Outcome-Driven Planning: How Global Enterprises Can Align Business Plans With Strategy

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Most leaders agree that strategy should guide the annual plan, but in practice the opposite often happens. Somewhere between the thousands of inputs, countless alignment meetings, and the pressure to “get the numbers right,” strategy quietly loses its seat at the table.

You can sense it when it happens. You open a planning deck, fifteen pages in, and realize you’re knee-deep in a level of operational detail that no executive discussion ever needed. At that point, you’re no longer talking strategy. You’re forecasting operational requirements.

Throughout my nearly two decades in the energy industry, I’ve had numerous opportunities to lead multi-million-dollar financial planning and transformation work, and I’ve observed something consistent: **when a strategic plan becomes a detailed operational forecast, strategy stops leading**.

And if you’ve ever been in a planning cycle where every conversation starts with a spreadsheet instead of the strategy, you’ll know the exact feeling I’m describing.

This article is for leaders and organizations that are stuck in that loop. Not because they lack intelligence or discipline, but because legacy processes have grown so heavy that they overshadow the very reason corporate planning exists: to make meaningful, strategic choices about where the business is heading.

Before sharing the framework I used to break this cycle, it’s worth explaining how easily companies fall into this trap.

When Planning Becomes a Maze Instead of a Guide

Large enterprises love detail. It makes leaders feel informed. It makes teams feel safer. But when every forecast becomes an exercise in proving accuracy instead of sharpening direction, even experienced managers find themselves navigating a maze of data with no clear exit.

And it's not a small maze. In energy markets, you deal with unpredictable demand swings, volatility driven by geopolitics, supply disruptions, regulatory shifts, and the multi-year impacts of the energy transition. Leaders know they can't predict all this, yet planning teams still attempt to.

That tension often creates the perfect storm: detailed inputs, conflicting assumptions, frantic iterations, and very little time left to ask the most important question:

"What strategic outcome are we actually trying to achieve?"

It's amazing how rarely that question gets asked in the middle of a busy planning cycle. The good news is that breaking this pattern doesn't require heroics (well, maybe a little bit). It requires clarity, and a shift in how we think about planning altogether.

Five Principles to Realign Planning With Strategy

These principles didn't come from theory. They came from trial, error, and eventually a redesign of how an entire region planned its business. None of them required new systems. They required a change in mindset.

1. Let Strategy Lead, Not Follow

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This should be obvious, but in practice it rarely is. In many companies, the annual plan starts with a spreadsheet, not with the strategy. Teams build forecasts based on last year's details, and only later ask how the results align with long-term ambition.

It should be the reverse:
Strategy → Mid-term direction → Annual plan → Operational execution

When the sequence is reversed, the annual plan becomes an output of operational readiness instead of a tool for strategic focus.

A senior VP once said to me, "If I need 20 backup pages just to explain the choices we summarized on the main slide, we're wasting everyone's time." And she was right.

2. Separate Strategic Planning From Operational Planning

This is a common pitfall. Businesses use the annual plan to solve too many different needs: the strategic plan, the financial plan, and the operational plan. And because they try to serve all three, none of them is effective.

Operational plans are essential: terminals need to know volumes, logistics need lead times, sales teams need guidance. But that level of detail is not necessary to set the strategic direction for the year to come.

But the moment you combine the strategic and operational plan, strategic conversations die under the weight of operational "what if" scenarios.

One of the most liberating decisions we made was to draw a clean line:

Strategic planning looks at direction. Operational planning looks at execution.

They inform each other, but they are not the same.

3. Remove everything that doesn't move the strategic direction

If there is one principle I wish more planning organizations internalized, it is that most details don't matter for strategic decisions, and not everything can reliably be forecast.

Some powerful examples from the energy industry and transportation sector:

- The COVID-driven collapse in jet fuel demand, and long-haul air travel
- The unprecedented gas price surge in Europe following the start of the Ukraine crisis
- Structural declines in European fuels due to the ongoing energy transition

None of these were forecastable with precision. Yet organizations still spend significant time debating decimal-point accuracy for data that will be irrelevant to the moment reality shifts.

A better approach?

Start with credible macro trends, then focus on the key strategic levers that can truly change the future direction and align it with the strategic longer-term vision. Once we adopted this, we were able to let go of the unnecessary details and focus on meaningful choices instead.

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4. Challenge the Status Quo, Especially When It Feels "Normal"

Every process can feel rational when you're inside it.

But during my time leading the planning cycle for the Energy products business of a major Oil and Gas corporation for Europe, Africa, and the Middle East, I learned that "we've always done it this way" is usually a sign that nobody remembers why it was done that way in the first place.

When I first arrived, I was shown planning files so large they needed minutes to open, and even scrolling felt like wading through wet concrete. One wrong keystroke and the workbook broke, and any work not saved was lost. My team, whilst frustrated, had simply accepted that a planning assignment meant 10–12-hour days during peak time and that was 'just how things worked'. And that's exactly why I challenged it.

I remember one afternoon when two team members were debating whether a 0.2 kbd (thousand barrels per day) adjustment should be included – even though it changed nothing. That was the moment it became even clearer how much the process was driving us, not the other way around. One of the most impactful questions I asked was also a simple one: **"Is this complexity adding value, or hiding it?"**

Many times, the answer was the latter.

5. Lead the Human Side of Transformation – or the Process Will Win

In any redesign, the people challenge should not be overlooked.

You need two things:

- **Management of Change**: the mechanics of implementing new processes and ensuring it is well understood and executed
- **Change Management**: the hearts-and-minds work that determines whether the process achieves lasting adoption

In the energy business, I've seen great ideas die quietly because the organization wasn't brought along. When a planning redesign changes rhythms, removes long-standing tasks, or challenges deeply held beliefs, leaders must make the "why" crystal clear.

In our case, the breakthrough came when people realized simplification wasn't about doing less, it was about freeing them to spend their valuable time on work that actually mattered.

A Real Example: How Simplifying a Multi-Region Planning Cycle Transformed Strategic Dialogue

To make this concrete, let me share what happened during the 2023 planning cycle for a regional portfolio in Europe, Africa and the Middle East covering eight refineries, more than thirty terminals, and a significant retail and wholesale network. At the time I led the FP&A organization responsible for developing that plan.

What We Inherited: A Planning System at Its Breaking Point

Planning required more than **300,000 manual inputs** (not a typo) across product grades, terminals, transportation modes, and commercial structures. The files used to compile a region-wide plan for inclusion in the global plan were so calculation-heavy that formulas broke, files took minutes to load, and errors made the output unpredictable. Many hours were lost on files that crashed before they could be saved, and more on creating intermediate files used to upload summaries into the global planning consolidation system. At one point a team member joked that our “Friday night ritual” was fixing whatever broke in the spreadsheets during the day.

But beyond technical fragility, there was a deeper problem: none of this detail was needed to support strategic decisions. And even worse, a second operational planning cycle in October repeated large parts of the May process, because operational negotiations required a fresh data set.

The Moment Everything Shifted

When I was introduced to this way of working and producing the plan, my immediate reaction was to question why we were doing this. I asked a blunt question: “Has anyone used this level of detail effectively in an executive meeting to steward our plan in the past three years?”

The room went quiet. That was the moment the team came along with the notion that we needed a different approach. And this is where the real redesign began.

What We Changed

We rebuilt the planning approach from the ground up:

- Introduced a simplified product hierarchy, focusing on the key products (e.g. diesel, gasoline) in major markets
- Macro trend adjustments in sales volumes and pricing, based on market data and our own annual energy market outlook

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- Shifted focus to material strategic levers only (e.g. anything under 1 kbd was ignored)
- A commitment to preserve flexibility for operational planning later, without contaminating the strategic cycle

The output was transformed from the spreadsheet empire with a labyrinth of tabs, into a simple grid by country and sales channel.

And we made one additional disruptive, transformational change: the global planning consolidation system required a more granular input per product to calculate the summary, without this data ever being used anywhere. So, I proposed simplifying the input as much as possible: the entire regional sales volume on one single product. I led the alignment with our global planning partners, which required several rounds of discussion and senior level reviews, because no one had ever proposed something that simple. But armed with evidence, and a pragmatic fallback, it was approved and later adopted globally.

The Results Spoke for Themselves

- **99% fewer manual inputs** (300,000 to ~1,000)
- **More than 50 full workdays freed up** across sales and FP&A
- **A plan that executives could articulate and use to steward our strategy to execution**
- **Faster decisions, clearer alignment, and better discussions**
- **A global best practice emerging from a regional fix**

For the first time in years, conversations shifted from “It is very difficult to understand why we are not meeting our plan commitments” to “We understand what drives the difference and have actionable insight to address it.”

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That change alone made the entire effort worthwhile.

Why This Matters for Every Large Organization

No matter the industry, planning tends to accumulate complexity over time. New asks are added. More detail is layered on. Processes stretch to accommodate every scenario. And rarely, things are dropped because they are probably not needed anymore.

Complexity rarely builds capability.

Outcome-driven planning is an antidote to this drift. It restores strategic clarity, accelerates alignment, and liberates teams from work that consumes time but contributes little. In a volatile world, that clarity becomes a competitive advantage.

For me, the biggest lesson from this transformation was simple:

When leaders focus on what truly moves the business, strategy finally gets the space it needs to lead.

And when you simplify planning, something else happens too: people rediscover the meaning in their work. They stop managing files and start managing the business. In my experience, that shift is where real performance begins.

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Werner van Rossum is a global finance transformation leader with more than 17 years of experience at ExxonMobil, where he has led some of the company's most complex planning, reporting, and analytics transformations. Renowned for his direct, clarity-driven leadership style, he specializes in transforming complicated financial processes and strategies into streamlined, insight-ready systems that support faster decisions and stronger strategic execution. He is widely recognized for transforming planning and finance organizations that long accepted complexity as inevitable.

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