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THEORETICAL AND PRACTICAL INSIGHTS INTO SELECTING AND ADAPTING STRATEGIC FRAMEWORKS

Introduction. Organizations operating in dynamic industries have been increasingly facing the challenge of selecting and adapting strategic frameworks that align with their operational environments and support sustainable competitive performance.

Problem Statement. The lack of structured approaches to selecting and integrating strategic frameworks frequently results in misalignment between strategic objectives and operational execution, thereby reducing long-term organizational effectiveness.

Purpose. This study aims to examine how the strategy development process can be optimized through an adaptive approach to selecting strategic frameworks that reflect industry-specific characteristics and organizational requirements.

Materials and Methods. The study has employed case studies of Intellias, a global software outsourcing company, by analyzing the strategic approaches adopted by five independent business units. The research has combined comparative analysis, evaluation of strategic frameworks, and assessment of the effectiveness of the implemented strategic models.

Results. The analysis has identified both the strengths and the limitations of different strategic frameworks across the examined business units. The findings have demonstrated that certain frameworks have provided greater adaptability under conditions of rapid environmental change, whereas others have become less effective when their underlying assumptions have not corresponded to the operational structure of the business units. Furthermore, the results have shown that combining complementary strategic tools within a hybrid framework has enhanced strategic coherence, organizational flexibility, and implementation effectiveness.

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Conclusions. *The study has demonstrated that the selection and adaptation of strategic frameworks should be context-driven, taking into account industry dynamics, organizational characteristics, and implementation constraints. The findings have indicated that an iterative approach, incorporating pilot implementation, continuous evaluation, and knowledge sharing across business units, has improved the relevance and effectiveness of strategic frameworks. The proposed adaptive approach has provided practical guidance for organizations seeking to strengthen strategic planning in complex organizational environments and has contributed to the broader understanding of adaptive strategic management.*

Keywords: environmental analysis, strategy implementation, strategic design, strategic options, M-structured organization.

Corporate strategy formulation and execution have become critical determinants of organizational success in today's dynamic and competitive business environment. A report by the World Bank has underscored the economic importance of strategic planning, showing that businesses with clearly defined strategies achieve an average growth rate 20% higher than those operating without structured strategic frameworks [1]. This finding highlights the tangible impact of strategic decision-making on long-term organizational performance. Selecting an appropriate strategic framework is therefore not merely a theoretical exercise but a practical necessity. Research published in the *Harvard Business Review* has demonstrated that companies aligning their strategies with suitable strategic frameworks achieve up to 25% higher profitability than organizations lacking a structured strategic approach [2]. This relationship underscores the importance of aligning strategic tools with organizational objectives and market conditions.

The consequences of strategic misalignment can be substantial. According to McKinsey & Company, nearly 70% of corporate failures are attributable to poor strategic decisions or the absence of a coherent strategy [3]. These findings emphasize the importance of strategic planning grounded in established theories and analytical frameworks. Over time, numerous strategic models and approaches have been developed, each characterized by specific strengths and limitations. Foundational frameworks, such as PESTEL (Political, Economic, Social, Technological, Environmental, Legal) analysis and Porter's Five Forces, emphasize the

analysis of the external environment, whereas resource-based approaches, including the VRIO (Value, Rarity, Imitability, Organization) framework and the Core Competence model, focus on internal organizational capabilities. More recent frameworks, such as Blue Ocean Strategy and the Balanced Scorecard, have introduced alternative perspectives on market positioning and strategic performance. However, given the wide variety of available approaches, organizations frequently face difficulties in selecting the most appropriate frameworks and integrating them effectively.

Strategic decision-making remains a cornerstone of corporate success, yet businesses are encountering increasing complexity in selecting and applying appropriate strategic frameworks. In an environment characterized by rapid technological change, evolving market conditions, and geopolitical uncertainty, organizations must ensure that their strategies are not only theoretically sound but also practically adaptable. Although traditional strategic models have been extensively studied, they often prove themselves insufficient for addressing the specific requirements of companies operating in diverse and rapidly changing business environments.

These challenges are particularly pronounced in multidivisional (M-form) organizations, where multiple business units operate with a degree of autonomy while simultaneously contributing to overall corporate objectives. Under such conditions, a uniform strategic approach is rarely effective. Instead, organizations require a nuanced understanding of which strategic frameworks are most appropriate for different industries and how

these frameworks can be integrated effectively. Without a structured approach to framework selection, organizations risk strategic misalignment, operational inefficiencies, and strategic inertia, ultimately reducing their competitive advantage.

Despite extensive academic research on strategy formulation, a significant gap remains regarding the effective integration of multiple strategic frameworks, their adaptation to industry-specific contexts, and their continuous refinement. Existing studies have primarily examined individual strategic models in isolation rather than their combined application within complex organizational structures. Addressing this gap is important for business leaders, strategists, and policy-makers seeking practical guidance for improving strategic decision-making.

This study addresses this issue by examining the practical application of strategic frameworks within a global software outsourcing company. Through case studies of five business units — Travel, Healthcare, iGaming, High-Tech, and Agritech — it has evaluated how different strategic tools perform across distinct industry contexts. The findings have contributed to a better understanding of framework selection and adaptation while providing practical recommendations for organizations seeking to improve strategic agility and implementation effectiveness.

An additional challenge arises from the often blurred distinction between the roles of strategists and managers in corporate organizations. Although both groups may employ similar strategic tools, their objectives and approaches differ substantially. Strategists primarily focus on long-term vision, market positioning, and organizational adaptability, whereas managers emphasize implementation, operational efficiency, and short-term problem solving. This distinction is frequently overlooked in the literature, creating ambiguity regarding the respective roles of strategy formulation and strategy implementation. A clear understanding of this distinction is essential for organizations seeking to balance long-term strategic development with effective operational execution.

The distinction between strategists and managers has been extensively examined in the literature. Mintzberg [4] emphasized the strategist's role in long-term planning and strategic foresight, contrasting it with the manager's focus on day-to-day operations. However, limited research has addressed the overlap between these roles and the ways organizations can integrate their functions during crises. For example, during the COVID-19 pandemic, many organizations required leaders to formulate long-term survival strategies while simultaneously managing operational disruptions — a dual role that remains insufficiently explored in the strategic management literature. In his subsequent work, Mintzberg [5] introduced the concepts of deliberate and emergent strategies, highlighting the importance of strategic flexibility in dynamic environments. Although Whittington [6] further developed the contextual application of these approaches, their integration remains insufficiently investigated. In particular, empirical evidence is limited regarding how organizations can effectively balance deliberate planning with emergent adaptation, especially during high-impact crises such as wars or pandemics. Existing studies have generally examined these approaches separately rather than as complementary components of strategic management. The Strategic Leadership Pyramid, which emphasizes the alignment of strategic objectives across all organizational levels, has been widely recognized in the literature [7]. However, its application in highly volatile and rapidly changing environments, including armed conflicts and pandemics, remains underexplored. The mechanisms through which leadership can maintain strategic alignment while ensuring organizational agility under crisis conditions continue to represent an open research question.

The distinction between corporate strategy, focused on portfolio management, and business strategy, concerned with competitive positioning, has been thoroughly established by Porter [8] and Ansoff [9]. Nevertheless, the interaction between these two strategic levels in multi-crisis environments, where organizations must simultaneously

respond to global and local challenges, has received relatively limited attention. Most existing studies have treated corporate and business strategies as separate and relatively static constructs rather than as dynamic and interdependent elements of strategic management. The Resource-Based View (RBV), developed by Barney [10], has provided an important theoretical foundation for explaining sustainable competitive advantage. However, its application under conditions of extreme environmental volatility remains insufficiently understood. In particular, limited attention has been paid to how organizations can sustain competitive advantage when critical resources are disrupted, depleted, or rapidly changing, as occurs during major supply-chain disruptions. Likewise, the relationship between the Resource-Based View and Blue Ocean Strategy [11], which emphasizes the creation of uncontested market space, requires further investigation. Innovation strategy, as discussed by Christensen [12], emphasizes the role of disruptive innovation in achieving organizational growth. Blue Ocean Strategy [13] complements this perspective by focusing on market creation rather than direct competition. However, relatively little research has examined the risks and limitations associated with these approaches under crisis conditions. Reference [14] discusses practical approaches to crisis management, including adaptive leadership, resource prioritization, and scenario planning. However, the study does not provide a detailed analysis of how specific strategic tools, such as the VRIO framework or PESTEL analysis, can be adapted to crisis conditions. Reference [15] has examined typologies and taxonomies for classifying crises and the corresponding response strategies. However, its analysis has been limited to the IT industry, thereby restricting the applicability of its findings to other sectors. Reference [16] emphasizes the role of data-driven decision-making and predictive analytics in strategy formulation, particularly under conditions of environmental uncertainty. However, the study primarily addresses technological aspects without integrating them into

broader strategic management frameworks. Reference [17] examines organizational patterns of generative AI adoption aimed at improving efficiency and fostering innovation but does not consider the associated risks and limitations. Finally, studies [18–21] have collectively demonstrated the growing role of artificial intelligence in shaping corporate strategy. AI technologies have increasingly become integral components of corporate foresight, enabling organizations to develop more data-driven, resilient, and adaptive strategies that respond effectively to rapidly changing market conditions.

Despite the wealth of strategic frameworks, methodologies, and tools available for corporate strategy development, there remains a significant gap in structural guidance for organizations on how to effectively navigate, select, and integrate these approaches. Existing literature extensively describes individual frameworks such as PESTEL analysis, Porter's Five Forces, VRIO, and Blue Ocean Strategy, highlighting their theoretical foundations and applications. However, it often lacks a cohesive structure that helps organizations determine:

1. When to use a specific framework based on their unique organizational context, such as industry type, environmental stability, or strategic objectives.
2. How to combine multiple frameworks to create a holistic and adaptable strategy, especially in complex and dynamic environments.
3. How to align these tools with organizational goals and capabilities to ensure effective implementation and measurable outcomes.

This lack of structured information creates challenges for practitioners, as they are left to navigate a fragmented landscape of methodologies without clear recommendations on their applicability or integration. As a result, organizations risk either underutilizing valuable tools or misapplying frameworks in ways that do not align with their strategic needs, leading to inefficiencies and suboptimal outcomes. Addressing this gap is crucial to enhancing the practical utility of strategic frameworks and empowering organizations to build ro-

bust, contextually relevant, and adaptable corporate strategies. This article seeks to fill this gap by classifying existing tools, providing actionable recommendations, and creating a decision-making guide to help organizations map frameworks to their specific contexts and integrate them effectively.

This article explores the science of strategy by delving into foundational theories and frameworks that shape corporate decision-making. By examining their practical applications and outcomes, we aim to illuminate the pathways through which organizations can achieve sustainable growth and resilience in an era of unprecedented challenges and opportunities.

While existing literature extensively discusses strategic frameworks in theoretical contexts, there remains a lack of empirical research on their practical application within complex organizational structures. This study addresses this gap by examining real-life case studies, providing tangible insights into how strategic models function in dynamic business environments.

The study aims to demonstrate how organizations can optimize strategy development by tailoring framework selection to industry-specific needs and through case studies to highlight the successes and limitations of various strategic models across distinct business units.

This study explores the application of strategic frameworks in the development of tailored strategies within an M-structured organization or multidivisional structure (M-form), is a corporate structure where a company is divided into multiple semi-autonomous business units or divisions. Each division operates independently, often with its own management team, strategy, and financial responsibilities, while being overseen by a central corporate headquarters that provides strategic direction, resource allocation, and overall governance. Using the example of Intellias, a global software outsourcing company, and its Digital Segment, comprising five independently operating Business Units — Travel, Healthcare, High-Tech, iGaming, and Agritech — this analysis demonstrates how leaders within these units

approached the strategic process by leveraging the categorized frameworks.

The M-structure allows each Business Unit to function relatively autonomously, enabling customized strategies to address the unique demands of their respective markets. However, this independence also presents challenges in ensuring alignment with the overarching corporate strategy. The categorization of frameworks across the five stages of strategy formulation and implementation — Environmental Analysis, Strategic Options, Strategy Design, Implementation, and Monitoring and Refinement — provided a structured methodology for decision-making.

These case studies illustrate the decision-making processes of Business Unit leaders as they selected and applied different frameworks to their unique contexts. The analysis highlights successes, inefficiencies, and lessons learned over a one-year period, offering insights into the strategic dynamics of a diversified organization. The outcomes of these strategies reveal patterns of effective framework utilization, areas of misalignment, and the challenges of integrating independent Business Unit strategies into a cohesive corporate vision.

The following case studies delve into each Business Unit's journey, providing practical examples of how frameworks were chosen, adapted, and evaluated. These narratives aim to serve as a guide for academics and practitioners seeking to understand the application of strategic methodologies in complex organizational structures. Strategic frameworks and methodologies provide structured approaches for organizations to analyze their environment, generate strategic options, design actionable plans, implement strategies, and continuously refine them. These tools help businesses navigate complex decision-making by offering insights into market dynamics, competitive positioning, resource allocation, and operational execution. While some frameworks focus on understanding external factors (e.g., PESTEL, Porter's Five Forces), others guide strategic planning (e.g., Ansoff Matrix, Blue Ocean Strategy), organizational alignment (e.g., McKinsey 7S, Balanced

Scorecard), execution management (e.g., OKRs, Lean Startup), and ongoing adaptation (e.g., Dynamic Capabilities, Emergent Strategy). The following Table categorizes key strategic tools, outlining their strengths, limitations, and applicability in different business contexts.

In an M-structured organization, the company is divided into several business units, each operating independently with its own strategy. While each unit focuses on its specific goals and objectives, all strategies are aligned and correlated with the overall corporate vision. This ensures that despite their autonomy, the business units contribute collectively to the company's success, fostering collaboration and coherence across the organization. In this article presented approach of each Business Unit to create own Strategy. Alignment of these strategies between each other is out of scope of this article.

CASE STUDY 1: BUSINESS UNIT TRAVEL

The Travel Business Unit operates independently within the M-structured Intellias Digital Segment. It addresses software needs in travel management, booking systems, and logistics optimization. This Business Unit faced the challenge of choosing strategic frameworks suitable for its dynamic and competitive market while ensuring alignment with the broader Digital Segment's objectives. The categorization of strategic frameworks (Table 1) served as the foundation for the selection process at each stage of the strategy cycle. The Travel Business Unit began by identifying frameworks for understanding the external and internal environment (Table 1). The leadership team shortlisted PESTEL Analysis and Porter's Five Forces, considering their relevance to the travel industry.

- ◆ PESTEL Analysis was initially selected to provide a macro-level understanding of factors like economic trends and environmental concerns. The team used it to assess the regulatory impact of data privacy laws and the technological shift toward AI in travel.

- ◆ Porter's Five Forces was chosen to complement PESTEL by offering a deeper focus on the competitive landscape. It provided insights into buyer power, threats from substitutes like direct-to-consumer platforms, and supplier dynamics.

Process of Selection: The leadership team conducted a comparative review using the criteria of ease of application, depth of insights, and resource requirements. PESTEL offered broad contextual insights but required customization for dynamic changes in the travel industry, while Porter's Five Forces was deemed more actionable for immediate competitive analysis.

To generate and prioritize growth strategies, the team referred to frameworks in Table 1. They shortlisted the Ansoff Matrix and Blue Ocean Strategy based on their capacity to suggest actionable paths for innovation and market expansion (Table 1).

- ◆ The Ansoff Matrix was chosen first, as it provided a structured way to explore growth through market penetration and product development. This was particularly useful for short-term planning.
- ◆ The Blue Ocean Strategy was considered next for identifying untapped market opportunities and long-term differentiation. The team brainstormed ideas for innovative subscription models but struggled with the high level of abstraction required for initial application.

A pilot approach was adopted: the team applied both frameworks to a specific use case — developing an AI-driven itinerary planner. The Ansoff Matrix has been proved more effective for short-term actionable decisions, while Blue Ocean Strategy is retained for future innovation projects due to its resource-intensive nature.

When structuring the strategic roadmap (Table 1), the team chose the Balanced Scorecard for its ability to align measurable objectives with organizational goals. They also explored the Three Horizons Framework to balance immediate, mid-term, and long-term initiatives.

- ◆ Balanced Scorecard: The leadership team appreciated its clarity in linking strategic objectives

Table 1. Frameworks and Methodologies for Strategy Development

Framework/Tool	Pros	Cons
<i>A. Tools for Environmental Analysis (Understanding Context)</i>		
PESTEL Analysis [22]	Identifies macro trends; considers political, economic, social, technological, environmental, and legal factors for comprehensive insight	Static; lacks real-time adaptability to rapidly changing conditions
Porter's Five Forces [23]	Offers detailed insights into industry competitiveness by analyzing supplier power, buyer power, competitive rivalry, threat of substitutes, and threat of new entrants	Limited adaptability in dynamic and fast-evolving markets
SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis [28]	Simple and widely recognized; balances internal (strengths and weaknesses) and external (opportunities and threats) factors	Oversimplifies complex dynamics; heavily dependent on the quality of input data
CAGE (Cultural, Administrative, Geographic, Economic) Framework [29]	Effectively assesses global challenges and cross-border factors such as cultural, administrative, geographic, and economic differences	Limited applicability for domestic or localized strategies
Scenario Planning [23, 30]	Flexible and adaptable for analyzing future uncertainties and multiple possible scenarios	Resource-intensive; requires deep expertise and significant time investment
TOWS (Threats, Opportunities, Weaknesses, Strengths) Matrix [56]	Provides a structured way to prioritize strategic actions by linking external opportunities/threats to internal strengths/weaknesses	Relies heavily on the quality of the SWOT analysis it builds upon
Risk-Return Tradeoff Model [44]	Balances risks and rewards, aiding decision-making in uncertain scenarios with financial metrics	Overly focused on financial aspects; may ignore qualitative or long-term implications
<i>B. Strategic Options (Generating and Prioritizing Ideas)</i>		
Ansoff Matrix [25, 36]	Simple and easy-to-use framework for exploring growth strategies through market penetration, market development, product development, and diversification	Oversimplifies complex strategic decisions; lacks consideration for external dynamics
BCG (Boston Consulting Group) Growth-Share Matrix [37]	Helps prioritize investment by categorizing business units or products into cash cows, stars, question marks, and dogs	Static; ignores market dynamics and external factors influencing categories
Blue Ocean Strategy [32]	Encourages innovation by identifying untapped markets and creating new demand, reducing competition	High-risk execution; requires significant investment with uncertain outcomes
Core Competence Framework [31]	Focuses on leveraging long-term organizational strengths to gain a competitive edge	Requires significant introspection; may overlook external market shifts
VRIO Framework [24]	Prioritizes resources and capabilities that provide sustainable competitive advantage (Valuable, Rare, Inimitable, Organized)	Ignores external market dynamics; better suited for internal analysis
VRIN(Value, Rarity, Imitability, Non-substitutability) Framework [58]	Builds on VRIO by emphasizing differentiation of resources (Valuable, Rare, Inimitable, Non-substitutable)	Neglects external trends; limited application for broader strategic planning

Framework/Tool	Pros	Cons
Global Strategy Diamond [45]	Provides a comprehensive approach to market entry strategies by addressing arenas, vehicles, differentiators, staging, and economic logic	Limited focus on cultural and local factors that may significantly impact strategy
Jobs-to-be-Done Framework (JTBD) [60]	Shifts strategic focus to solving customer needs and desired outcomes rather than just product features	Requires deep customer insights and data, which may be resource-intensive to obtain
<i>C. Strategy Design (Creating the Roadmap)</i>		
McKinsey 7S Framework [26]	Aligns key organizational elements (strategy, structure, systems, shared values, skills, staff, and style) for cohesive implementation	Difficult to prioritize elements; requires thorough organizational understanding
OGSM (Objectives, Goals, Strategies, Measures) Framework [47]	Aligns overarching objectives with specific, measurable goals, strategies, and actions for clear direction	Can become overly rigid and fail to adapt to unforeseen changes
Balanced Scorecard [33, 55]	Provides a structured way to link strategy with performance metrics across financial, customer, internal processes, and learning perspectives	Requires cultural alignment and organizational buy-in; expanded version adds complexity with ESG (Environmental, Social, Governance) metrics
Playing to Win Framework [46]	Offers clear guidance on strategic decision-making by focusing on winning aspirations, market positioning, and core capabilities	Assumes stable market dynamics; less effective in highly volatile environments
Three Horizons Framework [39, 41]	Balances short-term performance with long-term growth by managing current business, scaling, and innovation initiatives	Requires significant foresight and disciplined execution; challenging to allocate resources effectively
Hoshin Kanri [40]	Aligns organizational goals with daily activities and ensures strategic focus through consistent review cycles	Requires disciplined execution and can be challenging in decentralized or large organizations
<i>D. Strategy Implementation (Executing the Plan)</i>		
RACI (Responsible, Accountable, Consulted, Informed) Matrix [42]	Clearly defines roles and responsibilities, ensuring accountability and reducing confusion in execution	Limited to role-based challenges; may not address broader organizational complexities
OKRs (Objectives and Key Results) [48]	Drives focus and alignment across teams through measurable and actionable goals	Relies on organizational discipline and regular reviews to remain effective
SAFE Framework (Scaled Agile) [57]	Facilitates enterprise-wide agility by integrating scaled agile practices for large organizations	Requires significant cultural change and training to implement effectively
Lean Startup Methodology [50]	Promotes rapid experimentation and iteration, making it highly adaptable in uncertain or evolving environments	Less effective in highly regulated industries or for long-term, stable business models
Design Thinking Framework [51]	Encourages creativity and user-centered problem-solving through iterative design processes	Time-intensive and may require cultural shifts for organizations unaccustomed to iterative development

End of Table 1

Framework/Tool	Pros	Cons
Lean Six Sigma [53]	Drives efficiency and quality by combining Lean principles with Six Sigma's focus on reducing variability	Less effective in creative or highly innovative industries
ADKAR (Awareness, Desire, Knowledge, Ability, Reinforcement) Change Management Framework [59]	Simplifies change processes by focusing on Awareness, Desire, Knowledge, Ability, and Reinforcement	Limited effectiveness in addressing highly complex or large-scale transformations
<i>E. Monitoring and Refinement (Adapting the Strategy)</i>		
Balanced Scorecard (Expanded) [55]	Integrates traditional performance metrics with environmental, social, and governance (ESG) goals for a holistic approach	Complex implementation; requires extensive data and organizational alignment
Dynamic Capabilities Framework [38]	Emphasizes the ability to adapt and reconfigure resources in response to changing environments	Conceptually complex; challenging to operationalize effectively
Deliberate Strategy [34]	Provides a clear and focused roadmap for achieving specific goals	Inflexible in volatile environments where rapid adaptation is required
Emergent Strategy [35]	Allows for flexibility and adaptability by developing strategy incrementally in uncertain conditions	Lacks predictability; may lead to inconsistent outcomes without clear guiding principles
Hockey Stick Growth Model [49]	Effective for tracking growth trajectories in innovation-driven companies, highlighting potential rapid scaling	Unrealistic in slow-growth industries; overly optimistic for many scenarios
Value Proposition Canvas [54]	Focuses on aligning product/service features with customer needs for better market fit	Narrow in scope; does not address broader strategic considerations

Source: created by author.

to performance metrics. They found it particularly helpful for operationalizing goals like reducing development cycle times and improving customer satisfaction.

- ◆ **Three Horizons Framework:** This framework added value by categorizing initiatives into distinct timelines. However, its application required significant foresight, which was challenging for team members unfamiliar with long-term strategic planning.

After initial struggles with the Three Horizons Framework, the team incorporated a workshop to simplify the process, focusing on practical examples from similar industries. The Balanced Scorecard emerged as the primary tool for strategy de-

sign, with the Three Horizons Framework as a supplementary resource.

During the implementation phase (Table 1), the RACI Matrix was selected to assign roles and responsibilities clearly. This was particularly important in the Travel Business Unit's M-structured setup, where collaboration across multiple independent teams was essential.

- ◆ **RACI Matrix:** The team held an alignment session to ensure clarity in responsibilities. While effective for defining roles, the matrix revealed gaps in inter-Business Unit workflows, requiring additional coordination mechanisms.

The team evaluated alternatives like OKRs for driving focus but found the RACI Matrix more

suitable for addressing immediate role-based accountability. However, they recognized the need for complementary tools to manage cross-functional collaboration.

For monitoring and refinement (Table 1), the leadership team tested the Balanced Scorecard (Expanded) and the Emergent Strategy framework.

- ◆ **Balanced Scorecard (Expanded):** Although the expanded version initially showed promise, incorporating ESG metrics increased its complexity and required additional implementation expertise.
- ◆ **Emergent Strategy:** This framework was introduced mid-year to address rapidly changing market conditions. The team conducted bi-monthly reviews to incorporate emerging trends into the strategic roadmap.

The team realized that the Expanded Balanced Scorecard required more resources than anticipated, leading them to prioritize Emergent Strategy for short-term adaptability. They retained the Balanced Scorecard for tracking core metrics while refining its ESG components incrementally.

Lessons Learned:

1. Framework selection benefits from pilot testing on specific use cases, ensuring tools fit both the team's capabilities and the industry's dynamics.
2. A combination of complementary frameworks often yields better results than reliance on a single tool, as demonstrated by the joint application of PESTEL and Porter's Five Forces.
3. Frameworks requiring extensive foresight or resource investment, like the Three Horizons Framework and Blue Ocean Strategy, should be introduced gradually and supplemented with hands-on training.
4. The flexibility of emergent approaches can mitigate the challenges posed by rigid, pre-planned frameworks in dynamic industries.

The Travel Business Unit demonstrated several strengths in its approach to strategic framework selection. The effective use of complementary frameworks, such as PESTEL Analysis and Porter's Five Forces, provided a well-rounded understanding of the external environment. This dual app-

roach ensured the team considered both broad macroeconomic trends and immediate competitive dynamics. Additionally, the Ansoff Matrix has been proved practical for prioritizing actionable growth strategies, particularly in market and product development. The team also effectively piloted the Blue Ocean Strategy on an innovative subscription model, allowing them to explore long-term differentiation without overcommitting resources. The RACI Matrix successfully clarified accountability during the implementation phase, reducing confusion and ensuring individual roles were well-defined. Moreover, the integration of Emergent Strategy mid-process enabled the Business Unit to adapt proactively to rapidly changing market conditions. The structured categorization of frameworks into stages further streamlined decision-making, ensuring logical and purposeful tool application.

However, there were areas for improvement. The reliance on resource-intensive frameworks, such as the Balanced Scorecard (Expanded) and Blue Ocean Strategy, strained the team's capacity. A phased or simplified approach to implementing these tools might have been more practical. Challenges with long-term planning emerged when applying the Three Horizons Framework, highlighting a need for additional training or simpler methods to enhance its usability. Collaboration across the M-structure remained a challenge, even with the clarity provided by the RACI Matrix, suggesting the need for better communication and workflow integration tools. Monitoring insights from the Balanced Scorecard (Expanded) were underutilized due to the complexity of integrating ESG metrics, which delayed actionable insights. Testing frameworks like Blue Ocean Strategy without clear operationalization plans also reduced their effectiveness.

To address these challenges, the Travel Business Unit could benefit from enhanced training and awareness programs to improve the understanding of resource-intensive frameworks. Introducing collaboration tools or processes would facilitate better communication and coordination across Business Units. Adopting a phased approach to complex

frameworks, starting with smaller applications, would allow the team to build confidence and expertise. Simplifying monitoring metrics, such as beginning with a standard Balanced Scorecard and gradually integrating ESG components, could deliver more immediate value. Finally, conducting pilot tests of unfamiliar frameworks on smaller projects would provide a controlled environment for evaluation and refinement before full deployment. By building on its strengths and addressing these areas for improvement, the Travel Business Unit can refine its strategic framework selection process for greater effectiveness and efficiency in future cycles.

CASE STUDY 2: HEALTHCARE BUSINESS UNIT OF INTELLIAS DIGITAL SEGMENT

The Healthcare Business Unit within Intellias Digital Segment specializes in developing software solutions for electronic health records (EHRs), telemedicine, and patient management systems. Operating in a highly regulated and innovation-driven sector, the Business Unit faces challenges such as compliance with global health regulations, rapid technological advancements, and increasing customer demand for secure, scalable, and efficient solutions. The strategic framework categorization (Table 1) guided the leadership team in selecting the most appropriate tools for each stage of strategy definition.

To assess its external and internal environment, the Healthcare Business Unit leadership selected CAGE Framework and Scenario Planning. The CAGE Framework was used to analyze cross-border challenges such as varying regulatory requirements, cultural expectations in healthcare delivery, and economic disparities affecting technology adoption in different regions. This analysis has been proved valuable in identifying key markets with high potential for telemedicine solutions. Complementing this, Scenario Planning helped the team anticipate regulatory changes and disruptions, such as new data privacy laws or the emer-

gence of pandemics, which could significantly impact operations.

The decision to use both frameworks was based on their ability to provide macro and forward-looking insights. While CAGE offered a structured way to evaluate regional markets, Scenario Planning added flexibility to prepare for uncertainties. However, Scenario Planning initially overwhelmed the team due to its complexity, prompting additional sessions to simplify its application.

The Business Unit explored strategic options using the Core Competence Framework and Jobs-to-be-Done (JTBD) Framework. The Core Competence Framework helped identify the Business Unit's strengths in scalable telemedicine platforms and robust compliance solutions. These were positioned as key competitive advantages to differentiate the Business Unit from competitors. Meanwhile, the JTBD Framework shifted the focus from internal capabilities to customer needs, uncovering new opportunities to address pain points such as fragmented patient data and limited accessibility in underserved regions.

Both frameworks were effective, but their application revealed contrasting challenges. The Core Competence Framework required significant introspection and was time-intensive, while the JTBD Framework necessitated extensive customer research. Despite these challenges, the combination of these tools offered a balanced perspective on internal strengths and external opportunities.

For strategy design, the Healthcare Business Unit opted to use components of Hoshin Kanri method and the OGSM Framework. Hoshin Kanri provided a structured approach to align BusinessUnit goals with daily operations, ensuring that regulatory compliance, innovation, and customer satisfaction were integrated into actionable plans. On the other hand, the OGSM Framework simplified the alignment of high-level objectives with measurable goals, strategies, and tactics, offering clarity to all stakeholders.

Hoshin Kanri has proved effective in translating complex strategic objectives into manageable operational tasks. However, its disciplined implemen-

tation was challenging in the fast-paced healthcare environment. By contrast, the OGSM Framework was easier to implement but required frequent updates to remain effective under rapidly changing conditions. Ultimately, the two frameworks complemented one another: Hoshin Kanri supported operational alignment, whereas the OGSM Framework enhanced clarity in strategic planning.

During the implementation phase, the Healthcare Business Unit chose SAFE Framework (Scaled Agile) and Lean Six Sigma to execute its strategy. The SAFE Framework facilitated enterprise agility by enabling rapid iterations and alignment across teams, particularly in developing new telemedicine features. Lean Six Sigma was deployed to optimize processes, reduce defects in EHR integrations, and ensure compliance with stringent healthcare standards.

While the SAFE Framework improved adaptability and collaboration, it required significant cultural changes and training to implement effectively. Lean Six Sigma excelled in process efficiency but struggled to accommodate creative problem-solving, which was often required in innovative projects. The Business Unit recognized that SAFE's agility and Lean Six Sigma's process discipline needed to work in tandem for optimal results.

To monitor and refine the strategy, the team relied on the Balanced Scorecard (Expanded) and TOWS Matrix. The Balanced Scorecard (Expanded) provided a comprehensive view of performance metrics, including financial, customer, internal processes, and ESG considerations. However, the complexity of integrating ESG metrics into the existing scorecard delayed its full adoption. The TOWS Matrix, on the other hand, prioritized strategic actions by linking identified threats and opportunities to internal strengths and weaknesses. This helped the team remain agile in addressing compliance challenges and emerging market demands.

The team found that the Balanced Scorecard was more suitable for long-term monitoring, while the TOWS Matrix provided immediate guidance for addressing short-term challenges. Both tools

were effective but required consistent review cycles to maintain relevance.

The Healthcare Business Unit effectively used frameworks like the CAGE Framework and Scenario Planning to gain a nuanced understanding of market dynamics and regulatory challenges. The combination of Core Competence and JTBD frameworks provided a balanced approach to internal capabilities and customer needs. Hoshin Kanri and the OGSM Framework were instrumental in aligning strategic goals with day-to-day operations, while SAFE and Lean Six Sigma enabled agile and efficient implementation. Monitoring tools like the Balanced Scorecard (Expanded) and TOWS Matrix ensured ongoing adaptability and performance tracking.

The application of resource-intensive frameworks like Scenario Planning and the Balanced Scorecard (Expanded) highlighted the need for simplified processes and better training. Cultural resistance to the SAFE Framework slowed its adoption, suggesting a need for a phased implementation approach. Additionally, the Lean Six Sigma framework's rigidity sometimes conflicted with the creative requirements of innovative projects. Finally, the complexity of integrating ESG metrics into monitoring processes delayed actionable insights, indicating the importance of incremental implementation.

CASE STUDY 3: IGAMING BUSINESS UNIT OF INTELLIAS DIGITAL SEGMENT

The iGaming Business Unit within Intellias Digital Segment focuses on developing platforms for online gaming, gambling, and sports betting. Operating in a fast-paced and highly competitive market, the Business Unit faced challenges such as evolving consumer preferences, regulatory restrictions, and the need to integrate cutting-edge technologies like blockchain and VR. Given the dynamic nature of the industry, the leadership team sought to apply strategic frameworks from the categorized list (Table 1) to craft and refine its strategy. However, early applications of tools used successfully by other Business Units yielded un-

satisfactory results, prompting the selection of alternative frameworks.

The leadership initially applied the PESTEL Analysis and CAGE Framework, following the success of these tools in the Travel and Healthcare Business Units.

- ◆ PESTEL Analysis: While it highlighted technological opportunities such as blockchain adoption and identified political risks related to gambling regulations, the insights were too broad and lacked the specificity required to address immediate industry dynamics.
- ◆ CAGE Framework: Although useful in the Healthcare Business Unit for cross-border challenges, the CAGE analysis in iGaming failed to offer actionable differentiation. The regulatory and cultural factors it emphasized were already well-known to the team and aligned with existing compliance efforts.

Outcome: The team found these tools insufficiently focused for the iGaming sector, where rapid changes in consumer behaviour and technological trends demanded a more granular, real-time approach.

Alternative Selection: The team turned to Scenario Planning, which allowed them to develop strategies for potential regulatory changes and technological breakthroughs. This framework provided the flexibility to anticipate scenarios like the legalization of online betting in new markets or rapid adoption of blockchain technologies.

For strategic growth planning, the iGaming Business Unit first attempted to use the Ansoff Matrix and Core Competence Framework, as successfully applied in the Travel and Healthcare Business Unit's.

- ◆ Ansoff Matrix: While effective in the Travel Business Unit, the matrix oversimplified the complexities of the iGaming market. For instance, expanding into new markets was not merely a "market development" decision but involved navigating diverse regulatory frameworks, which the matrix did not address.
- ◆ Core Competence Framework: This tool was less effective in iGaming because it focused in-

ternally, whereas the Business Unit needed to emphasize external customer demands and market trends.

Outcome: Both frameworks failed to guide decisions effectively, as they lacked adaptability to the highly dynamic and fragmented iGaming industry.

Alternative Selection: The Business Unit adopted the Blue Ocean Strategy and Jobs-to-be-Done (JTBD) Framework. The Blue Ocean Strategy was instrumental in identifying untapped opportunities in gamification and loyalty programs for casual gamers, steering away from oversaturated competitive segments. The JTBD Framework helped uncover pain points for users, such as seamless wallet integration for cryptocurrencies, and guided the development of solutions tailored to customer needs.

Initially, the team chose Hoshin Kanri, influenced by its successful application in the Healthcare Business Unit.

- ◆ Hoshin Kanri: Although it provided a structured alignment between strategic goals and daily tasks, the rigid implementation struggled to keep pace with the rapid innovations required in iGaming. The team often found itself constrained by the structured approach when quick pivots were necessary.

Outcome: The overly disciplined nature of Hoshin Kanri proved unsuitable for the iGaming context, where agility is a key competitive advantage.

Alternative Selection: The Business Unit switched to the OGSM Framework for its simplicity and focus. This framework allowed them to quickly outline objectives, measurable goals, and actionable strategies, aligning with the fast-moving nature of the iGaming industry. OGSM proved particularly useful for short-term initiatives like launching VR gaming features and blockchain integration.

For implementation, the iGaming Business Unit initially relied on the Lean Six Sigma framework, following its success in the Healthcare Business Unit.

- ◆ Lean Six Sigma: While effective in reducing defects and ensuring process efficiency in Healthcare, it fell short in iGaming due to its rigid focus on operational consistency. Innovation-driven

projects, such as designing blockchain-based betting systems, were hindered by the framework's lack of flexibility.

The tool stifled creative problem-solving and delayed the progress of high-priority projects, making it clear that a more adaptive framework was needed. The Business Unit adopted the SAFE Framework (Scaled Agile), which provided the flexibility to iterate rapidly on innovative projects. SAFE's iterative cycles allowed teams to continuously improve features like live game streaming and cryptocurrency payments based on user feedback.

Initially, the Business Unit implemented the Balanced Scorecard (Expanded) to monitor its strategy, inspired by its use in the Healthcare Business Unit.

- ◆ **Balanced Scorecard (Expanded):** While comprehensive, the inclusion of ESG metrics and a broad set of KPIs created complexity and diluted the focus on critical performance metrics. The team struggled to extract actionable insights in a timely manner.

The tool's complexity overwhelmed the Business Unit, slowing down decision-making in a fast-paced industry. The team replaced it with the TOWS Matrix, which provided a more agile approach by linking threats and opportunities directly to internal strengths and weaknesses. This streamlined monitoring and enabled quicker responses to challenges like regulatory changes and technological disruptions.

The Business Unit's ability to pivot and test alternative frameworks demonstrated adaptability and a commitment to finding the best tools for its dynamic industry. The use of Scenario Planning helped anticipate and prepare for regulatory shifts and technological disruptions. The Blue Ocean Strategy and JTBD Framework uncovered innovative opportunities in casual gaming and cryptocurrency integration. The OGSM Framework and SAFE Framework enabled quick execution of projects, aligning well with the fast-moving iGaming market. Finally, the TOWS Matrix offered a practical and agile approach to monitoring, ensuring timely responses to industry challenges.

The initial over-reliance on frameworks successful in other Business Units highlighted the need for a more tailored approach. Frameworks like PESTEL, CAGE, and Lean Six Sigma, while effective elsewhere, lacked the adaptability required in iGaming. Earlier pilot testing of these tools could have identified their limitations sooner, avoiding delays. Additionally, the team could have invested in better training to simplify the application of complex frameworks like the Balanced Scorecard (Expanded).

CASE STUDY 4: HIGH-TECH BUSINESS UNIT OF INTELLIAS DIGITAL SEGMENT

The High-Tech Business Unit at Intellias focuses on cutting-edge software solutions, including AI, IoT, and edge computing. Operating in a highly innovative and competitive environment, the Business Unit faced challenges such as rapid technology obsolescence, intense global competition, and the need to consistently deliver innovative solutions. The Business Unit attempted to leverage frameworks successfully used by other Business Units but faced mixed results, prompting them to adjust their approach using the categorization from Appendices A-F.

The leadership began by applying Scenario Planning and Porter's Five Forces, inspired by their use in the Travel and iGaming Business Units.

- ◆ **Scenario Planning:** Initially chosen for its ability to model uncertain technological advancements and potential disruptions, the framework proved overly complex and resource-intensive. The Business Unit struggled to generate actionable scenarios due to the unpredictable nature of the high-tech industry.
- ◆ **Porter's Five Forces:** While it highlighted intense competitive rivalry and the high threat of new entrants, the framework's static nature was insufficient for the rapidly evolving high-tech market.

Outcome: Both frameworks provided valuable insights but fell short of addressing the fast pace of change and the need for real-time adaptability.

Alternative Selection: The team pivoted to using the Dynamic Capabilities Framework, which emphasized the Business Unit's ability to reconfigure and adapt resources to technological and market shifts. This framework provided a more flexible and iterative approach, aligning better with the demands of the high-tech industry.

To generate strategic growth options, the High-Tech Business Unit initially relied on the Blue Ocean Strategy and Ansoff Matrix, inspired by their effectiveness in the iGaming and Travel Business Units.

- ◆ **Blue Ocean Strategy:** The framework's focus on creating untapped market opportunities initially seemed promising but failed to yield actionable insights due to the high-tech sector's reliance on existing technological ecosystems and partnerships.
- ◆ **Ansoff Matrix:** While effective for simpler industries, it oversimplified the complexity of integrating emerging technologies into new markets and underestimated the need for ecosystem alignment.

Outcome: Neither framework adequately addressed the interconnected and fast-moving nature of the high-tech sector.

Alternative Selection: The Business Unit adopted the Jobs-to-be-Done (JTBD) Framework to identify specific customer needs, such as optimizing edge computing for real-time analytics. This framework provided a granular, user-focused perspective, helping the team design solutions tailored to evolving demands. Additionally, the VRIO Framework was used to assess and prioritize unique capabilities, such as proprietary AI algorithms, which gave the Business Unit a competitive edge.

The team initially chose the OGSM Framework for strategy design, as it was successful in the iGaming Business Unit, but its rigid structure presented challenges in aligning with the Business Unit's need for continuous innovation.

- ◆ **OGSM Framework:** While useful for setting measurable goals, the framework's linear approach failed to accommodate the iterative development cycles required for high-tech innovation.

Outcome: The OGSM Framework proved insufficiently flexible for the Business Unit's dynamic needs.

Alternative Selection: The team turned to the Three Horizons Framework, which allowed them to balance current projects (Horizon 1), scaling innovations (Horizon 2), and exploring emerging technologies (Horizon 3). This framework's forward-looking structure aligned well with the Business Unit's innovation-driven focus.

For strategy execution, the Business Unit initially tried SAFE Framework (Scaled Agile), inspired by its successful use in the iGaming Business Unit.

- **SAFE Framework:** While it facilitated agility in other Business Units, its enterprise-wide focus created inefficiencies in the high-tech context, where smaller, specialized teams drive innovation. The framework's layers of coordination slowed decision-making.

Outcome: SAFE proved overly complex and cumbersome for the High-Tech Business Unit's fast-paced and decentralized workflows.

Alternative Selection: The Business Unit adopted Lean Startup Methodology, which allowed for rapid prototyping, iterative testing, and quick pivots. This methodology was more suited to the experimental nature of high-tech projects, enabling the team to validate ideas and minimize risks.

The Business Unit initially applied the Balanced Scorecard (Expanded) to monitor performance, inspired by its application in the Healthcare Business Unit.

- ◆ **Balanced Scorecard (Expanded):** The comprehensive nature of this framework provided broad insights, but the integration of ESG metrics and a wide range of KPIs created complexity. The focus on long-term metrics conflicted with the Business Unit's need for quick adaptability.

Outcome: The framework's complexity reduced its practicality in the high-tech sector, where short-term iteration is critical.

Alternative Selection: The team opted for the Emergent Strategy framework, which allowed them to adjust their approach dynamically based on real-time feedback from projects and market

trends. This framework proved invaluable for refining solutions like IoT platforms and AI models based on user and client feedback.

The High-Tech Business Unit demonstrated flexibility in adjusting its framework selection to better suit its industry. The adoption of the Dynamic Capabilities Framework provided a solid foundation for navigating rapid technological shifts. The JTBD Framework enabled the team to align closely with customer needs, while the Three Horizons Framework supported a balanced focus on current projects and future innovations. The Lean Startup Methodology proved particularly effective in driving rapid experimentation and minimizing risks. Finally, the Emergent Strategy framework ensured adaptability, allowing the Business Unit to refine its approach based on evolving market demands.

The initial reliance on frameworks successful in other Business Units, such as Scenario Planning, Blue Ocean Strategy, and SAFE, revealed their limitations in addressing the unique challenges of the high-tech sector. Early pilot testing of these tools could have identified their misalignment sooner. The team also struggled with the complexity of comprehensive frameworks like the Balanced Scorecard (Expanded), suggesting the need for simpler, more agile monitoring tools. Additionally, better alignment between framework selection and the Business Unit's decentralized workflows could have improved efficiency during implementation. By learning from these experiences and adapting its approach, the High-Tech Business Unit successfully refined its strategic framework selection to align with the fast-paced, innovation-driven demands of its industry. This case underscores the importance of tailoring framework choices to industry-specific dynamics rather than replicating successes from unrelated domains.

CASE STUDY 5: AGRITECH BUSINESS UNIT OF INTELLIAS DIGITAL SEGMENT

The Agritech Business Unit of Intellias focuses on developing digital solutions for precision agriculture, supply chain optimization, and smart farming.

Operating in a sector driven by sustainability, technological adoption, and weather-related risks, the Business Unit faced challenges such as adapting to regional agricultural practices, addressing sustainability demands, and competing with established global players. While the team initially adopted frameworks that proved successful in other Business Units, their results varied, prompting adjustments using the categorized tools from Appendices A—F.

The leadership team initially applied PESTEL Analysis and Dynamic Capabilities Framework, inspired by their effectiveness in the Travel and High-Tech Business Units.

- ◆ **PESTEL Analysis:** This framework identified macro-level trends such as government subsidies for sustainable farming (political), increasing adoption of IoT devices (technological), and growing concerns over climate change (environmental). However, the broad nature of insights made it difficult to connect findings to specific strategies.

- ◆ **Dynamic Capabilities Framework:** While useful in the High-Tech Business Unit, its emphasis on adapting resources to changing environments was too abstract for Agritech's need to address region-specific agricultural practices.

Outcome: Both frameworks provided valuable but high-level insights that lacked actionable specificity for Agritech's challenges.

Alternative Selection: The team turned to the CAGE Framework, which allowed for a more granular analysis of regional differences in cultural, administrative, geographic, and economic factors. This framework enabled the team to tailor solutions for local farming communities, particularly in regions with varying levels of technological adoption.

To identify and prioritize strategic growth options, the Agritech Business Unit initially used Blue Ocean Strategy and Core Competence Framework, inspired by their application in the iGaming and Healthcare Business Units.

- ◆ **Blue Ocean Strategy:** The framework's focus on creating uncontested market spaces was promi-

sing but proved impractical in a highly fragmented and competitive sector like agriculture, where local incumbents dominate.

- ◆ **Core Competence Framework:** While this tool helped identify internal strengths like AI-driven crop monitoring, it failed to address external factors critical to Agritech's success, such as customer acceptance and scalability challenges.

Outcome: These frameworks did not adequately capture the interplay between internal capabilities and external regional factors in the Agritech sector.

Alternative Selection: The Business Unit adopted the Ansoff Matrix and Jobs-to-be-Done (JTBD) Framework. The Ansoff Matrix provided a clear structure for exploring market penetration and diversification strategies, while the JTBD Framework helped uncover specific farmer needs, such as reducing input costs and improving yield forecasting accuracy. This combination allowed the Business Unit to balance internal capabilities with external market demands.

For strategy design, the Business Unit initially applied the Three Horizons Framework, following its success in the High-Tech Business Unit.

- ◆ **Three Horizons Framework:** While it effectively categorized initiatives into short-, medium-, and long-term horizons, the framework's focus on innovation conflicted with Agritech's immediate need to address basic infrastructure gaps in underdeveloped regions.

Outcome: The framework did not align well with the Business Unit's priorities, as it overlooked the foundational challenges faced by its target markets.

Alternative Selection: The team chose Hoshin Kanri for its structured approach to aligning strategic goals with operational activities. This framework allowed the Business Unit to set clear, actionable targets for addressing regional infrastructure gaps while still planning for future innovation. Its disciplined execution suited Agritech's structured operational requirements.

During the implementation phase, the Business Unit initially applied SAFE Framework (Scaled Agile), inspired by its success in other Business Units like iGaming.

- ◆ **SAFE Framework:** The framework's enterprise-wide focus created inefficiencies, as the decentralized and region-specific nature of Agritech projects required more localized decision-making. SAFE's complexity slowed progress in smaller-scale deployments.

Outcome: SAFE was too cumbersome for Agritech's needs, highlighting the importance of flexibility in decentralized operations.

Alternative Selection: The team switched to the RACI Matrix, which provided clarity in assigning roles and responsibilities across regional and central teams. This approach enabled better coordination in deploying solutions like IoT-based soil monitoring systems and predictive analytics for crop yields.

To monitor and refine its strategy, the Agritech Business Unit initially relied on the Balanced Scorecard (Expanded), as used in the Healthcare Business Unit.

- ◆ **Balanced Scorecard (Expanded):** While it offered a comprehensive view of performance metrics, the integration of ESG metrics and financial indicators created unnecessary complexity for the Business Unit's relatively nascent initiatives.

Outcome: The framework's complexity diluted its effectiveness for real-time monitoring and actionable decision-making.

Alternative Selection: The team adopted the TOWS Matrix, which allowed for agile prioritization of actions by linking threats and opportunities to internal strengths and weaknesses. This simpler approach was more effective in addressing immediate challenges like weather unpredictability and fluctuating market demands.

The Agritech Business Unit demonstrated resilience and adaptability in refining its framework selection. The CAGE Framework provided actionable insights into regional differences, helping tailor solutions to local markets. The Ansoff Matrix and JTBD Framework combined to balance internal capabilities with external needs, while Hoshin Kanri ensured strategic goals were effectively operationalized. The RACI Matrix improved coordination, particularly in decentralized opera-

tions, and the TOWS Matrix streamlined monitoring and refinement processes.

The initial over-reliance on frameworks like PESTEL, Blue Ocean Strategy, and SAFE, while effective in other Business Units, highlighted the need for more localized and simpler tools in the Agritech sector. Early pilot testing of these frameworks could have identified their limitations sooner. The complexity of the Balanced Scorecard (Expanded) proved unnecessary at the Business Unit’s current maturity level, suggesting that simpler monitoring tools should have been prioritized from the outset. Additionally, better training on applying frameworks like the Three Horizons Framework could have improved its usability for balancing innovation and foundational needs.

By learning from these challenges and adapting its approach, the Agritech Business Unit successfully [RR1] refined its strategic process to meet the unique demands of its industry. This case underscores the importance of selecting frameworks that align with both sector-specific and regional dynamics while remaining flexible enough to adapt to evolving conditions. Table 2 outlines the process steps involved in creating a strategy, categorized by their focus areas and the key frameworks used at each stage.

Thus, the strategic framework selection and application process across the Business Units of Intelias Digital Segment — Travel, Healthcare, iGaming, High-Tech, and Agritech — illustrated the challenges and opportunities inherent in aligning diverse operational needs with sector-specific dynamics.

Each Business Unit’s journey underscored the importance of tailoring strategic tools to unique contexts rather than replicating successes from unrelated domains.

Framework adaptability emerged as a critical theme. Tools such as PESTEL Analysis, Balanced Scorecard, and Blue Ocean Strategy proved highly effective in certain cases but fell short when applied in sectors with different requirements. For instance, while PESTEL provided valuable macro-level insights for the Travel Business Unit, its application in Agritech was less impactful due to the latter’s need for granular, region-specific data. Similarly, the Balanced Scorecard’s complexity proved unsuitable for Agritech’s nascent initiatives but was highly effective in the Healthcare Business Unit, where integrating ESG considerations was a strategic priority.

Success was often determined by the degree to which frameworks addressed the specific needs of each industry. The Dynamic Capabilities Framework worked exceptionally well in the High-Tech Business Unit, where rapid technological changes necessitated constant adaptation. Conversely, the CAGE Framework was a better fit for Agritech, where understanding regional agricultural practices was critical. This distinction demonstrated that industries characterized by rapid innovation cycles or significant regional diversity benefit from tools that emphasize flexibility and customization.

Another key lesson was the importance of piloting and testing frameworks before full-scale

Table 2. Mapping to the Strategy Creation Process

Process Step	Category	Key Frameworks
Step 1: Understand Context	Environmental Analysis	PESTEL, SWOT, Porter’s Five Forces, CAGE, Scenario Planning
Step 2: Generate Options	Strategic Options	Ansoff Matrix, BCG Matrix, Blue Ocean Strategy, VRIO
Step 3: Design the Strategy	Strategy Design	McKinsey 7S, Balanced Scorecard, Three Horizons, Playing to Win
Step 4: Execute the Strategy	Implementation	RACI, OKRs, SAFE, Hoshin Kanri, Lean Startup
Step 5: Monitor and Refine	Monitoring & Refinement	Balanced Scorecard (Expanded), Emergent Strategy, Dynamic Capabilities

adoption. The initial reliance on tools proved in other Business Units, such as the iGaming Business Unit's use of PESTEL Analysis and SAFE Framework, often yielded suboptimal outcomes due to differences in market dynamics. However, Business Units that pivoted quickly to alternative frameworks, such as the adoption of the Jobs-to-be-Done Framework in iGaming or the TOWS Matrix in Agritech, achieved more relevant and actionable results. This iterative approach highlighted the value of adaptability in framework selection.

The combination of multiple frameworks often produced superior results compared to reliance on a single tool. For example, the Travel Business Unit successfully paired PESTEL Analysis with Porter's Five Forces to gain both macro and competitive insights, while the Healthcare Business Unit effectively integrated the Core Competence Framework with the Jobs-to-be-Done Framework to align internal strengths with customer needs. These cases illustrated the advantage of leveraging complementary perspectives to create a more comprehensive strategic view.

However, rigid frameworks like Hoshin Kanri struggled in more dynamic industries, such as iGaming, where rapid decision-making and agility were crucial. This highlighted the importance of selecting tools that align not only with strategic goals but also with the operational realities of the Business Unit.

During the monitoring and refinement stage, frameworks such as Emergent Strategy and the Matrix approach have been proved more effective in dynamic environments, enabling Business Units to adapt rapidly to changing conditions. By contrast, the Expanded Balanced Scorecard has been proved more appropriate for Business Units such as Healthcare, where well-established processes and long-term stability supported the use of comprehensive performance metrics.

The case studies have demonstrated that strategic frameworks should be selected according to the specific characteristics of each Business Unit, including its industry, operational structure, and strategic maturity. The incremental implementation of more sophisticated frameworks, such as

the Expanded Balanced Scorecard and Blue Ocean Strategy, can prevent organizations from overwhelming their teams while facilitating their gradual integration. The successful application of advanced frameworks, including the Three Horizons Framework and Scenario Planning, also requires appropriate training and expertise because these approaches rely heavily on long-term strategic foresight. Agile frameworks, such as the SAFe Framework and Lean Startup Methodology, proved particularly effective in innovation-driven industries but required organizational readiness, an adaptive culture, and flexible workflows to achieve their full potential.

Overall, the strategic development processes across Intellias' Business Units have revealed both successful practices and implementation challenges. Business Units that promptly adapted their framework selection and aligned strategic tools with their operational requirements have achieved greater strategic clarity and more effective execution. For example, Agritech's transition to the CAGE Framework and Healthcare's adoption of the Jobs-to-be-Done Framework have demonstrated successful alignment between strategic tools and business needs. Conversely, delays in recognizing misaligned frameworks hindered early implementation, highlighting the importance of pilot testing and fostering an organizational culture that supports adaptability.

This comparative analysis has shown that successful strategy development in an M-form (multi-divisional) organization requires a context-sensitive approach to framework selection. It has confirmed that prioritizing organizational context, strategic agility, and knowledge sharing across Business Units is essential for aligning individual Business Unit strategies with overall corporate objectives. These findings have provided practical guidance for organizations operating in similarly complex environments and have offered a roadmap for improving strategic alignment and execution across diverse industries.

Future research may focus on three directions to further advance the application of strategic fra-

meworks. First, greater attention should be paid to the adaptability and hybridization of strategic frameworks, particularly in dynamic industries such as iGaming and High-Tech. This includes investigating how real-time data and predictive analytics can be incorporated into strategic tools to improve their responsiveness to rapidly changing conditions. Second, further research is needed to examine the influence of organizational culture and structure, particularly within M-form organizations, on the successful adoption of strategic frameworks. A better understanding of how strategic tools can be aligned with organizational characteristics while overcoming resistance to change would facilitate more effective implementation. Third, future studies may investigate how

sustainability and environmental, social, and governance (ESG) considerations can be systematically integrated into strategic frameworks, particularly in industries such as Agritech and Healthcare, where these issues are becoming increasingly important. Such research would contribute to the development of strategic frameworks that are more practical, adaptable, and responsive to evolving industry requirements.

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ТЕОРЕТИЧНІ ТА ПРАКТИЧНІ АСПЕКТИ ВИБОРУ ТА АДАПТАЦІЇ СТРАТЕГІЧНИХ ФРЕЙМВОРКІВ

Вступ. Організації, які функціонують у динамічних галузях, зіштовхуються з труднощами під час вибору та адаптації стратегічних фреймворків, що відповідають їхнім операційним реаліям.

Проблематика. Відсутність структурованих підходів до інтеграції фреймворків призводить до невідповідності стратегічного курсу, що негативно впливає на довгострокову результативність.

Мета. Демонстрація можливостей оптимізації процесу розробки стратегії шляхом адаптивного підходу до вибору фреймворків відповідно до специфіки галузі.

Матеріали й методи. Використано кейси компанії *Intellias* — глобального аутсорсера програмного забезпечення, з аналізом стратегічних підходів п'яти незалежних бізнес-одиниць. Застосовано методи порівняльного аналізу, оцінювання стратегічних фреймворків та аналізу ефективності впроваджених моделей.

Результати. На основі кейсів висвітлено як успішні практики, так і обмеження різних стратегічних моделей у межах окремих бізнес-одиниць. Дослідження засвідчило, що окремі фреймворки забезпечують адаптивність в умовах швидких змін. Водночас, інші можуть виявитися неефективними у разі невідповідності операційній структурі. Отримані результати підкреслюють доцільність гібридного підходу, який передбачає поєднання кількох інструментів задля підвищення стратегічної чіткості та результативності реалізації.

Висновки. Кейс-стаді демонструють, що вибір стратегічного фреймворку має бути контекстно зумовленим — з урахуванням динаміки галузі та викликів реалізації. Компаніям варто застосовувати ітеративний підхід, зокрема, пілотне тестування та обмін досвідом між бізнес-одиницями для вдосконалення релевантності фреймворків. Дослідження пропонує практичні інсайти для фахівців, які прагнуть посилити стратегічне планування в умовах складних організаційних структур, роблячи внесок у ширшу дискусію щодо адаптивного стратегічного розвитку.

Ключові слова: аналіз середовища, реалізація стратегії, стратегічний дизайн, стратегічні опції, організація з М-структурою.