An AI-Assisted Framework

Mastering Strategic Planning in Unstable Environments

Dashboard + Prompts

Marcelo Manucci - 2025

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Planning in Uncertainty

This **AI-Assisted Strategic Planning and Approach Dashboard** is designed to guide leaders, teams, and organizations in comprehensively developing projects that integrate three core dimensions: productive performance, cultural development, and strategic projection. Its methodology moves from conceptual formulation to indicator definition, incorporating an emotional framework that acknowledges the link between motivation, belonging, and productivity. The latest version integrates AI assistance, significantly boosting its operational value. Through prompt engineering and intelligent modeling, the system enables:

- **Agile iteration of strategic variables**
- **Identification of hidden patterns**
- **Analysis of non-linear interactions**
- **Extrapolation of emerging variables**
- **Scenario simulation**
- **Definition of intervention paths**
- **Construction of dynamic indicators**

This integration allows for evidence-based project design that is also sensitive to human dynamics.

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Performance Paradoxes

Today's business landscape demands that organizations make critical strategic decisions amidst constant instability. Traditional planning tools, built for stable and predictable environments, are proving inadequate against the rapid pace of change, global interdependence, and technological disruption. In high-uncertainty contexts, organizations face a core tension: the need for rapid responses clashes with cultures and processes anchored in control and predictability. This leads to a paradoxical effect where increased performance demands can activate mechanisms that undermine it:

Ineffective Efficiency: Systems become inefficient due to structural flaws in responding to environmental demands. This inefficiency stems from a rigid design that lacks a response repertoire for current contexts. Thus, "inefficient" systems—those deviating from protocols— paradoxically gain more freedom to generate adaptive structural alternatives. Inefficiency becomes a survival response when no other options exist, allowing for continued operational effectiveness.

Dynamic Inertia: Organizations stagnate from an inability to act under new conditions. Inertia arises from fear of the unknown and the challenge of adapting. While there's often consensus on the need for change, it doesn't materialize deeply. Structures may be redesigned and technologies introduced, but mindsets and power dynamics remain unchanged. This erodes credibility and trust in the organization's capacity for real transformation.

Resistance to Change. Change is resisted when individuals perceive it as meaningless or threatening to their existence. This directly impacts motivation. Gallup's "What Followers Want" report indicates that the most valued leadership quality is not efficiency but the ability to provide direction, hope, and an emotional connection to purpose. Technical clarity alone doesn't guarantee effective execution.

These paradoxes create a cycle of deterioration: purpose-devoid efficiency weakens motivation; lack of real transformation erodes credibility; and emotional disconnection blocks collective action. This leads to structural apathy, where teams are disengaged, leaders lose influence, and systems run on inertia rather than vision.

FIVE KEYS TO MANAGING UNCERTAINTY

Anticipate the local impact of global complexity: Understand contextual transformation to maintain a dynamic stance.

Transform instability into opportunities: Incorporate diverse variables into decision-making to generate more alternatives.

Design an architecture for movement: Create processes that enable exploration of possible states.

Prepare teams for the unknown: Enhance personal skills to face decisions under uncertainty.

Decide in the present without losing the future: Manage multiple complexity levels to maintain focus on both current realities and future aspirations.

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The Planning Dashboard

Strategic Dimensions of Approach

In unstable contexts, planning must go beyond projecting goals and timelines. It's crucial to design flexible, adaptive structures for continuous intervention, adjustment, evaluation, and redirection. This requires a tool that integrates technical analysis with an emotional understanding of the organizational environment.

The Strategic Planning and Approach Dashboard offers a five-step sequence for structuring projects with methodological clarity and contextual sensitivity. This architecture organizes interventions across three complementary levels: project, culture, and performance. Each step progressively expands from the project's conceptual core to its execution, monitoring, and organizational impact. The sequence is designed to structure the process and generate meaning, aligning teams, building belonging, and mobilizing commitment.

At each stage, integrating technical data, qualitative analysis, and emotional assessment is recommended, especially in organizations experiencing institutional fatigue or accumulated resistance to change. AI can assist by simulating scenarios, predictive modeling, analyzing non-linear relationships, and extrapolating emerging variables..

The Five-Step Logic:

Objective Delimitation: Clearly define what you want to achieve and why. This step organizes the project's intent in strategic, symbolic, and operational terms.

Project Formulation: Translate the objective into a set of decisions, processes, and relationships. This structures the project's functional base and key components.

Intervention Design: Establish how the system will be influenced: actions, resources, sequence, and actors. This is the execution plan.

Action Deployment: Execute and accompany. This involves monitoring, adjusting, maintaining stakeholder relationships, and anticipating resistance.

Impact Evaluation: Measure results and interpret learnings to strengthen future processes.

AI can assist at each stage by analyzing interdependencies, estimating optimal execution times, identifying resistance zones or key talent, and suggesting real-time adjustments.

Application Sequence

0 Introduction & Context

Establish a clear framework to guide the process, using all the relevant information about the organization, the project's purpose, the context or market, and the situation that the project will address.

Articulate the project profile, focus, application environment, and key stakeholders involved. [Pr0]

1 Project Formulation

Every intervention begins with a decision: What do you want to achieve? This step involves defining the strategic core of the project, not only in technical terms, but also in terms of its organizational meaning. Clarity of purpose defines the consistency of all subsequent implementation.

Define a simple phrase that represents your contribution to the organization in five or six words. [Pr1]

2 Definition of Objectives

In this step, you must translate the overall purpose into specific objectives for each of the three levels of development. In this way, the purpose is transformed into concrete guidelines for action.

Work on specific verbs that help to bring the concept to life. A maximum of three verbs for each theme.

Productive Axis. Defines the technical results. It refers to specific improvements in processes, structures, efficiency, or management. This axis represents the functional dimension of the project. *What objectives are set to achieve a higher level of productive growth and technical/economic development in the project?*

Technical, safety, quality, sales, logistics, customer service, proposals, service, intervention. [Pr2]

Talent Axis. Addresses the expected impact on the internal dynamics of the system. It deals with how the project is expected to transform relationships, the climate, habits, and collective emotions. This axis articulates the relational and symbolic dimension. *What are the objectives to achieve competitive and committed human talent?*

Climate, integration, well-being, innovation, training. [Pr3]

Social Axis. Focuses on the strategic contribution of the project to the future development of the organization. It is linked to innovation, institutional identity, positioning, and sustainability. This axis represents the visionary and evolutionary dimension. *What objectives are set to extend the presence of the project/brand/organization to the different audiences involved?*

Workers, stakeholders, community. [Pr4]

3 Definition of Intervention Programs

In this step, you will define the tactical axes that organize and articulate the actions to achieve the objectives set. You can create more than one intervention program per objective. This will be the tactical architecture that organizes the actions according to the objectives of each axis, time frame, and expected results.

Define programs with a set duration or open-ended depending on the complexity of the project. [Pr5] [Pr6] [Pr7]

4 Definición de acciones en cada eje

In this step, you define the specific activities to implement the programs. These actions are dynamic, with different types of implementation and duration.

Design actions for different implementation modalities and expression codes. [Pr8] [Pr9] [Pr10] [Pr10b]

5 Definition of indicators

In this step, measurement indicators must be created to visualize the scope of the project in relation to the defined strategic objectives. These indicators are global in nature, based on the verbs defined in the objectives, not on individual actions. Therefore, the variables to be measured must be based on the verbs that were initially outlined.

Combine quantitative and qualitative measurements to account for processes. [Pr11]

Project Dashboard

Prompt sequence application for project design

1

Conceptual Definition

What is the purpose of the project?

[Pr0]

Project Concept

[Pr1]

2

Definition of Objectives

What are the objectives at each level?

Technical Axis

[Pr2]

Talent Axis

[Pr3]

Social Axis

[Pr4]

3

Definition of Programs

How to organize actions?

Technical Programs

[Pr5]

Talent Programs

[Pr6]

Social Programs

[Pr7]

4

Definition of Actions

What are the actions?

Technical Growth

[Pr8]

Talent Development

[Pr9]

Social Engagement

[Pr10]

[Pr10b]

5

Definition of Indicators

What are the measurements?

Activity Impact

[Pr11]

Culture Impact

Engagement Impact

Project Dashboard

Prompt sequence application for project design

Conceptual Definition

What is the purpose of the project?

Create new business units in new markets to optimize production.

Project Concept

Strategic transformation for new competitive scenarios.

Definition of Objectives

What are the objectives at each level?

Technical Axis

Strengthen technical learning
Provide quality service
Generateintegrated decisions

Talent Axis

Foster creativity and innovation
Provide an inspiring climate
Support professional growth

Social Axis

Generate social recognition
Be attractive to new talent
Broaden institutional links

Definition of Programs

How to organize actions?

Technical Programs

Customer Service Program
Quality Program
Leadership Program
Information System

Talent Programs

Well-being Program
Family Program
Mentorship Program

Social Programs

Alliances Program
Institutional Relations
International Evaluation

Definition of Actions

What are the actions?

Technical Growth

Contact center
ISO 9001 workshops
Safety Plan
Industrial safety

Talent Development

Integration workshop
Group coaching
Leaders coaching
Diversity workshop

Social Engagement

Social media
Urban campaigns
Specialized press
Trade Shows
Events
Contact app

Definition of Indicators

What are the measurements?

Activity Impact

Efficiency level
Implementation level
Growth level
Rotation rate

Culture Impact

Innovation index
Participation level
Satisfaction level
Internal climate

Engagement Impact

Recognition index
Reputation level
Press presence
Ranking positions

Downloadable Resources

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