

# Towards a Model for the Full Spectrum of Strategy Management Using the ADEM Model

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## Abstract

In today's hyper-competitive markets, some strategy management frameworks are not designed to develop competitive strategic plans in the new market, and many fail to have the adequate process to meet the customer's desired expectations. Not all strategies are made equally and not all strategy management frameworks offer busy leaders' high-level control and a line of sight in the full spectrum of the strategy management process. The ADEM (i.e., analyze, develop, execute, and manage) model offers the full spectrum process for strategy management using a modular approach that can be customized by leaders in organizations. The ADEM model provides structure, guidance, and direction for the experienced and novice leader of large companies who seek to develop competitive strategic plans in the new market. The purpose of this research is to introduce and evaluate the effectiveness of the ADEM model compared to other strategy management methods. This is the first study that quantitatively reports on the evaluation of the ADEM model as a viable strategy management solution. Twenty-one leaders in different industries participated and answered 25 survey questions by evaluating the effectiveness of using the ADEM model. According to the study participants, the findings analyzed using the Wilcoxon test indicate that the ADEM model is significantly more effective than other methods. Specifically, the ADEM model demonstrated a 50.8% greater effectiveness in the analysis, development, implementation, and management of organizational strategic plans.

## Keywords

Strategy Management, Model, ADEM (Wallace) Model, Methods, Frameworks, Competitive Advantage, Sustained Competitive Advantage, Phases, Drivers, Elements

## 1. Introduction

In today's hyper-competitive markets, some strategy management methodologies and frameworks fail to meet their customer's expectations. The failure is not only attributed to the strategy management method and/or framework, but also the leaders who are leading the strategy execution (Risinger, 2018). Less than 30% of thirty leaders in firms created incentive plans to help engage their employees in the strategy effort (Kaplan & Norton, 2008). Strategy management is not the same as strategic planning in which a group of executives attend a retreat and create a strategic vision and a set of goals for an organization. Yet some leaders still approach strategy management as a strategic planning process which concludes in the development of a strategic plan. Successful strategy executions begin with the notion that strategy management is everybody's job and the process of strategy management consists of the full spectrum of strategy management (Keshavarznia & Wallace, 2023; Kaplan & Norton, 2008). Strategy management is a process of creating a strategic-focused organization which consists of 1) translate the strategy into operational terms, 2) align the organization to the strategy, 3) make strategy everyone's everyday job, 4) make strategy a continual process, and 5) mobilize change through strong, effective leadership (Kaplan & Norton, 2004; Kaplan & Norton, 2006). Although there have been proven methods over time to use when developing and implementing a strategic plan, some leaders still fail in mobilizing the people in their firm to help to engage and mobilize their employees and to advance the organization's strategic priorities.

The failure in leaders' ability to effectively develop and execute strategic plans is not a new phenomenon. Alfred North Whitehead (1925) wrote that some leaders have "the fallacy of misplaced concreteness". They develop strategic plans without input from others in their organization then expect their managers, staff, and employees to haphazardly implement it (Risinger, 2018). These leaders have failed in mismanaging strategic planning for so long that their failures have been labeled the acronym SPOTS which means *strategic plans on the shelf*. Leaders of large firms devote time to developing strategic plans and refer to them ever so often (Myrna, 2012). They attend strategic planning retreats led by external consultants who charge absorbent fees to assist in developing these competitive robust strategic plans that later gather dust on a shelf in an executive office. The failure of the strategic management process has a lot to do with leaders' inability to build out action plans for implementing the strategic plan. According to Kaplan and Norton (2001), leaders must know how to translate strategic priorities throughout an organization and to make strategy everyone's job. Actioning planning in strategy management consists of creating strategic objectives that aligns with the strategic vision, aligning the budget, the business units, the people, the information systems, and the organization capital to the strategic plan, creating a communication plan that consistently message the progress, and incentivizing the strategic plan (Kaplan & Norton, 2008). Failures in strategic planning can be reduced if leaders challenge their existing knowledge of strategic planning and increase their

awareness, knowledge, and application of advanced strategic planning methodologies (strategies on the shelf).

Identifying solutions to increase the success of strategic management is a growing topic amongst academicians. In a corporate strategy literature search about strategy management, there were more than 5,460,000 responsive articles returned about the topic of strategy management and this list continues to grow as new market dynamics create new demand for strategic plannings. The foremost strategy management frameworks that came up in the search are blue ocean strategies (BOS), red ocean strategies (ROS), platform strategies (PS), and the BSC. Blue ocean strategies (BOS) is a non-disruptive approach that seeks to give a firm uncontested territorial advantage in the marketplace (Kim & Mauborgne, 2014). BOS is one of the newer strategy methodologies that has had a huge impact in the field. BOS has unique tools such as the strategy canvas, visual exploring, the four action frameworks, the buyer experiences, and others (Kim & Mauborgne, 2014). These tools are superior in their design and alignment to the elements of BOS. BOS takes an innovative approach to building a strategic plan in today's marketplace. Dr. Michael Porter's Competitive Strategies (CS) has been the heartbeat of industrial strategic planning for more than 30 years. Coined the term red ocean strategies (ROS) by its counterpart BOS, it consists of frameworks that are designed to identify strategic ways to compete within fierce competition. Porter's strategic frameworks have been the most sought frameworks and the most acknowledged in business schoolbooks. Porter's strategy management tools are the five forces, value chain analysis, and generic strategies (Porter, 1997). Porter's strategy frameworks seek to position firms in the most competitive fortress while mitigating the forces of competitors to remain competitive in the marketplace. Platform strategies (PS) is a new strategy management phenomenon that disrupts the normalcy of strategy management. The framework is designed to leverage existing resources in the marketplace by allowing independent contractors or participants to benefit from the presence of others (Parker & Van Alstyne, 2014). The core of all PS such as Uber, Facebook, Air BnB, Netflix, Instagram is a technology application that controls all transactions. The PA framework is innovative in design and practice, and it has proven through scalability and new entry impact to be one of the most competitive strategy management frameworks to enter the marketplace. The BSC is one of the most competitive strategy management methods today. It's designed to consider the full spectrum of strategy management, but the applicability of the method is somewhat complex and vast. The tenet of the method entertains the idea of fostering a strategy-focused organization (Kaplan & Norton, 2001). The BSC strengthens the process of strategy management by structuring each phase of the full spectrum of the process. The BSC uses effective and unique tools such as the strategy map, the strategic change agenda to support firms in their strategy management effort. These key principles are linear in application but there is not a specific roadmap for their application. Strategy management needs a guided linear approach to strategy execution that considers the

full spectrum of the process.

## 2. Statement of the Problem

Most strategy management frameworks are effective in guiding leaders throughout the process of developing a strategic plan, but the problem is that they fall short in offering a process for managing the full spectrum of strategy management. The ADEM model offers a guided linear full spectrum approach to strategy management using a modular application that can be customized by leaders in organizations.

The purpose of the research study is to introduce the ADEM model to the academic and scientific community at the global level and to prove the model's effectiveness. The research question is, how effective is the ADEM model full spectrum process for strategy management?

## 3. Background Research

In today's hyper-competitive markets, some strategy management frameworks are not designed to develop competitive strategic plans in the new market, and many fail to have the adequate dynamic system to meet the customer's desired expectations and to offer solutions for managing the full spectrum of strategy management. The ADEM model offers the full spectrum of strategy management using a modular and stratified approach to increase the success of a firm's strategy implementation. The word ADEM is an acronym that stands for analyze, develop, execute, and manage.

This research study seeks to rate the effectiveness of the ADEM model in the practical application of the full spectrum of strategy management. The goal is to better understand the effectiveness of the four phases and 21 drivers. The twenty-one drivers of the ADEM model are elements identified in the Balanced Scorecard (BSC) strategy management methodology. The BSC elements were sequentially organized in a way to increase their impact on a firm's approach in developing and executing a strategic plan.

While the article does rely heavily on existing frameworks such as the BSC, it is important to note that the goal of the study was not to introduce new theoretical constructs but to offer a practical framework that helps leaders effectively analyze markets, develop strategic plans, execute them, and manage their implementation. The ADEM model responds to a common failure in strategy management. Strategic plans that are developed but remain unexecuted due to the absence of a clear, actionable process. The ADEM model offers a practical, efficient, and linear approach for strategy execution, addressing this critical gap in the field.

Dr. Mario Wallace, the author of the ADEM model, contends that the possession and knowledge of a strategy management road map provides an organization with the opportunity to create a sustainable competitive advantage over its competitors. The ADEM model was designed to enhance or to increase the success of

implementing the BSC.

Since the development of the ADEM model, Dr. Wallace has used the model to lead more than 75 strategy management projects in large organizations across more than five industries consisting of 100 departments with different capacities. Therefore, for this research study, the researchers selected 79.51 (80) departments as a statistical sample using Cochran's formula. In these departments, the researchers identified twenty-five people with the desired characteristics for the research study. The researchers sent them the questionnaire.

The research study evaluated the responses of participants in professional settings, be it higher education, health care, or consulting, to help assess the performance of the phases and drivers of the ADEM model of strategy management. Some participants had prepared a strategic plan using the ADEM model, and others were familiar with the model and/or had studied its application.

#### 4. Literature and Theoretical Foundations of Research

The aim of this study seeks to rate the effectiveness of the ADEM model in the practical application of a full spectrum of strategy management. To review the literature for this research, it is important to review seminal and current research related to strategy management frameworks and specifically the BSC. It is also important that the context of the research compares the ADEM model to other practical strategy management frameworks.

There are multiple strategic planning theories, methodologies, and frameworks that leaders use to help align and mobilize employees to a firm's strategy to advance the strategy and create a cadence for evaluating the strategy. There are many competitive frameworks that have rigid yet flexible processes for advancing a firm's strategic plan, but a few of the most competitive ones are the knowledge management theory (KMT), the resource-based theory (RBT), dynamic capabilities, BOS, CS, PS, and the BSC.

The KMT is a strategy method that assesses the firm's ability to acquire and develop its intangible assets such as people capabilities, problem solving, routines, and access to information (Grant, 1996). Knowledge is an intangible asset that has the capability to build a competitive advantage in a firm. Intangible assets are those that are not visible like tangible assets such as equipment, people, buildings, etc. Grant (1996) wrote that business intelligence (BI) comes from the people in a firm. BI is created by reusing stored and shared knowledge in a firm (Kaplan & Norton, 2004; Jabar, Sidi, & Selamat, 2010). Grant (1996) wrote that KBT creates the economic rents of information-based production in a firm (Grant, 1996). Competitive advantage of a firm comes from the development and acquisition of its tacit and explicit knowledge (Yang, Lee, & Cheng, 2016). Grant (1996) wrote that a firm's knowledge is a non-monetary intangible asset such as problem-solving capabilities, people's capabilities, coordination of competence, and routines. The ADEM model incorporates elements of KMT in all four phases of strategy management. Not only do leaders have to make critical tradeoffs when developing strategic priorities for a

firm, but they also must effectively manage the plan throughout its life cycle. The ADEM model, however, considers the knowledge loop in a firm and structures the phases in the model to ensure that knowledge is both evaluated and passed on per phase to leverage decision making along the way. In the analysis phase of the ADEM model, executive leaders evaluate market data and identify high-level strategic opportunities to guide a firm. The information is shared with middle managers who provide feedback and suggestions based on their knowledge of the firm's operations. The same information is shared with the frontline employees who offer feedback related to their day-to-day activities in a firm.

Resource-based theory is an extension of the value chain analysis. The VSA helps firms evaluate the activities that transform the inputs and outputs (Porter, 1997). Barney sought to extend this thinking by conducting research to determine how internal resources can create a sustained competitive advantage for a firm. According to Dr. Jay Barney (2001), intangible assets are a source of a firm sustained competitive advantage. A sustained competitive advantage is measured by the inability of a firm's competition to duplicate a firm's strategic value over a period. Employees are a source of a sustained competitive advantage in a firm when they are rare, difficult to imitate, and non-substitutable resources (Barney, 2001; Grant, 1996; Teece, 2000). To create a sustained competitive advantage, leaders in firms must know strategies to retain rare leaders and prevent them from becoming mobile (Barney, 1991; Jabar, Sidi, & Selamat, 2010). Leaders must be valuable, rare, immobile, and possess value creating opportunities for a firm (Abusweilem & Abualoush, 2019). The RBT considers internal assets as the main source of a firm's sustained competitive advantage. The ADEM model, however, is designed to take on this same logic of evaluating intangible assets, specifically human capital, information capital, and organization capital in a firm. Incorporates elements of the RBT as it relates to developing human capital in a firm. Human capital is a sub driver of strategic alignment in the model which is the second driver of the execution phase. Human capital considers the leaders, the staff, and the employees in a firm as it relates to their readiness to advance a firm's strategic plan. Their readiness is determined by assessing their knowledge, skills, and attributes related to their ability to advance certain strategic priorities in a firm's strategic plan. The goal of readiness is to ensure that the people in a firm have the dynamic capabilities to advance the strategic plan.

Dynamic capabilities (DC) is a strategic planning method that focuses on the ability of leaders in a firm to integrate internal and external resources, build value in them, and reconfigure them to address the dynamic external market. DC is the art and science of developing existing and acquired human capital (Teece, 2000). Teece (2000) wrote that the strategic diversification of internal resources leads to employee training, education, certifications, and advancements. Barney (2001) expressed that a firm's best investment is in its human capital. DC is an extension of the RBT in which Dr. David Teece and colleagues conduct research to support leaders in their quest to achieve a sustained com-

petitive advantage in today's dynamic market (Breznik & Lahovnik, 2014; Shuen, Feiler, & Teece, 2014). Capabilities is an extension of Barney's RBT although the theories present clear distinctions (Teece, 2000). The elements of DC are (1) sensing, (2) seizing, and (3) reconfiguring (Breznik & Lahovnik, 2014; Teece, 2000). According to Dr. Teece, leaders must understand sensing, which is the ability to analyze the internal and external environments and take advantage of existing opportunities. DC considers internal resources, paths, and processes (Barney, 1991; Teece, 2000). Teece's framework supports the idea that a firm's competitive advantage is determined by its difficult-to-replicate internal resources. Bansal and DesJardine (2014) explained that owners of firms who leverage their dynamic capabilities know how to create long-term value for their firm. The ADEM model, however, is designed to peel back the layers of dynamic capabilities by addressing the sensing, seizing, and reconfiguration information throughout the full spectrum of strategy management. In the analysis phase of the ADEM model, leaders are challenged to make sense of external and internal data and propose strategic implications to share with middle managers in a form. The middle managers react and provide feedback on the proposed strategic implications. The frontline staff and employees react and provide feedback to the middle managers' response to the proposed strategic implication before a strategic plan is ever developed. The logic of sensing, seizing, and reconfiguration information is revisited in the development phases when creating a strategic vision and a strategy map; in the execution phase when identifying strategic risk in a plan, evaluating human capital, and mitigating the barriers to change; and in the management phase when interpreting data in the review meetings which could potentially lead to a shift in strategic direction. The ADEM model is designed to repeatedly examine data to ensure that leaders in firms have access to information to remain relevant in the marketplace.

Blue ocean strategies BOS is a strategy management method that aims to help leaders in firms create non-disruptive and new uncontested market spaces. BOS is designed to help leaders create strategies to make their competition irrelevant in the marketplace (Kim & Mauborgne, 2014). BOS consists of a multitude of strategy management associative tools such as the strategy canvas, visual exploring, the four action frameworks, the buyer experiences, and others (Kim & Mauborgne, 2014). The tools are highly effective in carving out a BOS, but they are not designed to align the resources to a strategy, cascade strategy to business units, or evaluate the performance of a strategy. The ADEM model, however, incorporates BOS in the analysis phase and the development phase. In the analysis phase of the ADEM model, leaders of firms can use either BOS external market analysis tools to conduct an environmental scan to gauge their competition and to determine the strategic positioning for a firm. Leaders could use this information to determine the strategic implications for a firm. In the development phase of the ADEM model, leaders of a firm can use the BOS tool to develop their strategic vision and strategic objectives to support the strategic position in the marketplace. The modular and flexible approach to the ADEM model allows for the partnering of existing strategy

management methods to strengthen the desired strategic plan.

Competitive strategy consists of frameworks such as generic strategies, the five forces, and the value chain analysis. These frameworks are attributed to Dr. Michael Porter's doctrine of strategy management. These frameworks are termed red ocean strategies (ROS) by Dr. Porter contemporised Drs. W. Chan Kim and Renée Mauborgne. Dr. Porter's strategic frameworks have stood the test of time and globally benefited many organizations. The five forces framework is designed to help leaders examine the forces of a firm competitive advantage and create strategies to mitigate the forces; Generic strategies is designed to help leaders determine the positioning of their firm the marketplace to create value for their customers and to achieve the desired financial outcomes; and the VCA is designed to help leaders select, develop, and evaluate the internal assets used to transform their inputs and outputs (De Mozota, 1998). The VCA consists of two distinct transformational activities that create value for products: primary and secondary (Simatupang, Piboonrunroj, & Williams, 2017). Porter (1980) stated that a firm's primary activities include inbound logistics, production, outbound logistics, marketing and sales, and services. The secondary activities include firm infrastructure, human resources, technology, and procurement. The ADEM model, however, incorporates all three frameworks in the development of a firm's strategy. For example, leaders of a firm can choose frameworks to use when conducting a market scan such as the five forces or the generic strategies. The goal of the market analysis is to sense the marketplace to determine the best strategic opportunities for a firm. The ADEM model provides flexibility to use both ROS, BOS, and PS tools to examine the marketplace to compete as a firm.

PS is a strategy management method that revolves around the idea of allowing independent contractors to benefit from the presence of others (Parker & Van Alstyne, 2014). PS have produced some of the world's most scalable and competitive firms such as Uber, Facebook, Air BnB, Netflix, and Amazon Prime. All these firms operate using a technology that controls all transactions. PS is designed for the information age as opposed to ROS which was designed for the industrial age. It is designed to align to the behavioral norms and the culture of the information age. The goal of a PS is to help firms offer a cheaper yet high quality value offering without all the internal labor and resources necessary to optimize an entire chain of product activities. The ADEM model, however, incorporates elements of the PS in the development phase of the model. For example, the strategic objective, which is the third driver of the ADEM model can be developed using BOS, ROS, or PS. When developing strategic objectives, leaders have a lot of options of choosing any strategy method for developing their strategic objectives. The ADEM model accommodates a leader's choice in methods for developing his or her strategic objectives. If a leader wants to create a strategy based on creating value for customers without having to employ internal labor, he or she can choose PS as their method for creating their strategic objectives. The ADEM model is designed to chart the path of strategy management for leaders while accommodating a leader's choice in leveraging new or existing tools external to the model.

The BSC is a strategy management performance methodology that uses metrics supported by four perspectives to develop, implement, manage, and evaluate the performance of a firm. The BSC considers the full spectrum of strategy management in its approach to fostering a strategy-focused organization. According to the Harvard Business Review (HBR), the BSC is considered the best strategy management method published by the Harvard Business School in over 25 years. Drs. Kaplan and Norton, the brilliant academicians who authored the BSC, have published many great articles and books that explain the components, layers, and application of the BSC in books entitled *Alignment*, *Strategy Maps*, *Fostering a Strategy Focused Organization*, and *Premium Execution*. The BSC consists of many tools, but the two most impactful tools are the strategy map and the strategic change agenda. The strategy map is a cause-and-effect diagram that consists of strategic objectives that are arranged in manner to evaluate the performance of a strategic plan. The strategic change agenda is designed to communicate the changes in a firm by describing the current and future state of dimensions. The BSC consists of many elements such as the market analysis, the strategic vision, the strategy map, the strategic risk portfolio, cascading, and the governance calendar. These are quite expansive concepts and challenging to apply without a guide. When considering all the published books and articles about the BSC, both novices and practitioners have challenges in identifying a linear path for applying the BSC, which creates challenges for many and opportunities for the ADEM model. The ADEM model organized the elements of the BSC into four phases and twenty-one drivers. The order of the phases and drivers are designed to help both novice and practitioner to effectively apply the method in a linear fashion. The ADEM model organized the elements of the BSC in a linear chronological order to simplify the application.

#### **4.1. The ADEM Model**

The original ADEM model emerged from a leadership institute program for emerging leaders at an academic medical institution. The emerging leaders in the program consisted of leaders from the field of higher education, healthcare, research, and the operations business units. The program included topics such as Emotional Intelligence, Crucial Conversation, Change Leadership, and Strategy Management. The goal of the strategy management program was to teach emerging leaders how to develop, execute, and manage a competitive strategic plan using the BSC. After designing, developing, and facilitating the program for several years, Dr. Mario Wallace began to notice that most of the leaders who had graduated the program failed in their attempts to implement their strategic plans. He also noticed the same patterns with leaders who participated in his program at other institutions. Being curious, he conducted an independent research study where he identified 35 random participants from across industries who were scheduled to participate in his strategy management program and studied them for 18 months. He learned that the leaders possessed the knowledge to develop, execute, and

manage their strategic plans but lacked the skills and attributes to execute them. Most of the emerging leaders in the program conducted a thorough market analysis, conducted effective executive interviews, developed strong goals and objectives, and constructed their BSC. But they did a poor job in implementing and managing their strategic plan over time. Some of the emerging leaders did not even attempt to execute their strategic plan; they placed them on the firm's website where they remained. The pattern that had emerged was that the emerging leaders did not have the practical experience to properly implement and manage their strategic plans. As a result, Dr. Wallace redesigned the strategy management program and built practical applications for the execution and management phases. In concluding his independent research, he identified four phases which consisted of analyze, develop, execute, and manage and 21 drivers that supported them. He designed the acronym to make the phases easily roll off the tongue.

The four phases of the ADEM model are composed of actionable drivers, each with a clear order of application. The model helps leaders apply numbers and metrics (i.e., strategic targets) to ensure performance alignment. This sequence allows for precise execution and minimizes organizational ambiguity in strategic initiatives (**Table 1**, **Table 2**).

**Table 1.** Describes the phases of the ADEM model.

Phase	Initial	Description
Analyze	A	Making rational and strategic decisions by analyzing operational and marketing data, avoiding biases in the data, and choosing the most competitive strategic direction for the organization.
Develop	D	Translating operational and market data into a concrete plan that's adaptive to the market and considers the alignment of human capital, human capabilities, technology, and culture as factors of advancing the mission of an organization.
Execute	E	Effectively communicating the strategic direction while implanting strategy into the culture of the organization via aligning employees to the strategy, the strategy to employee performance, and effectively managing employee resistance.
Manage	M	Setting periodic strategic meetings to discuss strengths, weaknesses, opportunities, and threats and track a company's output and performance against regularly scheduled targets.

*Note.* **Table 1** includes Dr. Mario Wallace's original description of the ADEM model phases.

**Table 2.** Describing the drivers of the ADEM model.

Driver	Description
Analyze Phase Drivers	
Market analysis	The market analysis involves being able to interpret large sums of data to seize market opportunities and determine a direction. To perform these tasks, leaders must analyze market share and outmigration trend data; competitor activities, and anticipated strategies, competitors, and major trends impacting their business.

**Continued**

Executive interviews	Executive interviews are designed to discuss the future direction (strategic horizon) of an organization. The goal of executive interviews is to provide critical insight for developing a strategic plan by soliciting insight and perspective on trends, threats, opportunities, exploring data gaps, etc.
Middle management focus groups	Middle management focus groups are designed to gain buy-in from managers. The purpose of the focus group is to gather information from middle managers in a planned discussion regarding trends, threats, opportunities, and gaps in the existing operations.
Frontline town halls	The frontline town halls are designed for engaging frontline staff and employees although middle management is welcomed. The goal of the town hall session is to collect information to inform frontline employees about the strategic plan, to get their buy-in, and to begin the process of mitigating potential resistance.
Pre-retreat report	The pre-retreat report is designed to help executive leaders identify the competitive strengths and weaknesses of competitors, understand the context of potential strategic implications and the firm's resources, communicate the feedback from the middle management and the frontline staff and employees, and offer strategies for engaging and mobilizing leaders, staff, and employees.
<b>Develop Phase Drivers</b>	
Strategic vision	A vision statement is a concise written statement defining the mid-long term (3 - 5 year) strategy of an organization. The vision is a summary of how the organization wants/intends to be perceived by the world.
Strategic change agenda	The strategic change agenda is designed to identify the desired changes in a firm based on the strategic vision. It communicates the current state of business domains (activities) and their desired future state. A CA articulates the actions that a firm must take to move from its current state to its desired future state. A CA must be socialized with employees across an organization for feedback before developing a strategic plan.
Strategic objectives	Strategic objectives detail your plan for strategy execution by translating high-level ideas into concrete steps for action, reflecting your organization's highest priorities. For example, increase market share, be service oriented, achieve order fulfillment excellence through online process improvement.
Strategy map	The strategy map is a one-page, cause and effect diagram that communicates a company's strategic plan. It consists of the company's name, the company's strategic vision, objectives, and four perspectives: financial, stakeholders, internal process, and talent & technology. It's a one-page matrix that links tangible financial assets to intangible assets (i.e., people, information, and culture).
Measures and targets	Measures are related to objectives and indicate whether you are reaching those objectives. There should be at least one measure for each objective. Targets are related to measures and will convey the level of performance expected for that period. The target is the performance indicator in terms of the level of performance for meeting a strategic objective.
Strategic initiatives	A strategic initiative is an "Intervention Project" that will close the performance gap of an organizational objective. It is a project or program with a definite beginning and end and to which both financial and human resources are allocated.
Balanced scorecard	The BSC is a strategy management system that is used to formulate a strategic plan, to translate a strategic plan into an organization, and to evaluate the performance of a strategic plan.
<b>Execute Phase Drivers</b>	
Strategic risk plan	The strategic risk plan is designed to identify, evaluate, and prioritize risks identified in a strategic plan. The question is however, how much risk is a firm willing to take to achieve its strategic objective? Once leaders identify the strategic risks in a strategic plan, they must create contingency plans to mitigate the risk.

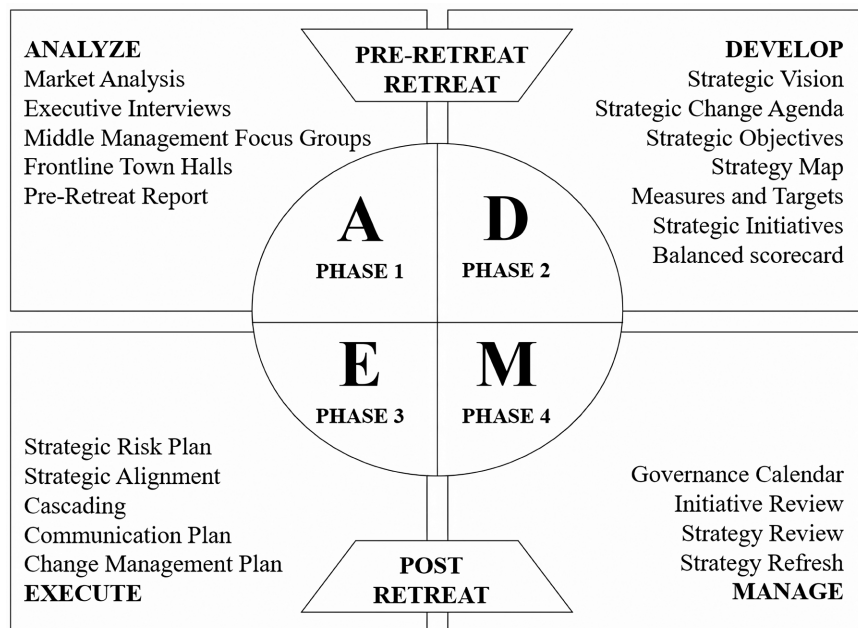
**Continued**

Strategic alignment	Strategic Alignment ensures that the resources, goals, and plans of each operational and support function are aligned to the corporate strategic plans. This requires cascading the strategic agenda throughout the organization and establishing accountability and reporting through a results forum to ensure execution takes place.
Cascading	Cascading is a component of strategic alignment. The purpose of cascading is to gain synergy across business units to create economies of scale. The concept of cascading leverages the corporate portfolio. There are two approaches to cascading: bottom up and top down. Top-down cascading is led by executive leadership. Bottom-up cascading is an autonomous approach that is led by business unit leaders.
Communication plan	The communication plan is designed to consistently inform of the progress of the plan, mitigate potential employee resistance, engage, and inspire internal and external stakeholders. The communication plan is crucial for engaging stakeholders in the strategic management process.
Change plan	The change plan is designed to manage the barriers to change. Mobilizing change is essential in the strategy management process. Change is inevitable in all organizations, and it is impossible without the help of employees. Identifying executive sponsors, creating sponsor roadmaps, training, and developing functional managers, and assessing behaviors of employees in the cycle of change are imperative.
<b>Manage Phase Drivers</b>	
Governance calendar	A governance calendar is designed to ensure that reporting aligns to coordinated dates of a company's strategic plan. The governance calendar gives leaders a line of sight and control of a firm's strategic plan.
Initiative review	The initiative review meeting is an in-depth analysis of the performances of strategic initiatives. The initiative review meeting is usually scheduled monthly.
Strategy review	The strategy review meeting is an in-depth analysis of the performances of strategic objectives and initiatives. Strategy review meetings should be scheduled quarterly and/or semiannually.
Strategy refresh	The strategy refresh meeting is designed for pressure testing the existing company's strategy. New market data and internal data are introduced to leaders who are challenged to make sense of the data in the strategic context of the organization. Activities such as scenario planning and wargaming are used at this event. Changes to the existing strategic plan appear as redline edits in the plan. The strategy refresh meeting must be scheduled annually.

*Note:* **Table 2** was Dr. Mario Wallace's original description of the ADEM model drivers.

Since the inception of the ADEM model, Dr. Wallace has used the model in multiple organizations across industries. Leaders in acute healthcare, community healthcare, and healthcare consulting have all used the ADEM model to develop, execute, and manage their strategic plans. To be specific, more than five healthcare organizations with upwards of 65 business units developed their strategic plan using the ADEM model in healthcare. Leaders in higher education have also used the ADEM model to develop, execute, and manage strategic plans in their organization. Higher education institutions with more than 35 business units have used the ADEM model to develop the institutional strategy, align business unit strategies, and cascade objectives throughout the organization. The ADEM model of strategy management has been used in large organizations and in small organizations in the private sectors.

The ADEM model organizes the elements of the BSC in a timely, logical sequence to reduce cognitive dissidence and make strategy management palatable for all leaders. Strategy management is an exciting yet exhausting process for most leaders especially when the process extends beyond the development of the strategic plan in which leaders are expected to manage the full spectrum of the strategy for multiple years. The BSC considers the full spectrum of strategy management in its approach to strategy execution. The full spectrum considered the scanning the market for threats and opportunities, developing a strategic vision for directing the strategy, structuring a change agenda to highlight the desired changes in an organization, identifying objectives to focus the strategy, populating a strategy maps to as a landing pad to guide the strategy, supporting the objectives with the measures, targets, and initiatives to create the action in the strategy, aligning the organization to a central strategic vision, and managing the strategy accordingly (Keshavarznia & Wallace, 2023; Kaplan & Norton, 2006). All these disparate layers and elements can create cognitive dissidence in leaders and novice strategists. As a result, the ADEM model was created as an intervention to this problem. The ADEM model incorporates all elements of the Balanced Scorecard (BSC) and restructures them to offer leaders a clear line of sight into the strategic management process. This structure fosters both horizontal and vertical synergies across the organization. In addition, the model integrates key principles from BOS, ROS, PS, and the RBT, enhancing its overall effectiveness as a strategy management approach. The ADEM model organizes these integrated components into clearly defined phases and strategic drivers to guide execution. While the strategic drivers play a vital role, a deep understanding of the logic and sequence of the four phases is even more critical to successful implementation.



**Figure 1.** The ADEM model for strategy management. *Note:* Figure 1 is Dr. Mario Wallace's original design of the ADEM model.

**Figure 1** presents the full ADEM (Analyze, Develop, Execute, Manage) Model, illustrating both the four core phases and the strategic drivers associated with each. The model is organized sequentially beginning with Analyze, followed by Develop, Execute, and Manage to provide clarity and ease of application for organizational leaders. This structure offers a step-by-step roadmap for strategy formulation and implementation.

The ADEM model stands out in its practical application and strengthens other strategy management approaches through its structured, step-by-step process. Unlike the BSC, which often requires a deep academic background, spanning eight collegiate texts, numerous research papers, and even certification through Kaplan-Norton's Palladium Bootcamp, the ADEM model demystifies the application of strategic management by presenting a clear, sequenced toolkit. Many leaders understand the need to assess the market before setting strategic goals, but the subsequent application process often becomes unclear. Questions such as when to conduct executive interviews, when to develop a strategy map, or how to perform a risk assessment are rarely addressed sequentially in existing models. The BSC is strong in performance measurement but lacks sequential execution guidance. The RBT is useful internally but neglects external threats. ROS are mostly externally-focused and not execution-oriented. BOS are comprehensive in analysis, but lack practical tools for sequential execution guidance. PS are designed for startups or flat organizations, not suitable for large, complex firms. RBT, ROS, and PS offer valuable insights, they are either too narrowly focused or too complex for broad, practical adoption. The ADEM model integrates the strengths of these approaches while presenting a streamlined and accessible roadmap for strategic execution.

To further strengthen the analysis, the ADEM model's four phases, each consisting of actionable drivers, serve to guide leaders through the application process in a structured and repeatable manner. These numbered steps enhance understanding and execution, particularly for leaders managing complex operations.

The ADEM model inherently reinforces the dynamic capabilities of "sensing," "seizing," and "reconfiguring," as it encourages leaders to continuously scan the external environment, make strategic decisions based on real-time data, and reconfigure internal resources to meet emerging opportunities and threats.

The ADEM model was designed to enhance the order of operations in strategy management by sequentially organizing the elements of the BSC in a logical order while enhancing its execution. The logical sequential order of the ADEM model intends to guide leaders through the process of developing, executing, and managing a strategy plan. The ADEM model visually highlights the full capability of strategy management by identifying all the phases to consider when developing a strategic plan. Whether using artificial intelligence to scan the environment or using consultants, the first mode of operations is conducting an external scan of the market. Without scanning the market, the strategic plan becomes an internal operational activity that seeks not to position the organization to compete in the

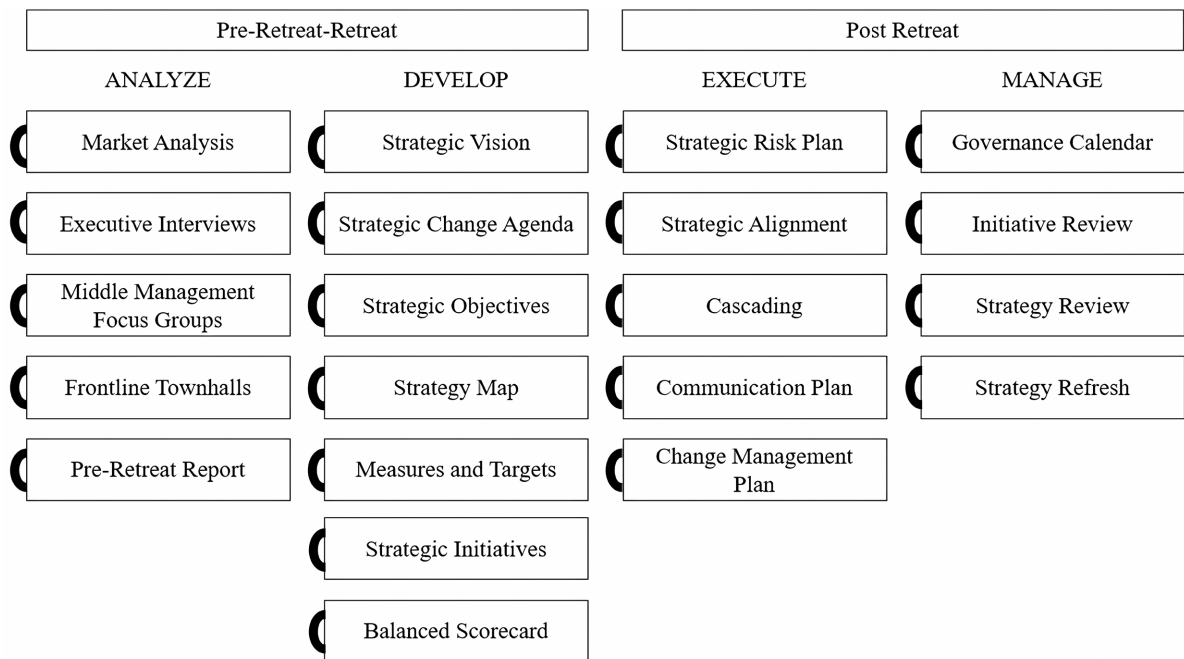
larger market. The second mode of operations is the development of the strategic plan. The first driver in the development phase is strategic vision. The goal of the strategic vision is to provide direction for the organization considering the strategic horizon, bold statement, and niche for the organization. Provided that most strategic plans reside on shelves, the ADEM model places an asterisk on execution. The execution phase in the model identifies six key drivers designed to increase the likelihood and impact of a successful execution. Evaluating strategic risk is the first driver in the execution phase. Implementing a strategic plan without identifying its risk indicators is strategy suicide. Alignment is the second driver of the execution phase. Alignment consists of aligning the resources in an organization to support the strategic plan including the budget, intersection culture and information system with the strategic plan, determining the performance activities that support the strategic plan, and anchoring the people to the strategic plan. Cascading objectives to business units across the organization creates the necessary structural capital. Cascading is either top down or bottom up. The communication plan is the fourth driver in the execution phase. The communication plan aligns the messaging. Leading change is the fifth driver in the execution phase. Leading change consists of creating a change strategy and a change coalition team. The final mode of operation is the management phase that focuses on testing hypotheses within the strategic plan, iterative learning, and managing the strategy accordingly. Although the ADEM model has a linear mode of operations, the model was designed with the utility to meet an organization's requirements.

The utility of the ADEM model creates a sustained competitive advantage for companies across industries. The ADEM model is a collection of evidence-based elements that are arranged into phases to meet the desire of the customer. The model offers a sequential linear construction that can be dismantled and refitted to create the ideal approach to strategy development, execution, and/or management. The model is structured with intersecting modules that are designed to leverage the strengths of each individual component as integral parts of the whole system. Leaders can customize their approach to match the organization's desire. Refer to **Figures 2-5**. The model is stratified into phases and drivers. The phases separate activities into a linked time continuum that is specific to the order of operations. For example, in the execution phases, there are six structured activities that are led by evaluating the strategic plan for risk. Once the strategic risk is identified and supported by a contingency plan the rest of the drivers become active in the sequence. All strategic plans must be evaluated for strategic risk before the strategy is implemented to reduce strategic casualties (Kaplan & Norton, 2008). However, depending on the maturity, size, and needs of the organization, leaders can take a customized a la carte approach to strategy management. For example, if the organization has one location with less than three business units, leaders can omit some of the drivers in each phase and still create a competitive strategic plan. If leaders in an organization have an existing strategic plan and are challenged in implementing the plan, they can start with the execution phase of the model. The

execution phase of the model provides a step-by-step approach to enhance their implementation. If leaders in an organization do not have a strategic plan, they can start in the analysis phases of the model. They can begin with an environmental scan and use the findings to generate a purposeful discussion with executives, middle managers, and frontline staff and employees. The ADEM model was designed to provide leaders with a proven path for execution that is customizable in its implementation.

The ADEM model is adaptable to diverse industries. For example, in academic medicine, it aligns research, clinical, and academic missions under one strategic map. In manufacturing, it enhances operational efficiencies through clear execution stages. In technology and services industries, it ensures alignment between fast-changing market demands and internal capabilities. The sequential, modular structure of the ADEM model makes it widely applicable and scalable. The utility of the ADEM model makes it useful for leaders in organizations. Refer to **Figures 2-6**.

**Figure 2** divides the ADEM model into two major stages: Pre-Retreat and Post-Retreat actions. The Pre-Retreat phase encompasses the Analyze and Develop stages, along with their respective drivers designed to ensure the strategy’s foundation is robust and data-informed. The Post-Retreat phase includes the Execute and Manage stages, supported by drivers that ensure proper implementation, monitoring, and adjustment.



**Figure 2.** The full spectrum modular design of the ADEM model for strategy management. *Note:* **Figure 2** was designed by Dr. Mario D. Wallace for this research study.

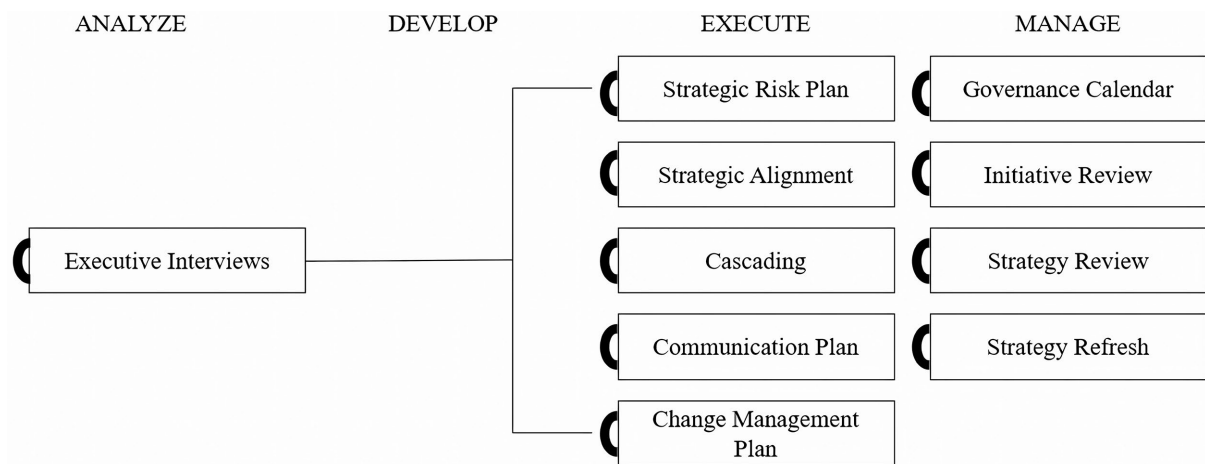
**Figure 3** highlights the model’s flexibility by showing how it can be customized. Leaders can selectively utilize specific drivers depending on the organization’s

strategic needs. For instance, an executive may choose to focus solely on Executive Interviews, the Strategy Map, and the Balanced Scorecard, bypassing other components without compromising the overall planning process.



**Figure 3.** Example customized ADEM model that arranged activities for taking a strategic plan off the shelf. *Note:* Figure 3 was designed by Dr. Mario D. Wallace for this research study.

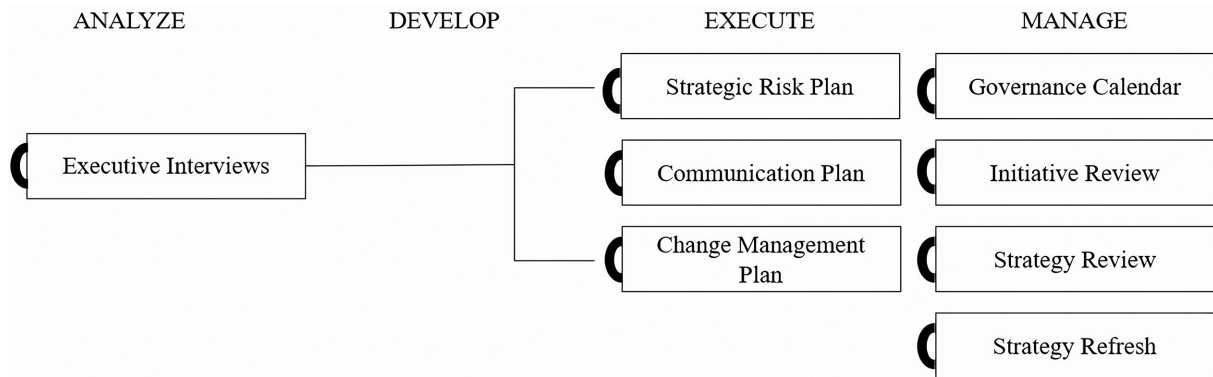
**Figure 4** demonstrates an alternative application of the ADEM model, using only the Analyze, Execute, and Manage phases. This configuration omits the Develop phase—ideal for organizations that already have a strategic plan in place but have experienced challenges with execution. In such cases, leaders can initiate Executive Interviews to gather insights, then proceed through Execute and Manage phases to drive improved outcomes.



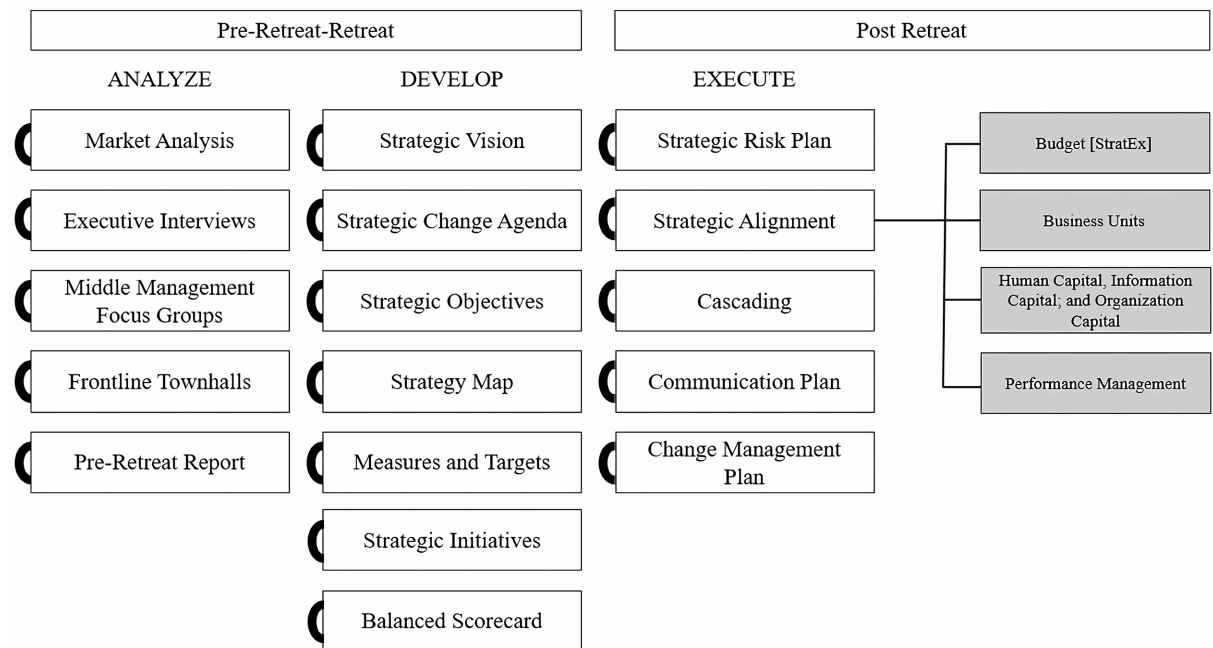
**Figure 4.** Example customized ADEM model that arranged activities for implementing an existing strategic plan. *Note:* Figure 4 was designed by Dr. Mario D. Wallace for this research study.

**Figure 5** shows a further customized version of the model, utilizing only a limited set of drivers. In this configuration, Executive Interviews are conducted under the Analyze phase, the Develop phase is omitted, and a select few drivers under Execute are applied. This model reflects a minimalistic yet targeted approach, al-

lowing leaders to adapt the framework to specific organizational goals or constraints.



**Figure 5.** Example customized ADEM model that arranged activities for setting up strategy review meetings to evaluate the performances of a strategic plan. *Note:* **Figure 5** was designed by Dr. Mario D. Wallace for this research study.



**Figure 6.** The strategic alignment driver consists of multiple sub-drivers in its application. *Note:* **Figure 6** was designed by Dr. Mario D. Wallace for this research study.

**Figure 6** mirrors the structure of **Figure 2** but expands upon the Alignment driver by introducing four sub-drivers: Budget Alignment, Business Unit Alignment, Human Capital Readiness, and Performance Management. These sub-drivers underscore the depth of the ADEM model. Budget alignment ensures that all strategic initiatives are appropriately funded. Business unit alignment ensures that both customer-facing and support units (e.g., operations, HR, communications) are working cohesively to advance the strategic agenda. Human capital readiness emphasizes aligning personnel and job roles with strategic initiatives, typically after unit alignment is complete. Performance management involves developing key

metrics and reporting mechanisms to evaluate progress and individual contributions to the strategic plan. These sub-elements were included in **Figure 6** to demonstrate the ADEM model's expansiveness and practical utility as a comprehensive guide for strategy management.

The usefulness of the ADEM model in the application of strategy management is one of its main strengths. The ADEM model was designed to help busy leaders resource their strategy while being aware of its logical progress. The four phases of the ADEM model provide leaders with a line of sight to manage decisions related to the strategy, control the pace, or adjust the structure of the strategy execution. The ADEM model gives busy leaders the oversight of the strategy process without affecting their day-to-day operations. The ADEM model consists of an arsenal of evidence-based management tools to foster robust discussions and direct the strategy. For example, the strategic change agenda (SCA) organizes the strategic vision into three categories: (1) dimension, (2) "As Is" state, and (3) "To Be" state. The SCA asks the question, what needs to change in the organization to achieve the strategic vision? What dimensions of the organization should be a resource to advance the strategy? The questions force leaders to identify key dimensions in the organization that are currently structured to prevent translating the strategy. The key dimensions are built out to highlight the "As Is": state and the desired "To Be" state of the dimensions. Basically, the SCA helps leaders spell out the future trajectory of the dimensions and considers how to resource it to help translate the strategy to achieve the strategic vision. Provided that the model is modular, educators can design content in a scaffolding way to increase knowledge, retention, and application of the model. Scaffolding is a teaching process that is designed to break learning into bite-size chunks. Phase-drivers are interdependent yet interdependent which can help educators or trainers design curriculum for each phase-driver and teach them independently to increase the conceptual knowledge and application of the phase-driver. For example, the strategy map consists of objectives that are independently developed prior to developing the strategy map. But the strategy map uses the objectives in a unique way by linking together objectives related to intangible assets such as people, culture, and information systems to tangible financial assets such as return on investment in a cause-and-effect manner. To create these linkages, it takes discipline, practice, skill, and precision to ensure the alignment of intangible assets and tangible ones. As a result, to achieve the desired outcomes from the structure of the strategy map, it should be taught independently in the chunking of lessons to enhance the knowledge and application of the strategy. Scaffolding the phases and drivers in the ADEM model helps to ensure knowledge, retention, and application of the model to increase its impact in an organization.

The ADEM model intersects with multiple evidence-based strategy management models that are designed to increase the impact on an organization's outputs and outcomes. The ADEM model intersects with red and blue ocean strategies, platform strategies, and the BSC. The ADEM model considers the red and blue

ocean strategies and platform strategies in the development of strategic objectives. Based on an environmental scan including executive interviews, middle management focus groups, and frontline town halls, leaders must synthesize all the data and create a strategic vision and a set of goals and objectives to translate the strategic vision into an organization. Provided that today's market is a postindustrial work, organizations must consider blue ocean strategies (BOS) and platform strategies (PS) including red ocean strategies (ROS) in their efforts to develop their goals and objectives. BOS considers a non-disruptive approach to developing an uncontested marketplace (Kim & Mauborgne, 2014). ROS, on the other hand, are strategies that are attributed to Michael Porter's doctrine of strategy management. ROS is an industrial approach to strategy management that was designed for the industrial age, and it focuses on the fierce competition related to the five forces of an industry (Porter, 1997). PS revolves around the idea of using platform participants which are independent contractors to create value for customers and to benefit from the presence of others (Parker & Van Alstyne, 2014). The goals and objectives are designed to leverage people in the market to create value or customers. The ADEM model uses the BSC as the umbrella of the strategy management process. The BSC is designed to develop, execute, and manage the lifecycle of an organization's strategic plan (Kaplan & Norton, 2008). Kaplan and Norton (2001) presented that the BSC framework is designed to formulate and design the strategy and to evaluate its effectiveness. The goal of BSC is to obtain the key factors of business success for managers across all tiers and create a synchronicity between the performance and the general strategy of the organization. The ADEM model uses proven intersecting frameworks in a modular sequential way to increase the organization's outputs and outcomes while attending to the barriers to change and fostering the desired culture.

The ADEM model is designed to intertwine culture and change sciences in its application. The overall structure of the ADEM model is designed to develop, execute, and manage strategy while mitigating resistance and intentionally drive culture. In the analysis phase, all the tiered layers of the organization are purposely included to set the culture and to model logically address barriers to change. According to Schein (1983), culture is the amplifier of strategy management. When developing a strategic plan, cultural strategies must be intertwined into the strategic plan to increase its opportunity for success. According to the BSC, culture is one element of organization capital which considers the attributes of leadership, alignment, teamwork, and culture (Kaplan & Norton, 2001). Leaders, middle managers, and staff and employees must align to the cultural factors to advance the strategy. For example, if the culture consists of fostering a high-performing, shared values innovative culture, all the information systems, behaviors, policies, and processes must support the cultural aspirations of the organization. Leading change, on the other hand, consists of managing the people through the change. Kotter (2007) argues that successful firms are those that can implement long-term change. The structure of the ADEM model helps in the

application of change management. The analysis phase, which is the first phase of the model, considers all three tiers in an organization leading up to the development of an organization's strategic plan. The linking of the drivers in this phase was designed to allow feedback and bidirectional flow of information prior to the development of a company's strategic plan. The purpose of the executive interviews is to allow them to propose direction for the organization. The proposed direction presents an informative pie in the sky idea to gather feedback from middle managers and frontline staff and employees. According to Hiatt (2006), the first reaction to a change creates the first response to resistance. The purpose of the middle manager focus groups is to allow them to react to the proposed direction presented by the executive leaders in an informative way. The middle managers must be able to inform the proposed direction based on managerial experience in the operations. The purpose of the frontline town halls is to get a reaction from the staff and employees related to their day-to-day tactical experiences in an organization. The town hall allows them to talk to executive and middle managers in an open setting to create buy-in to the proposed direction prior to the development of the organization's strategic plan. The feedback from the tiered groups in an organization is organized and used to create a pre-retreat report to present to leaders for a strategic planning retreat. Based on the information presented in the research study, the ADEM model includes four basic steps: analyze, develop, execute, and manage.

#### **4.1.1. Analyze**

The analysis phases of the ADEM model consists of six drivers: market analysis, executive interviews, middle management focus groups, frontline town halls, and a pre-retreat report. The most critical driver is the market analysis, which consists of both external and internal scans. The market analysis is the umbrella of the strategic plan and the anchor for all the following drivers. If a market analysis is poorly prepared, then the strategy will not produce the desired results for a firm. The overarching goal of the analysis phase is to collect information based on the political, economic, socio-cultural, and technological factors and to permit executive leaders, middle managers, and frontline employees to provide insights and feedback on strategic implications for the firm.

#### **4.1.2. Develop**

The development phase of the ADEM model consists of seven drivers: strategic vision, strategic change agenda, strategic objectives, strategy map, measures and targets, strategic initiatives, and the BSC. The most critical driver is strategic vision. The strategic vision is the Achilles heel development phase since it charts the destination of a firm, determines the lifespan of the strategic plan, and strategically positions a firm in the marketplace. The strategic vision is written with the intent to differentiate one firm from another firm in the same industry and to help translate a strategic plan into actionable steps. All the drivers are applied sequentially and build upon each other. For example, the strategic map organizes the strategic

objectives in a cause-and-effect logic to ensure the alignment of organization resources to effectively strategy execution (Risinger, 2018). The overarching goal of the development phase is to develop a competitive strategic plan that is actionable and consists of metrics, targets, and assigned strategic initiatives.

#### **4.1.3. Execute**

The execution phase of the ADEM model consists of seven drivers: strategic risk plan, strategic alignment, cascading, communication plan, and change management plan. All the drivers in the execution phase are extremely important in operationalizing a strategic plan. But the two critical drivers are the strategic risk plan and strategic alignment. The purpose of a strategic risk plan is to identify, evaluate, and prioritize risks within a strategic plan and to create contingency plans to mitigate the risk. Failure to rigorously evaluate and challenge risk in a strategic plan is the biggest intellectual failure for leaders. Strategic alignment, however, is the process of coordinating strategic activities across a firm to achieve enterprise derived value. Enterprise derived value is created through the synergies from the interdependent activities such as the budgeting strategic expenditures, aligning business units including the cascading of the enterprise objectives to the business units. Strategic alignment also consists of determining the perfect culture to support the strategic plan, closing the performance gaps of the leaders and employees, and augmenting their skills with the appropriate technologies. Lastly, strategic alignment consists of identifying the performance activities for leaders and employees to achieve to advance the strategic plan. The overarching goal of the execution phase is to align the internal resources of a firm to the strategic plan and to ensure the readiness of the leaders and employees to execute and manage the plan.

#### **4.1.4. Manage**

The management phase of the ADEM model consists of four drivers: governance calendar, initiative review, strategy review, and strategy refresh. All four drivers in the management phase are important to advancing the strategy plan and all of them play an independent yet interdependent role in advancing the strategic plan. The most critical driver, however, is the governance calendar. The governance calendar aligns all the strategic review meetings and coordinates the dates of a firm's strategic plan including the dates for the individual business unit plans. Basically, the governance calendar gives leaders a line of sight and control of a firm's strategic plan. The governance calendar also holds executives accountable for their role in the strategic plan. The overarching goal of the management phase is to gather specific information and feedback from stakeholders, solve problems, think strategically, and create new ideas to improve the firm.

## **5. Research Methodology**

The research study evaluated responses of 21 participants in leadership positions across multiple industries. Most participants worked for organizations that have

adopted the method, so they were quite familiar with the method. The organizations that have adopted the method are the Ohio State University Wexner Medical Center, University of Arkansas for Medical Sciences, the University of Arkansas at Little Rock, the Community Health Centers of Arkansas, the Community Health Center Association of Mississippi, the Women Veteran Center in Memphis VA Health Care for Women, Aledade, and the University of Indianapolis Diversity Department.

The 21 participants evaluated the performances of the phases and drivers of the ADEM model of strategy management in comparison to other strategy management methods.

A purposive judgmental sample was used to arrive at the sample size. While purposive sampling limits generalizability, it was appropriate for this exploratory study because participants were selected based on their familiarity with and application of the ADEM model. Future research using larger, randomized samples can enhance generalizability. The participants were identified as decision makers in their organizations. To qualify for the research study, participants had to meet the following criteria:

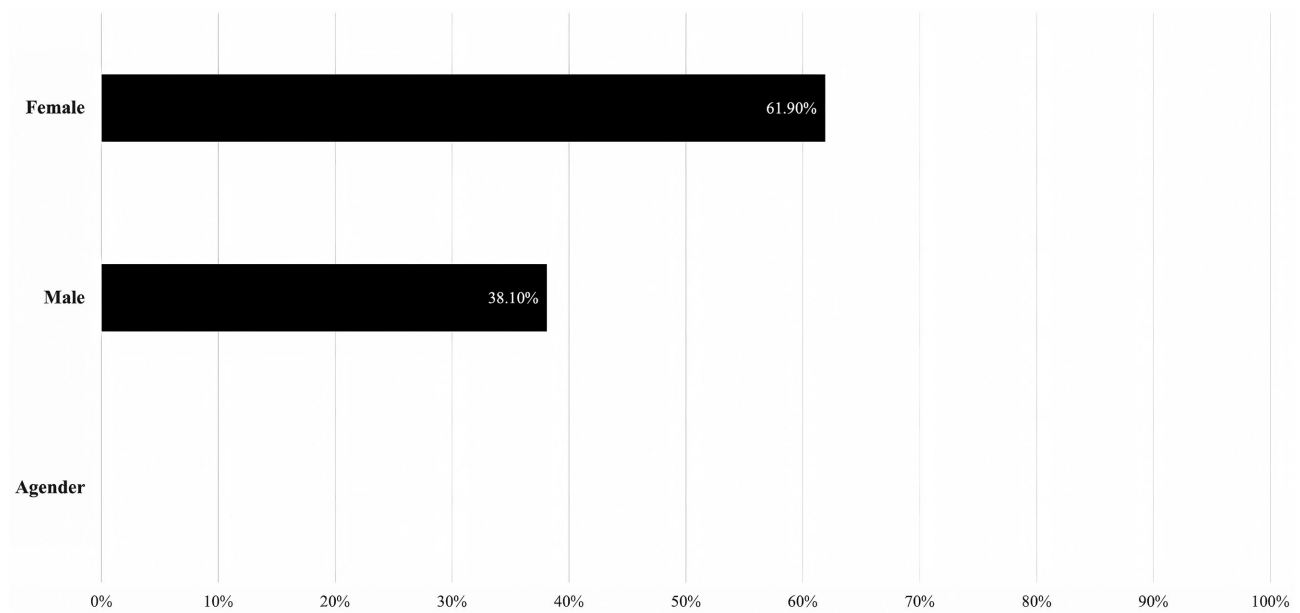
- 1) Professionals must have at least five years in a senior management position.
- 2) Fully familiar with a strategy management system or framework.
- 3) Full or partial familiarity with the ADEM model.

The researchers contacted the professionals by email and social media sites such as LinkedIn requesting their participation in the research study. The researchers emailed the participants the instructions for the research which included an embedded link to the survey. Researchers used SurveyMonkey as the instrument for the survey. The email also included an attached document of terms and definitions which clarified each phase and driver in the ADEM model. The researchers used the nonparametric Wilcoxon test to analyze the responses from the participants.

The questionnaire consisted of 25 questions using the Likert Scale  $-4 =$  Much Worse;  $-2 =$  Somewhat Worse;  $0 =$  About the Same;  $2 =$  Somewhat Better; and  $4 =$  Much Better. The first three questions were general questions about the utility and usefulness of the ADEM model. The remaining 23 questions were related to the phases and drivers of the ADEM model. The participants rated each expert opinion about each phase and driver of the ADEM model, whether the perceived application or the conditions of their strategy were better or worse or much worse than before the implementation of the strategy model.

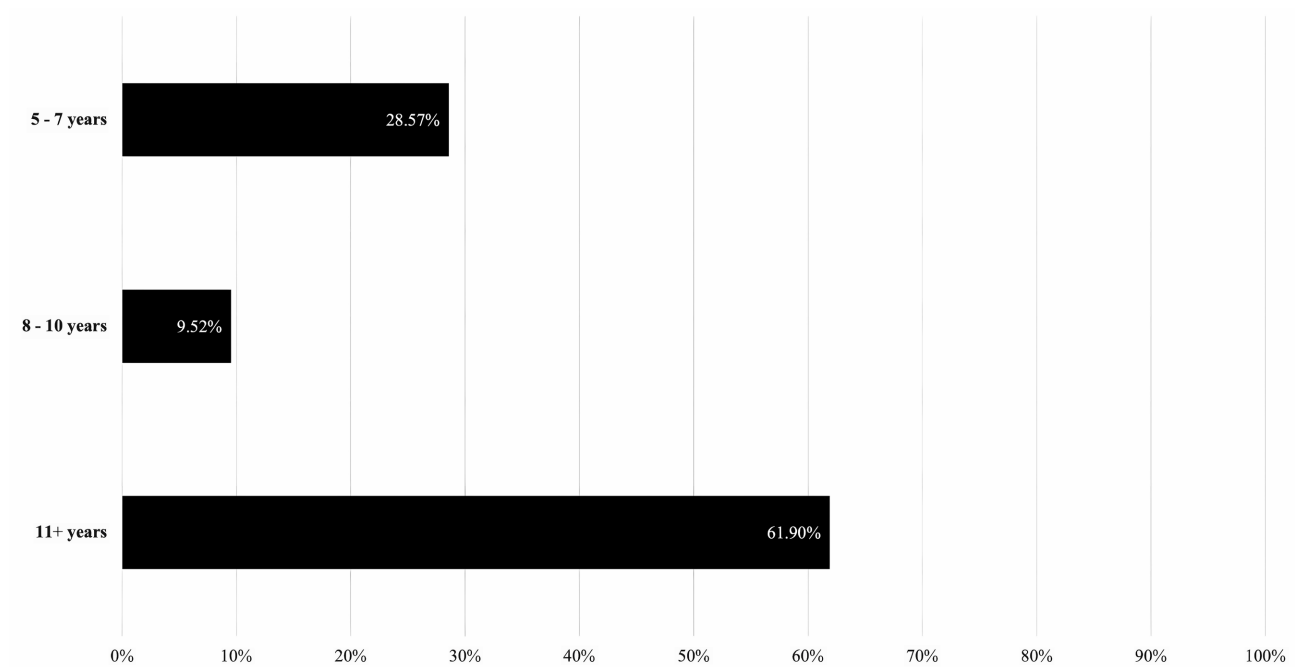
## 6. Data Analysis

In this research study, to investigate the effects of the ADEM model, the Wilcoxon test was used to analyze the responses of the 21 participants who had completed the standardized questionnaire. Of the 25 participants who were invited to participate ( $n = 21$ ) in the research study, 21 participants responded to the questionnaire. Females accounted for 61.90% and males accounted for 38.10%. Refer to **Figure 7**.



**Figure 7.** The graph communicates gender as a percent of participants in the study.

The professional careers of the respondents range from Senior Administrators to Senior Consultants. The participants ranged from five to seven years 28.57%, eight to 10 years 9.52%, and 11+ years 61.90% in leadership positions. Refer to **Figure 8.**



**Figure 8.** The graph communicates the participant's years in leader/manager position.

The participants also ranked the ADEM model according to perceived usefulness at 76.19%, perceived utility at 83.96%, and perceived sequential approach at

66.67% in comparison to other strategy management models.

The aim of the research study was to evaluate the effectiveness of the ADEM model in comparison to other strategy management methods. Researchers used the Wilcoxon non-parametric statistical method to evaluate the responses of the participants.

Researchers evaluated the collective whole of the ADEM model while breaking down the four phases and drivers. The findings from the research study show that the ADEM model has the greatest impact on strategy implementation in the following parts, respectively. The percentages show the different rankings per phase. Refer to **Table 3**.

**Table 3.** Comparative effectiveness per phase in the ADEM model.

Phases	%
Analyze	55.7%
Develop	57.1%
Execute	60%
Manage	56%

The findings of the research study rank the phases in the ADEM model in the sequence: execute, develop, manage, and analyze. The participants ranked the execution phase higher than all the phases in the ADEM model and in comparison, to other strategy management methods. The results show that the ADEM model is most effective in creating alignment (Q17) which has a total ranking of 58 in comparison to the totals of the other four drivers (46, 44, 50, and 54) in the phase. Alignment is very significant in the strategy management processes especially, when there is a corporate strategic plan that is supported by business unit strategic plans. The resources of an organization must be properly aligned according to the corporate strategic priorities to create the necessary synergies across an organization. According to the participants, the lowest driver in the execution phase is cascading (46). Similarly, to align, cascading is the act of identifying strategic objectives included in the corporate strategic plan that must be assigned to the appropriate business unit to effectively engage and mobilize the people to advance the strategy. The low ranking in cascading shows the value placed on this driver by the participants.

The participants ranked the development phases the second highest in the phases in the ADEM model and in comparison, to other strategy management methods. The results show that ADEM model's most effective driver is the strategic change agenda (Q10), which has a total ranking of 54 in comparison to the total of the other four drivers (48, 50, 48, 46, 42, and 48) in the phase. The strategic change agenda is very significant in setting the stage for developing a strategic plan. The strategic change agenda uses strategic vision to determine the desired changes in an organization's domains to help develop and translate a strategic

plan throughout an organization. According to the participants, the lowest driver in the development phase is the strategic initiative with a total ranking of 42. Similarly, to the strategic change agenda, the strategic initiative is a critical driver in the strategy management process. The strategic initiative is the only action in a strategic plan that engages and mobilizes resources according to a timeline to achieve desired outcomes. The low ranking of the strategic initiative shows the value placed on this driver by the participants.

The participants ranked the management phases lower than both the execution and the development phases in the ADEM model and in comparison to other strategy management models. The results show that the ADEM model's most effective driver in the management phase is (Q23) the strategy review meeting, which has a total ranking of 50 in comparison to the totals of the other four drivers (46, 48, and 44) in the phase. The strategy review meeting is essential in the strategy management process. The strategy review meeting is designed to review the entirety of the strategic plan including the objectives, measures, targets, and strategic initiatives. The leaders of the strategic management process use the meeting to determine the progress of the strategy, to discuss resources, impact, and risk, and to adjust the strategic plan accordingly. According to the participants, the lowest driver in the development phase is the strategy refresh meeting with the total ranking of 44. The strategy refresh meeting is designed to pressure test the existing strategy to determine its viability in the changing market. The strategy refresh meeting is just as important as the strategy review meeting since it ensures that the organization adapts to the market as it changes to remain competitive. The low ranking of the strategy refresh meeting shows the value placed on this driver by the participants.

The participants ranked the analysis phase lower than all the rest in the ADEM model and in comparison, to other strategy management models. The results show that the lowest ranking driver is the market analysis (Q4) with a ranking of 34 in comparison to the totals of the other four drivers (48, 50, 52, and 50) in the phase. The market analysis is a "must have" in the strategic management process. It sets the stage for determining the strategic direction and the strategic position for an organization. Creating a strategic plan without scanning the market forces can be detrimental for an organization. The low ranking of the market analysis shows the value placed on this driver by the participants. According to the participants, the results show that the ADEM model's most effective driver is the front-line town halls (Q23), which has a total ranking of 52. The purpose of the frontline townhall driver is to ensure that people at all the tiered levels in an organization participate in the strategic discussion prior to the development of an organization's strategic plan. The goal of this driver is to engage and to achieve buy-in from the frontline staff and to mitigate resistance to change before the strategy is ever implemented. The high ranking of the frontline town halls shows the value placed on this driver by the participants.

### **The ADEM Model's Overall Ranking**

Based on the responses of the participants, the ADEM model is generally 50.8% more effective and overall better than other strategy management methods. The 50.8% figure represents the average increase in perceived effectiveness of the ADEM model relative to other strategy management methods, as reported by study participants. This metric is derived from participant responses across key strategic domains: analysis, development, execution, and management of strategic plans. The participants, experienced leaders and professionals, evaluated both the ADEM model and other strategy management approaches, indicating their preference and perceived effectiveness using a structured survey instrument.

The Wilcoxon signed-rank test was employed to compare the paired observations of participant ratings between the ADEM model and alternative methods. The test yielded statistically significant results, indicating that the differences in ratings were not due to chance. Specifically, the magnitude of difference between the ADEM model and other methods was quantified, showing a 50.8% average improvement in positive evaluations in favor of the ADEM model.

This percentage reflects a relative gain in perceived effectiveness—meaning that participants, on average, found the ADEM model to be notably superior in facilitating strategic clarity, cross-functional alignment, executional focus, and overall management of strategy. The integration of BSC principles, along with strategic concepts from ROS, BOS, RBT, and others, contributed to the participants' perception that the ADEM model is more comprehensive and practical in real-world application.

As a result, the 50.8% effectiveness claim is not an absolute performance measure but a statistically significant perception-based evaluation, grounded in participant experience and reinforced by the Wilcoxon test. Future research with broader, randomized samples can further validate this finding and assess its generalizability across industries and organizational contexts.

The Wilcoxon test results are as described in **Table 4**. According to the results obtained, the test is meaningful, and according to the table and the average of the positive responses of the model, the ADEM model is highly effective.

**Table 4.** NPar test wilcoxon signed ranks test.

		N	Mean Rank	Sum of Ranks
af - be	Negative Ranks	2 <sup>a</sup>	8.00	16.00
	Positive Ranks	19 <sup>b</sup>	11.32	215.00
	Ties	0 <sup>c</sup>		
	Total	21		

<sup>a</sup>af < be; <sup>b</sup>af > be; <sup>c</sup>af = be.

The sig 0.001 indicates strong evidence that the ADEM model is effective in comparison to other strategy management methods. It signifies that the observed result is unlikely to have occurred by chance.

**Table 5.** Z test statistic for Wilcoxon Signed Ranks Test.

Z	-3.458 <sup>b</sup>
Asymp. Sig. (2-tailed)	0.001

<sup>a</sup>Wilcoxon Signed Ranks Test; <sup>b</sup>Based on negative ranks.

The positive z-score of 3.458 can provide evidence against the null hypothesis, particularly if it corresponds to a very small p-value (significance level).

The z-score of -3.458 was calculated in the research study based on the responses from the participants. This z-score -3.458 indicates the significance level of the ADEM model in comparison to other strategy management methods (**Table 5**).

## 7. Limitation

Although the sample size of (n = 21) participants inherently limits the generalizability of the findings, acknowledging this methodological constraint enhances the study's scholarly rigor. The use of a small, purposively selected sample may constrain the applicability of the results across diverse organizational contexts. To enhance the external validity of the ADEM model, future research should utilize broader, randomized samples across multiple industries to more robustly evaluate its effectiveness and scalability.

## 8. Discussion

The findings from the research study show the effectiveness of the ADEM model in comparison to other strategic management methods. The participants used their knowledge and experiences to rank the phases and drivers of the ADEM model. Overall, the participants ranked most of the ADEM model's phases and drivers higher in comparison to phases and drivers in other strategy management methods. But they also ranked certain key drivers lower than expected. The participants ranked the drivers market analysis, cascading, strategic initiative, and strategy review meeting extremely low in comparison to other drivers in their grouping. These low-ranking drivers signify the value placed on them by the participants, which can be detrimental in the development, execution, or management of a strategic plan. For example, the strategic initiative is the source of engagement in a strategic plan. The strategic initiative engages the people in an organization to work toward accomplishing strategic priorities according to a timeline. Strategic initiatives are prioritized, assigned to teams, and implemented in a sequenced order. The sequenced order is governed by the leadership team in an organization to ensure the progress of the strategic plan. If the strategic initiative is considered a low valued driver in strategy management, the actions behind this thought will have a detrimental effect on an organization's existence and competitiveness.

The small and purposive sample may limit the ability to generalize the findings across all organizational contexts. Future research should explore broader, ran-

domized samples across industries to validate the model's effectiveness and adaptability at scale.

## 9. Conclusion

The aim of the current research was to evaluate the effectiveness of the ADEM model compared to other strategy management methods. Research findings show that the ADEM model is rated 50.8% more effective and overall better than other known strategy management methods by the study participants. However, the effectiveness of the ADEM model as a strategy management solution depends on the people who are responsible for analyzing, developing, implementing and managing the strategy management process. The overall effectiveness of the ADEM model is measured by the impact of the strategy on the organization.

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## Conflicts of Interest

The authors declare no conflicts of interest regarding the publication of this paper.

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