



GLOBAL STRATEGY EXECUTION SUMMIT

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Strategy Planning & Execution for Small and Mid Size Organizations

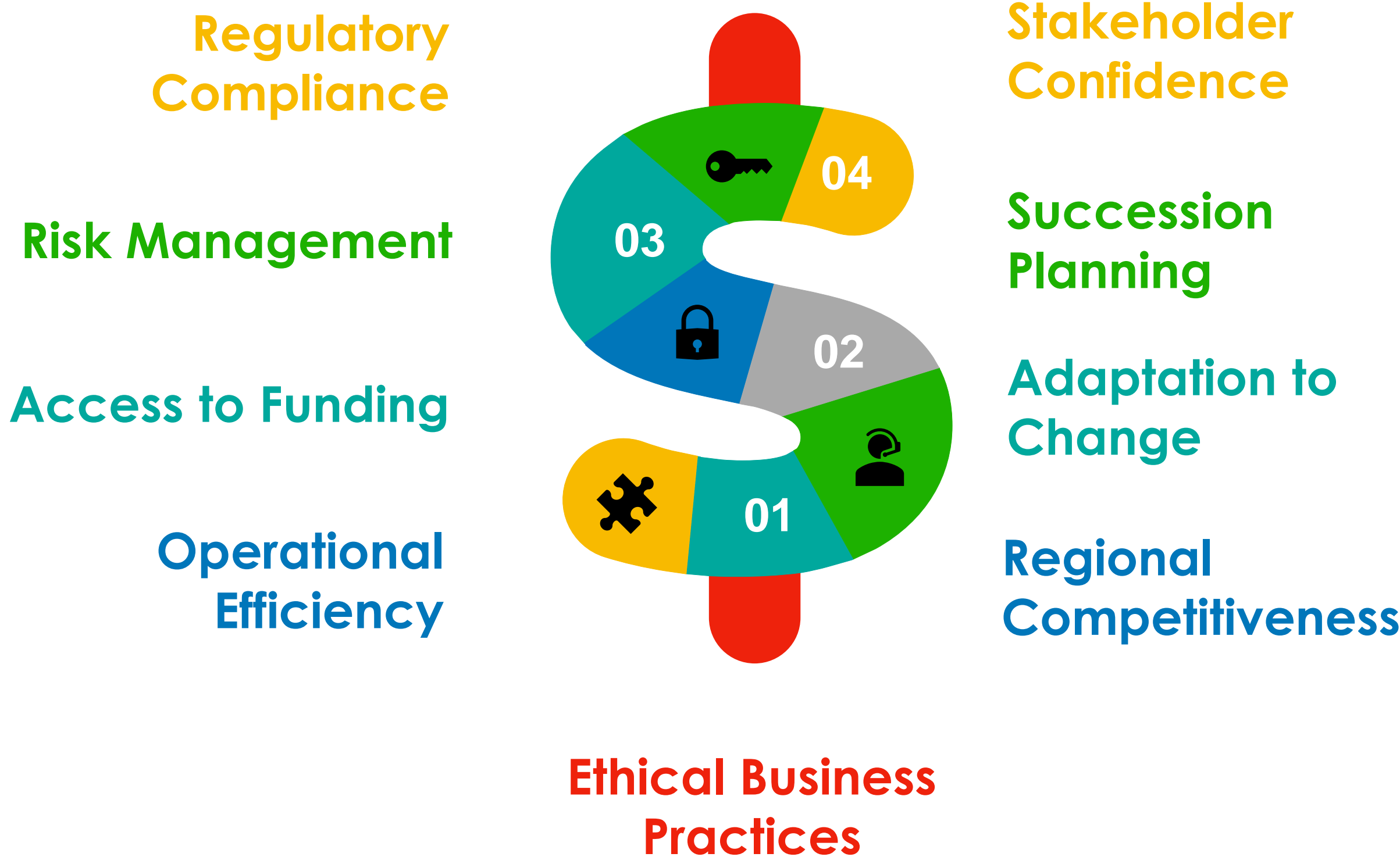


What are Small & Mid Size Organizations?

Refer to businesses that fall within a certain range of size, typically measured by factors such as revenue, number of employees, or other relevant criteria. The specific definitions and criteria for categorizing businesses as small or medium can vary from country to country within any region, as each nation may have its own set of standards.

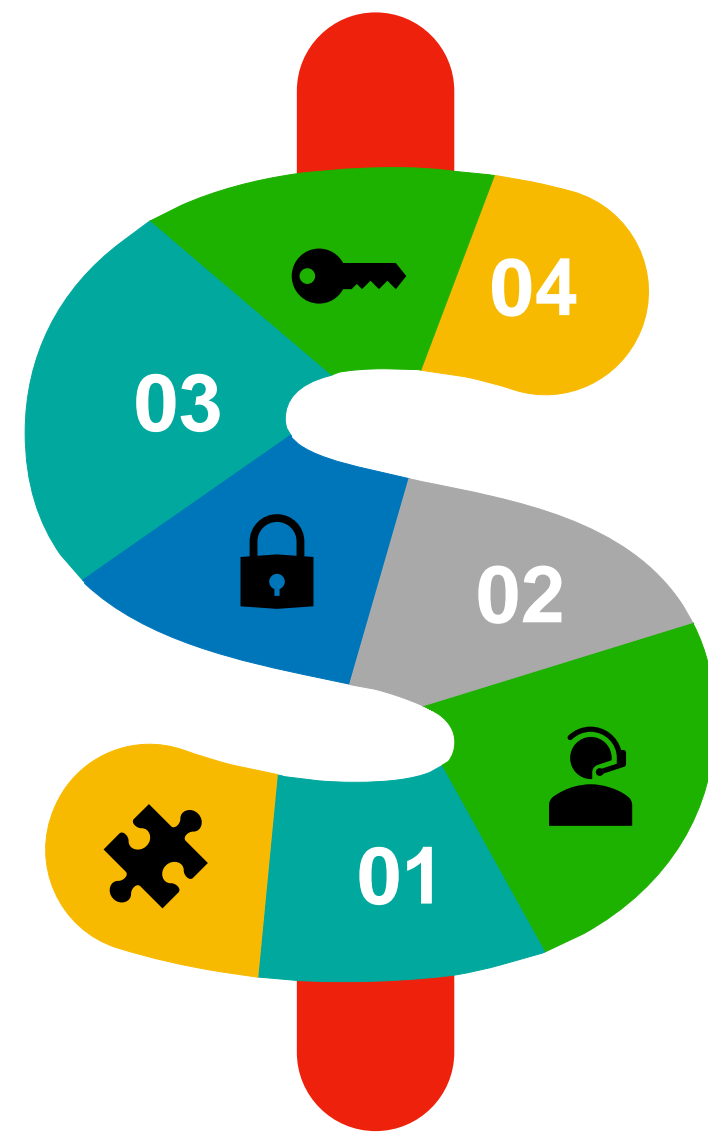


Why is governance so important in Small & Mid Size Organizations?



Why is governance so important in Family Companies?

- Family Dynamics
- Professionalization of Management
- Access to Capital and Investors
- Compliance and Reputation



- Succession Planning
- Adaptation to Changing Business Environment
- Conflict Resolution



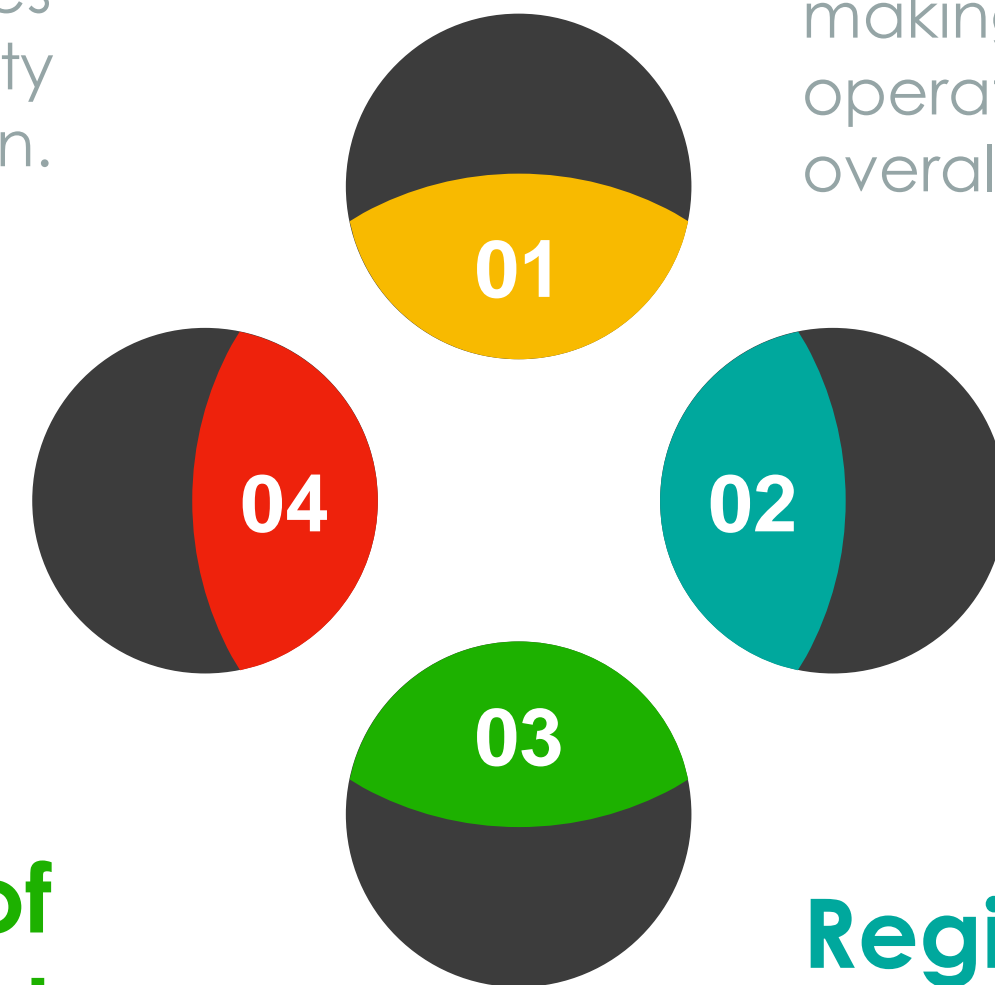
Key Topics

Ethical Business Practices

Strong governance encourages ethical behavior and integrity within the organization.

Operational Efficiency

Clear roles, responsibilities, and decision-making processes streamline business operations, reduce conflicts, and enhance overall organizational performance .



Professionalization of Management

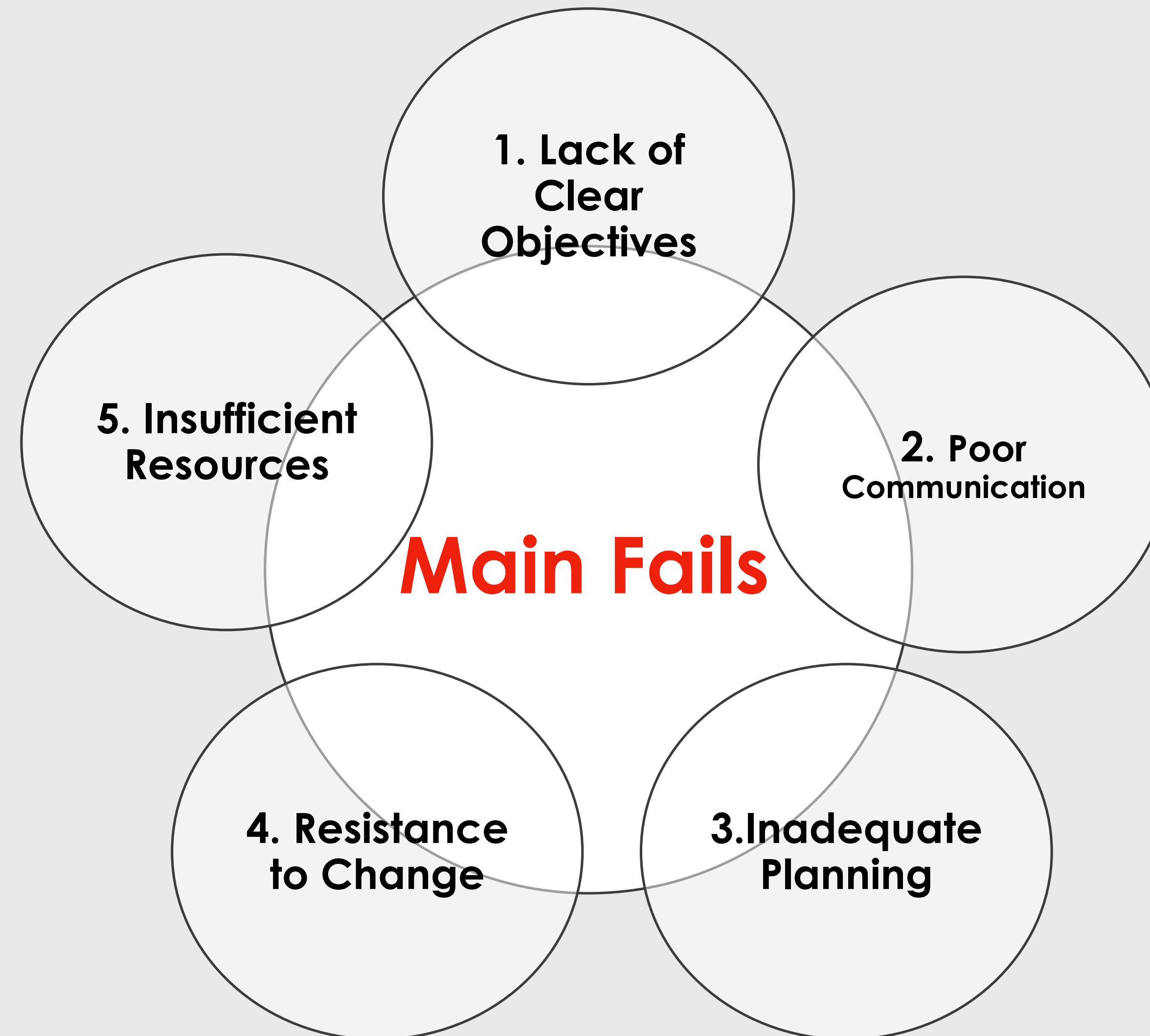
Establishing governance structures encourages the professionalization of management within family businesses.

Regional Competitiveness

This is important for attracting foreign investments, engaging in international trade, and participating in global markets



Why planning and execution fails in Small & Mid Size Organizations? (1/2)



Why planning and execution fails in Small & Mid Size Organizations? (2/2)



Why do business's fail?

The entrepreneurial Myth:

“If you are a specialist in one area of trade, it has nothing to do with creating or developing a business in this area”.

- **When a business is created with this mentality, the entrepreneur or business owner “acquires” the following roles:**

1. General Manager
2. Marketing Manager
3. Sales Manager
4. Financial Manager
5. Operations Manager
6. Human Resource Manager

- **Very few “schools” teach how to develop a business (small or midsize) from zero.**
- **Many entrepreneurs believe they are not accountable for the results of their business (lack of focus)**
- **Many entrepreneurs develop their business's in a way that it can't grow without them being fully involved in the operation**
- **Many entrepreneurs do not develop a focus on an specific market or develop a competitive advantage for their business**

The importance of a planning and execution framework for Small & Mid Size Organizations

Develop a Clear
Strategy Map

Align Objectives with
Business Goals



Strategic Initiatives and
Projects

Cascade Objectives
Throughout the
Organization

Implement
Performance Measures

The importance of a planning and execution framework for Small & Mid Size Organizations

Foster a Culture of Continuous Improvement

Build Cross-Functional Collaboration



Regularly Review and Update the Strategy

Employee Training and Development

Use Technology Wisely



Thank you

