



Max Strategy

RETHINKING HOW WE BUILD BUSINESS STRATEGY — AND DEPLOY IT

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Rethinking How We Build Business Strategy — and Deploy It in the Organization

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1. The problem: strategy that drifts

Most leadership teams know this pattern. A strong two-day offsite produces real alignment, good arguments, and a deck everyone agrees with. Ninety days later, the deck sits in a folder. The initiatives are still "in progress." Nobody can say who owns the third priority. The next offsite starts by asking what happened to the last one.

The problem isn't the thinking. Most offsites do the thinking well. The problem is what happens afterward. At a \$50 million traditional manufacturer, the plan has to compete with the plant floor, the customer escalation, and the quarter-end push. The plant floor wins every time, as it should, unless the strategy lives in the same place as the operating rhythm.

So offsites don't fail in the room. They fail on the way out the door. Decisions leave as slides when they

should leave as commitments: an owner, a measure, a date, and a place to check progress.

2. The rethink: strategy as a deployed operating system, not a deck

We think strategy should work less like a document and more like an operating system. That means three things:

- **It runs.** It has a cadence that keeps going without anyone needing to rally the team.
- **It's installed where work happens.** Every initiative lives in the system of record the business already uses, not in a presentation.
- **It improves itself.** Every cycle feeds what the company learned into the next one.

That third point is what *Recursive Improvement* means. You don't do strategy once a year and hope it holds. It's a loop that gets sharper each time around.

The cadence is simple on purpose:

Half 1 onsite workshop → five monthly KPI reviews → Half 2 onsite workshop → five monthly KPI reviews → repeat.

Two onsites a year set and reset direction. Ten monthly reviews in between keep the plan honest. Each workshop starts from what the reviews actually showed, not from a blank whiteboard.



Figure 1. The Cycle.

3. How Max Strategy closes the loop

Every engagement, from the first workshop to each monthly review, follows one discipline. We call it **6A**:

1. **Ask**: frame the real question the business has to answer.
2. **Acquire**: gather the evidence: operating data, market signals, voice of the customer, voice of the floor.
3. **Analyze**: test the evidence against proven frameworks.
4. **Apply**: turn the conclusions into specific initiatives with owners.
5. **Announce**: tell the organization clearly what is changing and why.
6. **Assess**: measure monthly, learn, and feed the results into the next Ask.

Pre-work: leaders walk in with evidence. The first three steps don't wait for the workshop. Before anyone travels, **Max Strategy** runs **Ask, Acquire, and Analyze** as pre-work. It frames the questions each leader needs to answer, pulls the operating data and the customer and floor signals behind them, and tests that evidence against the Faculty of proven management thinking described below. Each leader gets a short pre-read built on their own numbers. So the workshop doesn't spend its first morning arguing about what's true. It starts from the evidence and spends its time on decisions. The same system then runs the workshop itself: **Max Strategy** is the operating system for the whole engagement, from pre-work through the onsite and every monthly review.



Figure 2. The 6A Loop.

Grounded in a Faculty, not opinion. The analysis draws on a **Faculty** of proven management thinking, curated and maintained through **Max Leadership**, our thought-leader and Faculty platform. Its seven core frameworks include Kurt Lewin's *unfreeze, change, refreeze*. We chose Lewin on purpose. A traditional manufacturer doesn't fail at strategy for lack of ideas. It fails because established habits are hard to move. Lewin gives the leadership team a shared vocabulary for the human side of change.

Digital Workers do the legwork, and people make the decisions. Digital Workers prepare the research, the analysis, and the first drafts, and they cite the Faculty source behind every recommendation. They never make the decision. **A named human approves every decision and owns its accountability.** That isn't a disclaimer. It's how the system is designed. Software can make a leadership team faster and better informed, but it can't hold the responsibility.

Nobody leaves the room without the board. This is the change that matters most. Before a workshop ends, every initiative is entered into the company's system of record as its own project, with:

- a **named owner**
- a **KPI** that will be reviewed monthly

- the **Module Pack** tag that supports it
- a current **status**

When the team walks out, the strategy is already running. The first monthly review doesn't start with "where were we?" It starts with the board.

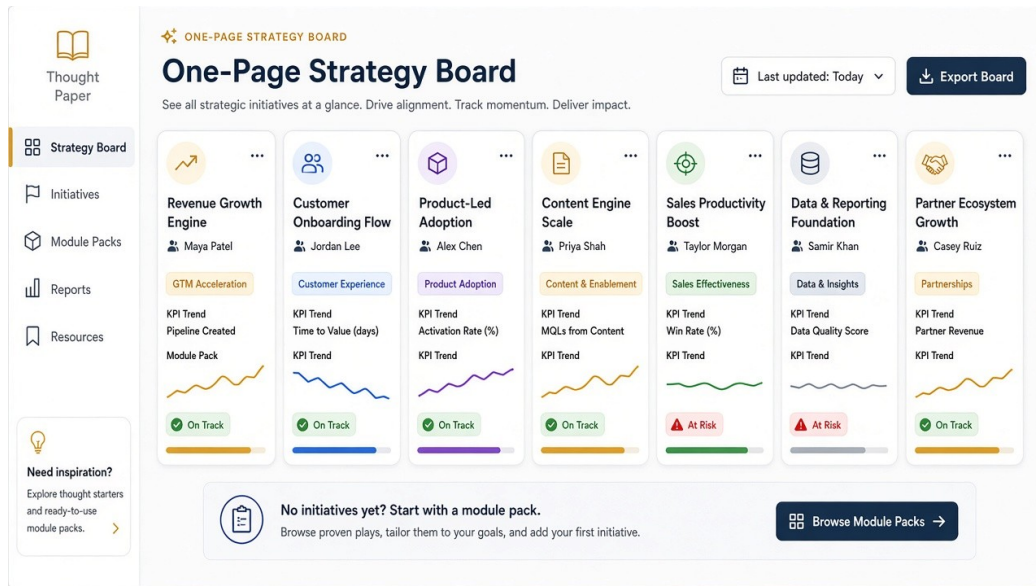


Figure 3. The Initiative Board (one page).

4. Deploying it in the organization

Strategy only sticks if it lives where people already work. So we keep it disciplined with **three lanes** for information:

- **Structured lane — the primary system of record.** Initiatives, owners, KPIs, and status. If it's a commitment, it lives here.
- **Unstructured lane — the decision journal.** Workshop thinking, analysis, narrative, and context. This is where reasoning lives.
- **Media lane — binaries and artifacts, findable through a Media Index.** Recordings, photos, whiteboards, and decks, linked and tagged without cluttering the system of record.

Information moves from the unstructured and media lanes into the system of record only through a short **promote whitelist**. That way the operating record stays clean while the thinking around it stays rich.

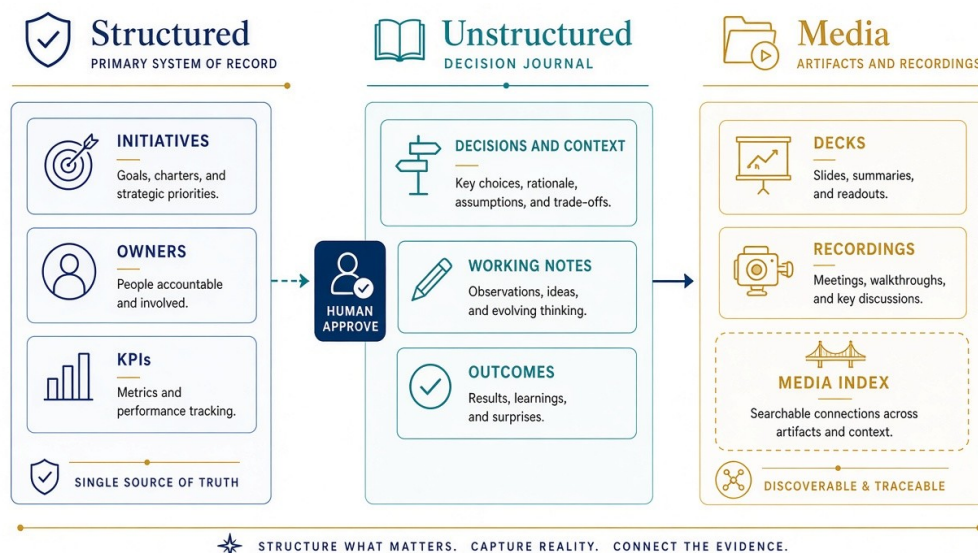


Figure 4. Three Lanes and the Promote Whitelist.

The Module Pack maps strategy to software. Every initiative is tagged to the module that supports it, whether that's pricing, production planning, quality, or service. That turns strategy decisions into a clear map of which tools the organization needs to carry them out.

The full app ships to everyone, and unpurchased modules show in gray. Every client sees the whole platform. Modules they haven't bought appear in gray: visible and understandable, but inactive. When an initiative calls for one of those modules, it comes up naturally on the board. The client sees the gap at the moment it matters, tied to a goal they set themselves. The upgrade conversation is about outcomes, not features.

People own the decisions. This rule holds through every lane, module, and monthly review: the software recommends, prepares, and tracks, and a named leader decides.

5. What we're building next

We're building **Max Strategy** as a Module Pack on **MaxKnowledge**, a Recursive Improvement Platform. The specification is set, and the first phase of development is under way.

We're also using it on ourselves first. **On Saturday, October 31, 2026, Chiles & Company will run its own strategy session on the system**, through the full workshop flow, ending with a live initiative board. We'd rather find the rough edges ourselves than have a client find them.

6. The thesis, and the ask

Strategy isn't an event. It's an operating system. It should run on a set cadence, live in the system of record, draw on proven thinking, improve every cycle, and always have a named person accountable.

Max Strategy is how a leadership team stops redoing its strategy every year and starts building on it.

Our ask is simple. Hold your next leadership offsite to one test: *when people leave the room, is the strategy already running?* If the answer is no, let's talk.

7. The Max family on MaxKnowledge

MaxKnowledge, a Recursive Improvement Platform, ships as a **Module Pack**: the software array. Every client gets the full app. Modules they haven't purchased show in gray: visible, understandable, inactive until an initiative calls for them.

Platform

- **MaxKnowledge**: the Recursive Improvement Platform. It keeps the plant's know-how working inside the systems your team already uses, delivered as a Module Pack array in which unpurchased modules appear in gray.

Products and Module Pack surfaces

- **Max Strategy**: deploys strategy as an operating system, with pre-work, workshops and retreats, monthly KPI reviews, and an initiative board where every initiative has an owner and a KPI (this paper).
- **Max Leadership**: the thought-leader Faculty and Canon, a curated set of frameworks leaders cite when they make decisions.
- **Max Intelligence**: competitive analysis for your company and the markets it serves, showing where you stand against competitors and which gaps to close.
- **Max Configurator**: a LIVE product configurator for complex configured goods, such as doors and hollow metal, so quotes match what the plant can build.
- **Max Lean Six Sigma**: Lean and Six Sigma improvement work (value stream mapping, kaizen, DMAIC) run as a Module Pack, not a binder.
- **Max Learning**: learning and enablement content, so the organization keeps the methods long after the workshop ends.
- **Max Reliability and CMMS**: reliability and maintenance management, covering work orders, assets, and uptime discipline on the plant floor.
- **Max Training and Certification**: structured training and certification paths for people who must prove a skill, not just attend a class.

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Chiles & Company, the process and digital improvement expert for manufacturing and distribution

Got Bots? (gotbots.si): Digital Assistants and the Max family (including **MaxKnowledge™**) that put your company's knowledge to work inside the Microsoft 365 you already use.

Biltmore Management Advisors (biltmoremanagementadvisors.si): operator-led consulting and multi-vendor implementation for middle-market manufacturers and distributors.

MaxKnowledge™, the Recursive Improvement Platform™: keeps your plant's know-how inside the Microsoft 365 your team already uses. Includes **Max Configurator**.

Max Lean Six Sigma, our Lean and Six Sigma platform: a \$200M chemical distributor ran Value Stream Mapping four times faster with it.

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