress is checked.]

6 Risks & Mitigations

The strategy's main exposures, rated by likelihood, each paired with a mitigation owned before the risk materializes.

Risk	Likelihood	Mitigation
[Key dependency slips, e.g. vendor / hiring delay]	[Medium]	[Pre-stage the alternative; gate Phase 2 on the dependency clearing]
[Leading indicator fails to clear the Phase 1 gate]	[Low]	[Kill criterion defined up front; redeploy budget to Initiative 2]
[Competitor responds faster than modeled]	[Medium]	[Hold a contingency reserve; compete on the moat, not on price]
[Internal capacity is overcommitted across initiatives]	[High]	[Sequence, do not parallelize; one named owner per initiative]

7 Recommendation

[State the recommendation in one decisive sentence: approve the strategy, fund the first phase, and commit to the gate. Avoid hedging – the brief has earned a clear ask by this point.]

Recommendation. Proceed with the [three-initiative] strategy, funding **Phase 1** at \$[XXX,XXX] now. Phase 1 is deliberately scoped to prove [the central bet] within [N weeks] before larger commitment – so the downside is capped at the Phase 1 budget while the upside is the full [+18%] objective. The decision required today is the Phase 1 go, not the whole horizon.

[Close with the single next action and its date – e.g. “[Approve Phase 1 funding by [Month DD] to hold the Q3 start and keep the horizon intact].” End on the stakes, not the logistics.]