



# Building an Impactful Strategic Roadmap

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# Agenda & Goals of this Session

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Impactful Strategic Roadmaps

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A Conceptual Model for Building Roadmaps

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Developing a Business Strategy

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Value-Stream Assessment

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Capability Modeling & Analysis

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Roadmap Development & Example

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Influence & Adoption



# Strategic Roadmaps

## *Strategy vs. Operations*



According to PwC, only 8% of Organizations excel at both Strategy and Operations

# Strategic Roadmaps

## *What Makes an Impactful Roadmap?*

- Is a powerful tool to communicate vision
- Synthesizes near-term tactical and long-term strategic activities and decisions – LINKING strategy to Execution
- Emphasizes multi-year timelines



- Provides clear understanding of capabilities, gaps, priorities, and dependencies needed to achieve the vision.

### Impactful Roadmaps

#### Creation & Maintenance

Accurate

Repeatable

Maintained

Traceable

Measurable

#### Communication

Consumable

Accessible

Properly Scoped

Multi-Year

#### Use

Aligned

Complete

Connected

Contextualized

Integrated

Adaptable

### Common Problems

Too Tactical

Too Strategic

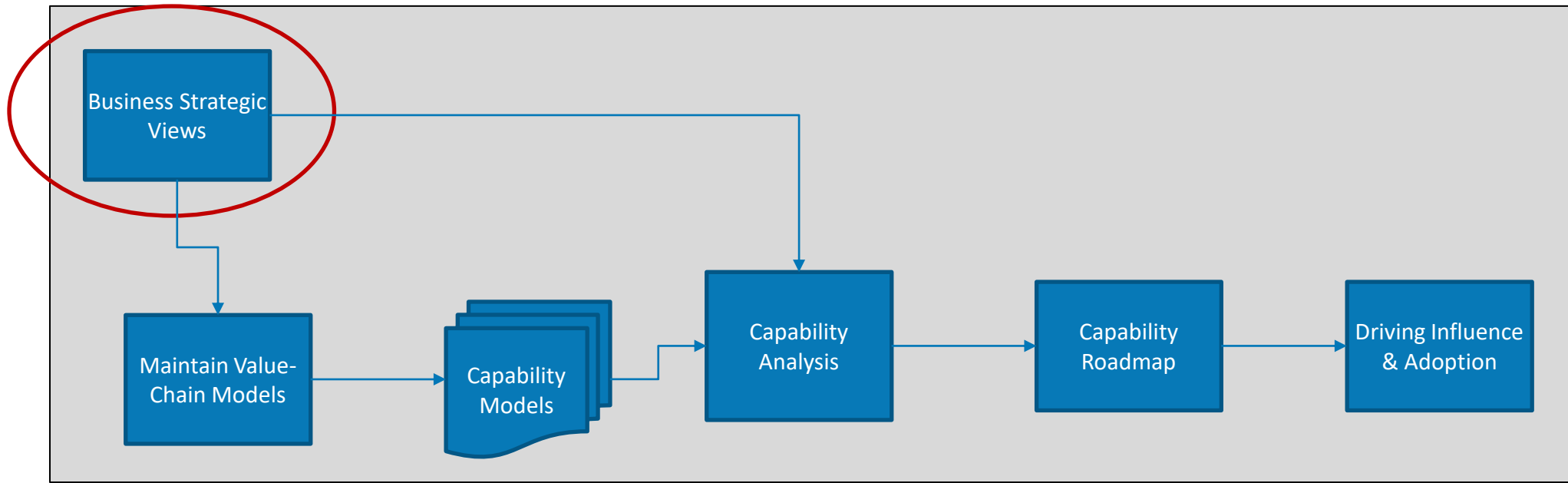
Siloed Information

No Standardization

Unclear Dependencies

# Conceptual Model For Building Roadmaps

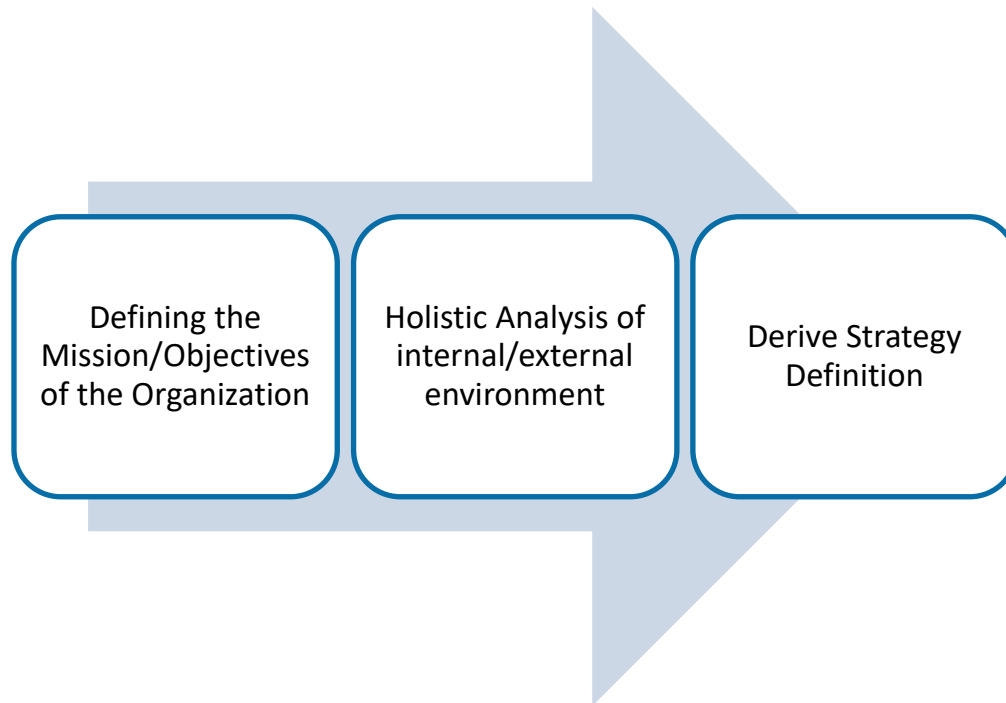
## *Business Strategy Views*



# Business Strategic Views

## *Developing the strategy*

- Aligned to Strategic Planning Processes
- General Steps that are used:



# Business Strategic Views

## *Strategic thinking skills*

We're all different – determine what works to engage the creative aspects of your brain (whole brain) left for logic and right for creativity in bilateral thinking.

Brain activities:

- <https://archimedes-lab.org/>
- Games (Braid on Steam, Best Tycoon Games: Own the World website, etc.)

### LEFT BRAIN

What it does:

- Deductive Reasoning
- Creative thinking
- Focused on creativity
- Prefers fiction
- Imagination
- Artistic
- Emotional Intelligence

Drawbacks:

- Have trouble with structure and details
- May be overcome with clutter and disorganization

### RIGHT BRAIN

What it does:

- Inductive Reasoning
- Analytical thinking
- Focuses on Facts
- Prefers non-fiction
- Rational thinking
- Logical thinking
- Tactical thinking

Drawbacks:

- Cannot synthesize Creative ideas to find clarity in ambiguity
- Limits creative thoughts originating in right side of brain

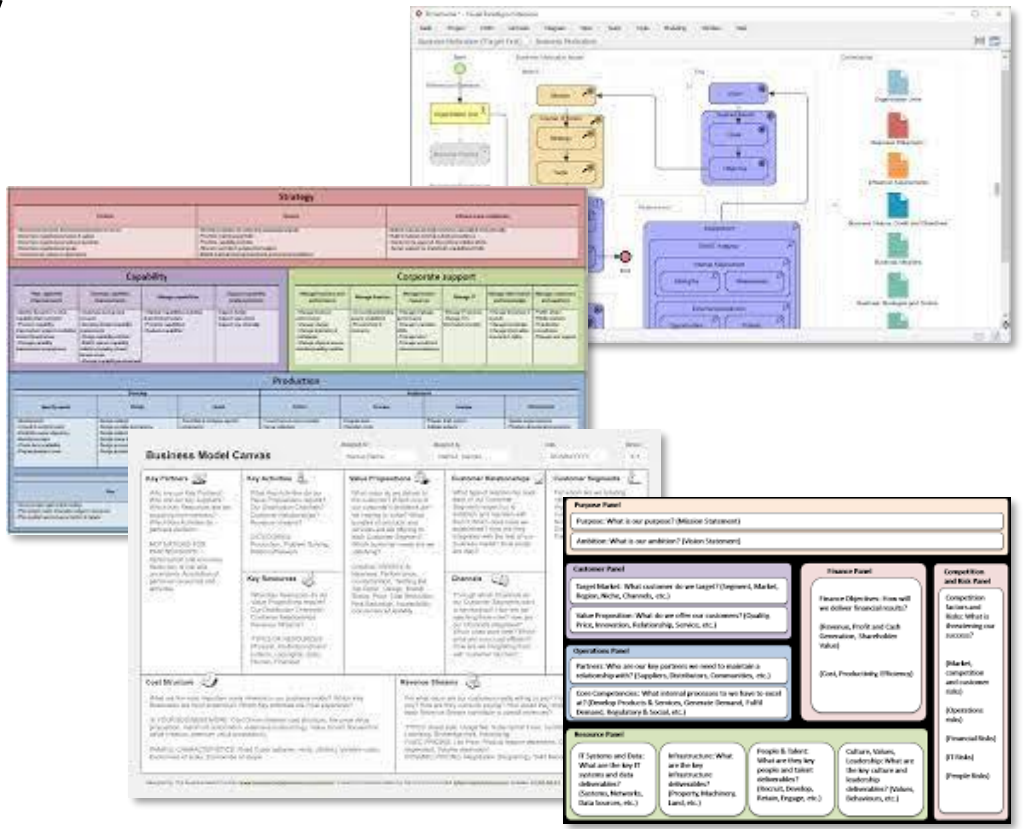


# Business Strategic Views

## Common Artifacts

### Artifacts that can assist in capturing the Business Strategy

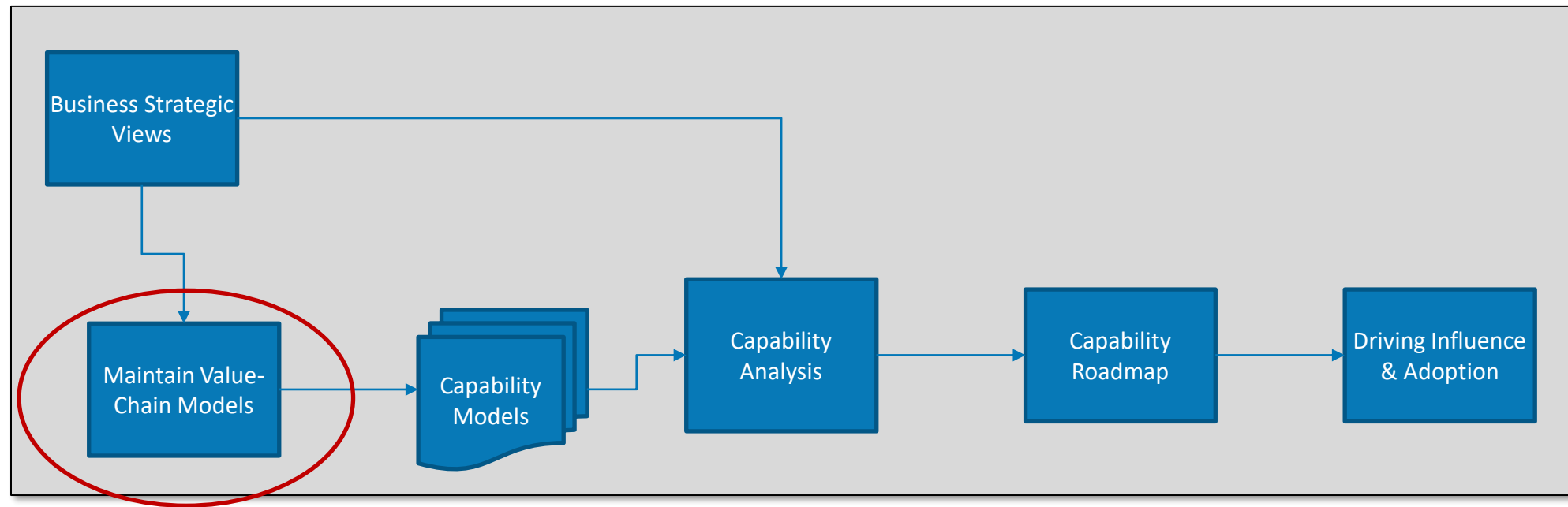
- 1. Business Model Canvas
- 2. Business Motivation Model
- 3. Strategic Planning:
  - 1. SWOT Analysis
  - 2. Competitive Analysis
  - 3. Benchmarking
- 4. Strategy on a Page
- 5. Value Stream
- 6. Customer Journey Maps
- 7. Goal/Objective/Service Diagram





# Conceptual Model For Building Roadmaps

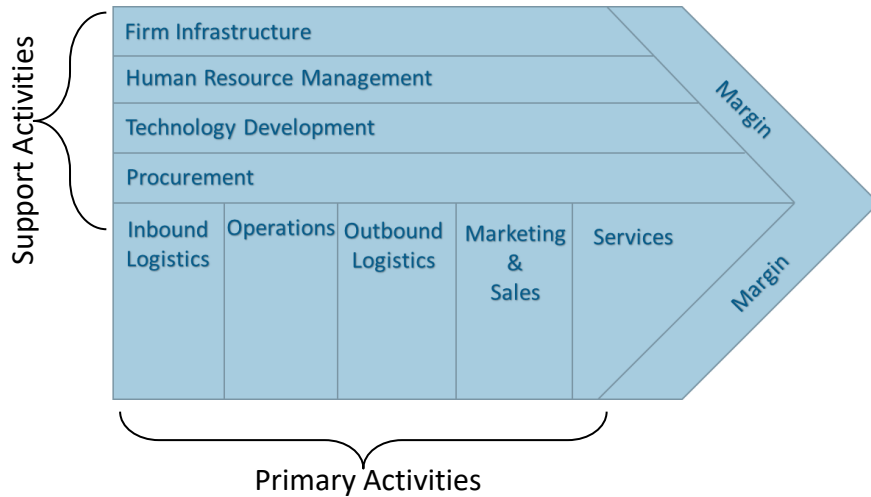
## *Value-Chain Models*



# Value Chains

## Connecting Capabilities to Business Strategy

### Porter's Value-chain approach



Step 1: Identify Primary/Supporting Activities



Step 2: Determine Cost & Value of Activities



Step 3: Identify Opportunities for Competitive Advantage

And / Or

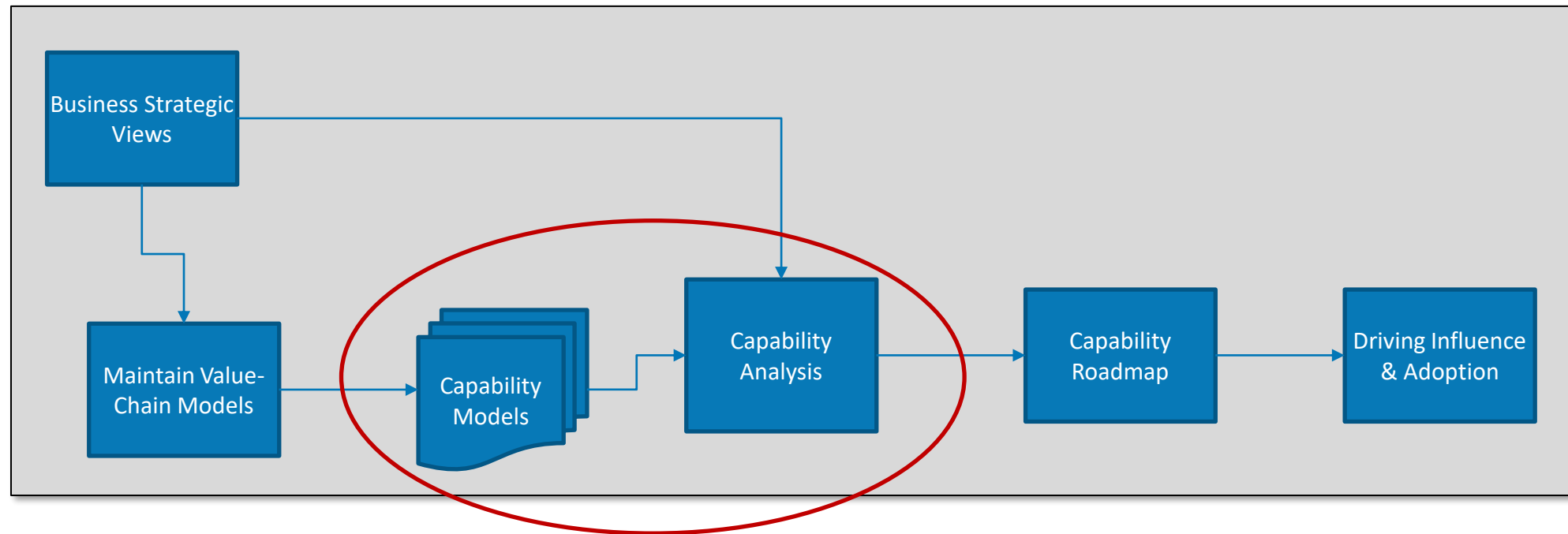
### Business Outcome Journey Map

Value Stream	Marketing	Sales	Service Delivery	Support
Goals / Outcomes	<ul style="list-style-type: none"> <li>• Increase Market Share by 10%</li> <li>• Increase ...</li> </ul>	<ul style="list-style-type: none"> <li>• 90% Customers return ...</li> </ul>	<ul style="list-style-type: none"> <li>• 95% Customer Satisfaction</li> <li>• 99.9995% SLA</li> </ul>	
Value Propositions	<ul style="list-style-type: none"> <li>• Best-in-class services ...</li> </ul>	<ul style="list-style-type: none"> <li>• Industry leader in ...</li> </ul>		
Capabilities	<ul style="list-style-type: none"> <li>• Campaign Mgmt</li> <li>• Channel Mgmt</li> <li>• Brand Mgmt</li> </ul>			

# Conceptual Model For Building Roadmaps

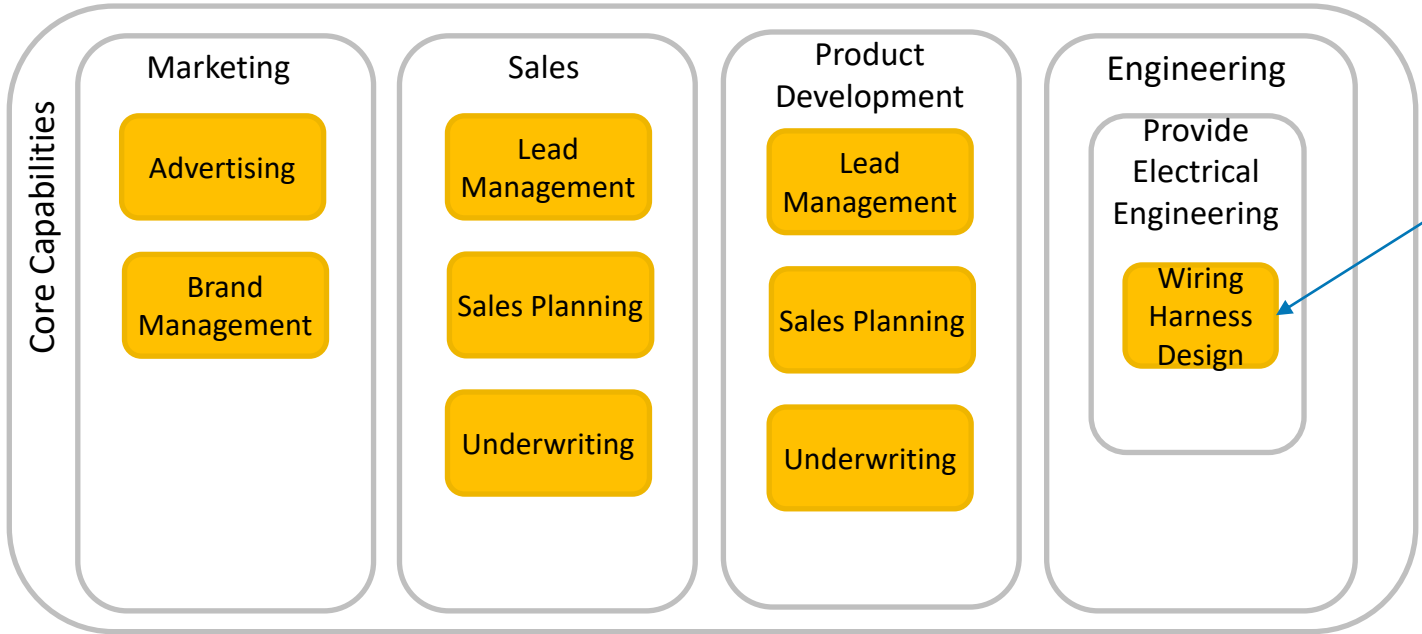
## *Capabilities*

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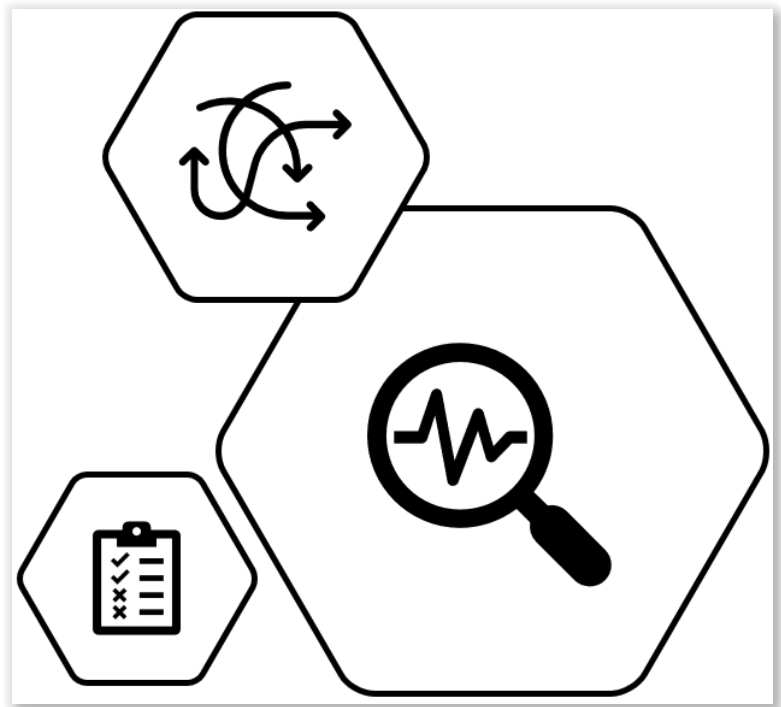
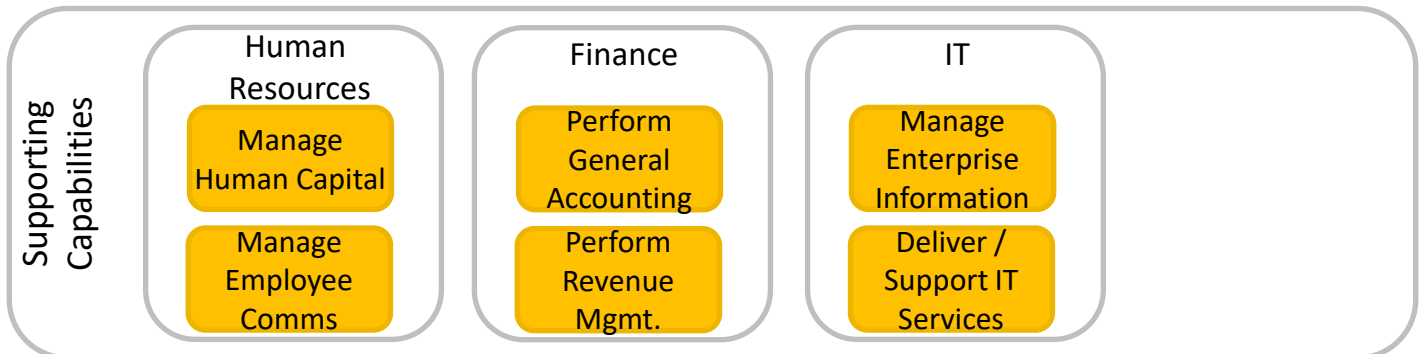
# Capability Model

## Overview & Example



### Assessment Scores

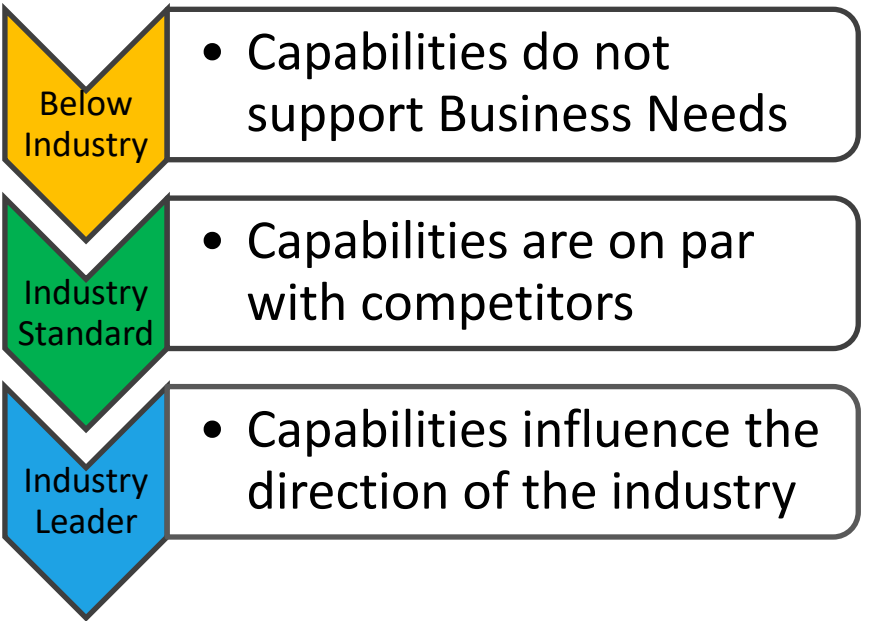
Maturity: *n*  
Importance: *n*  
Adaptability: *n*



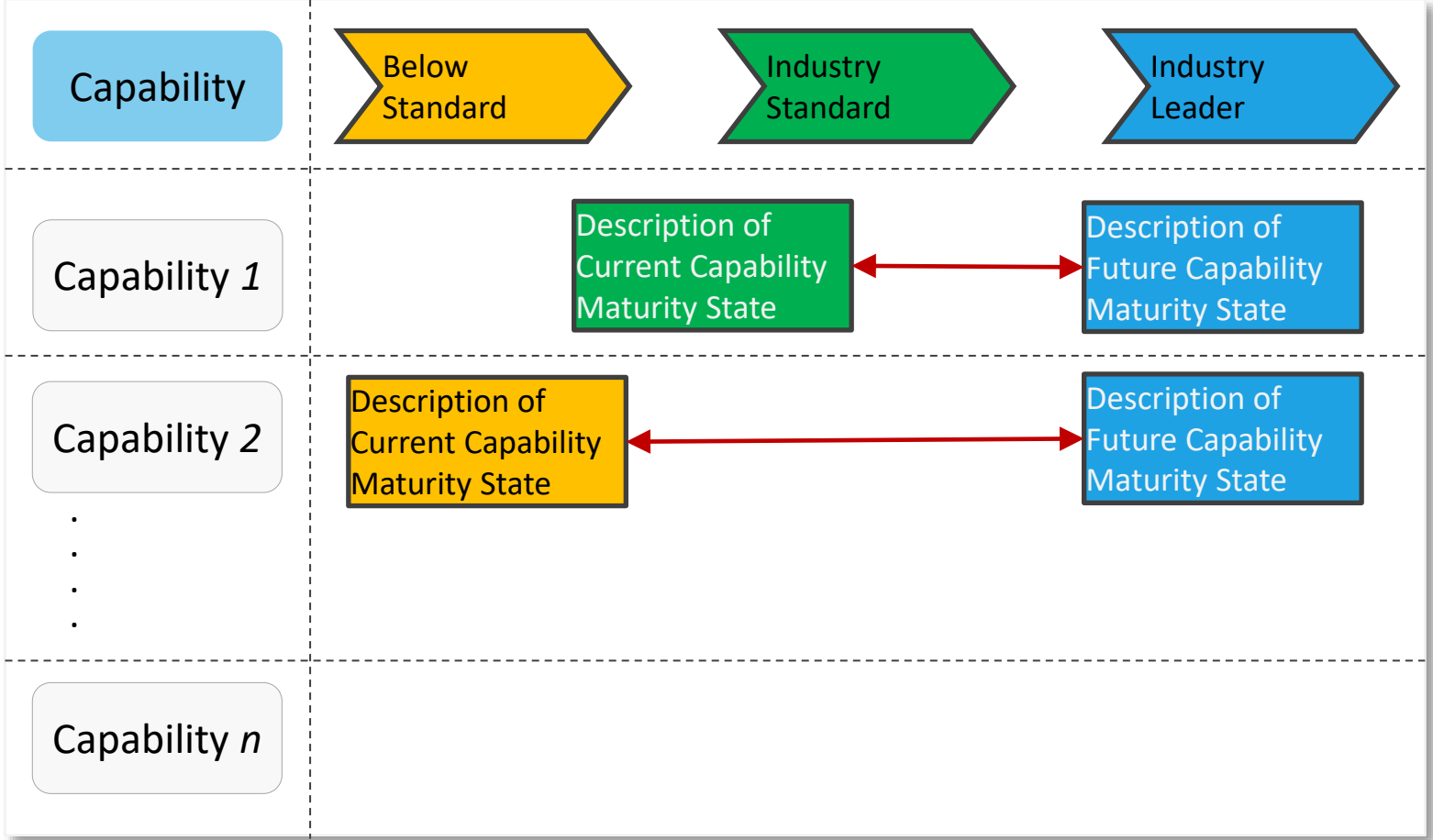
# Capability Model

## *Differentiating Capabilities*

### Maturity Evaluation



### Maturity Assessment

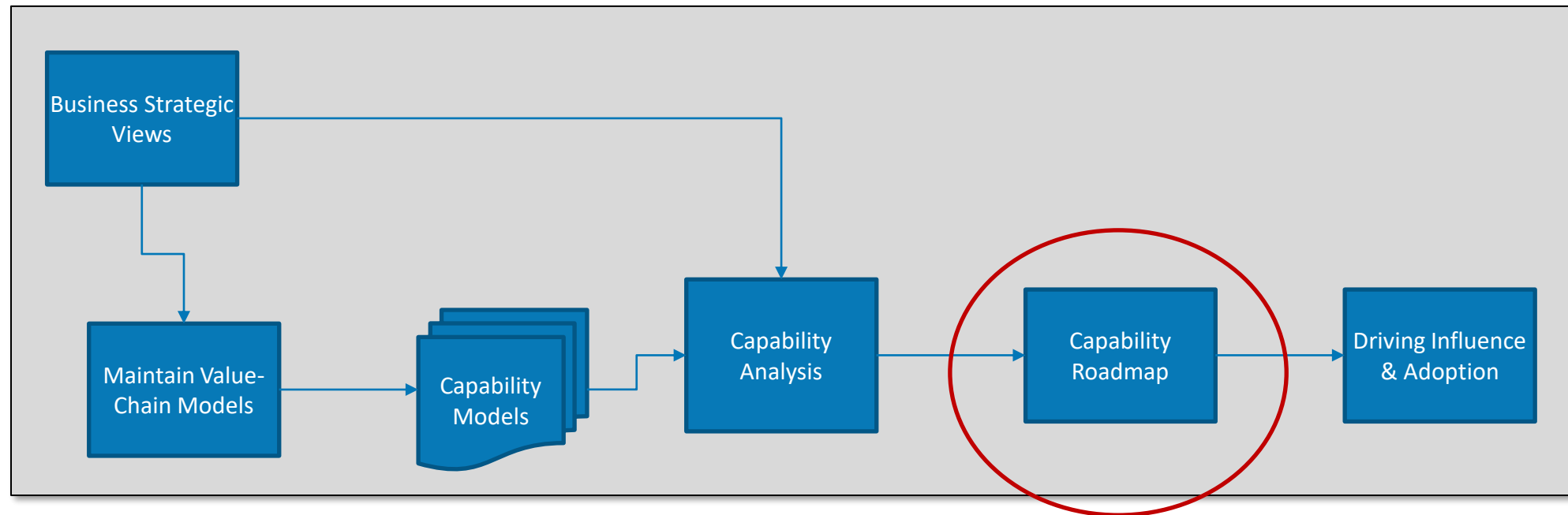


←→ Gap Closure via Tactical Activities

# Conceptual Model For Building Roadmaps

## *Capability Roadmap*

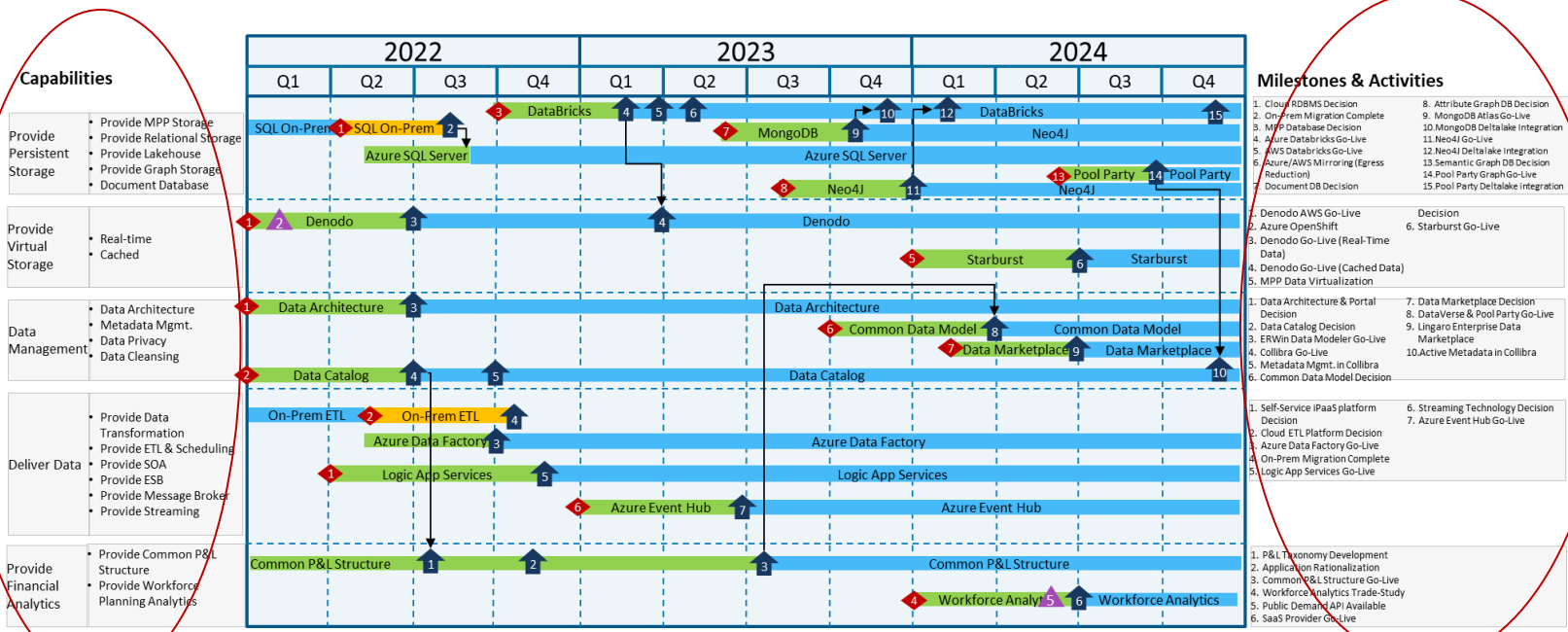
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# Capability Roadmap

## Key Elements

Layer 1 & 2 from Capability Model



Work Packages & Investments Needed

### Tactical Elements

- Firm Commitments
- Funded & Agreed

### Strategic Elements

- Should feel "uncomfortable"
- Uncertain & will likely evolve
- Typically drives conversations about change

# Chief Data Office Roadmap

## Fictional Example

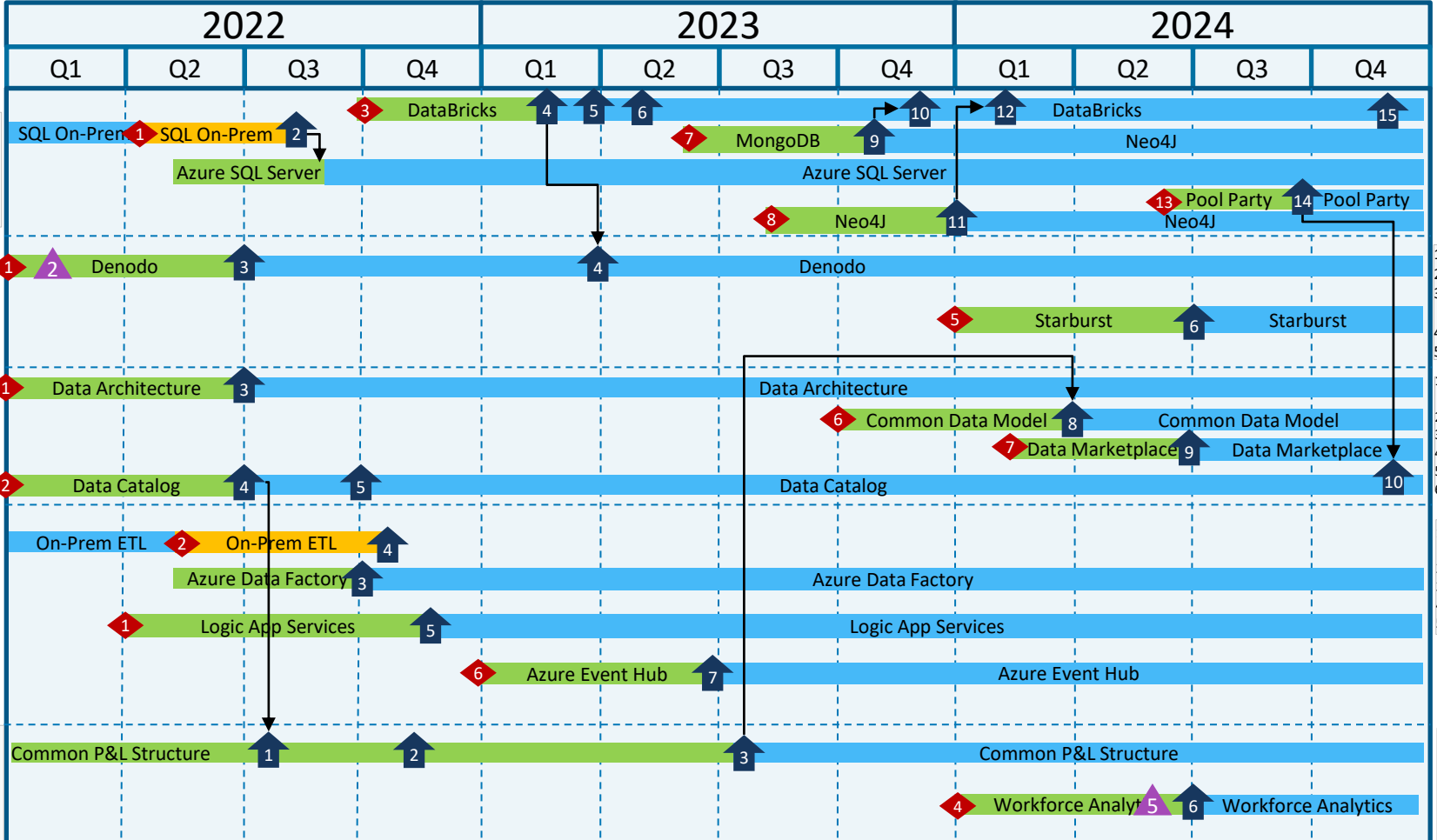
### Legend

-  Milestone
-  Decision
-  External Dependency

Development
Production
Retire

### Capabilities

- Provide Persistent Storage**
  - Provide MPP Storage
  - Provide Relational Storage
  - Provide Lakehouse
  - Provide Graph Storage
  - Document Database
- Provide Virtual Storage**
  - Real-time
  - Cached
- Data Management**
  - Data Architecture
  - Metadata Mgmt.
  - Data Privacy
  - Data Cleansing
- Deliver Data**
  - Provide Data Transformation
  - Provide ETL & Scheduling
  - Provide SOA
  - Provide ESB
  - Provide Message Broker
  - Provide Streaming
- Provide Financial Analytics**
  - Provide Common P&L Structure
  - Provide Workforce Planning Analytics



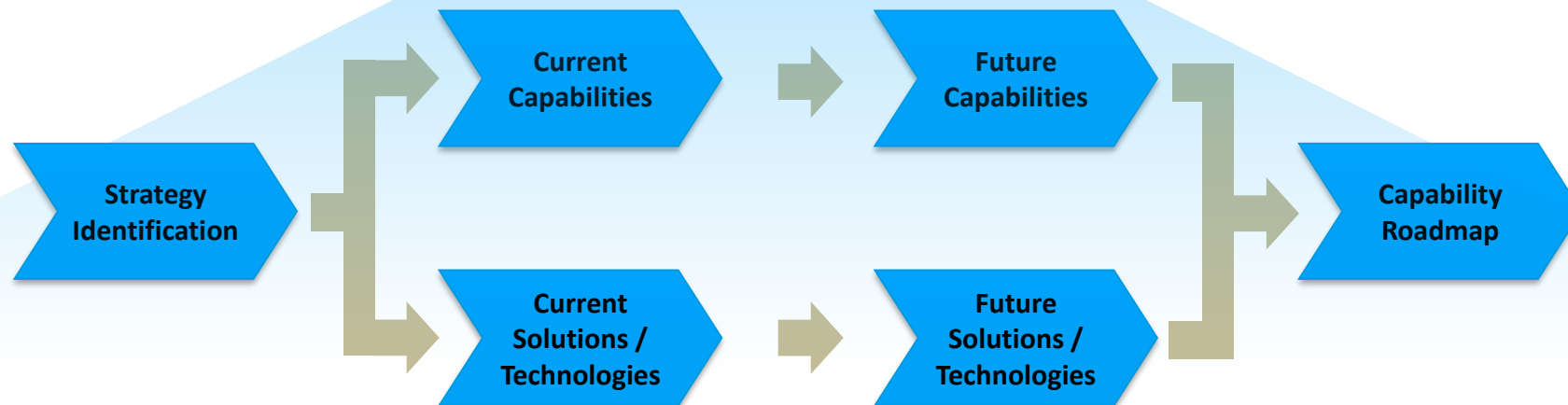
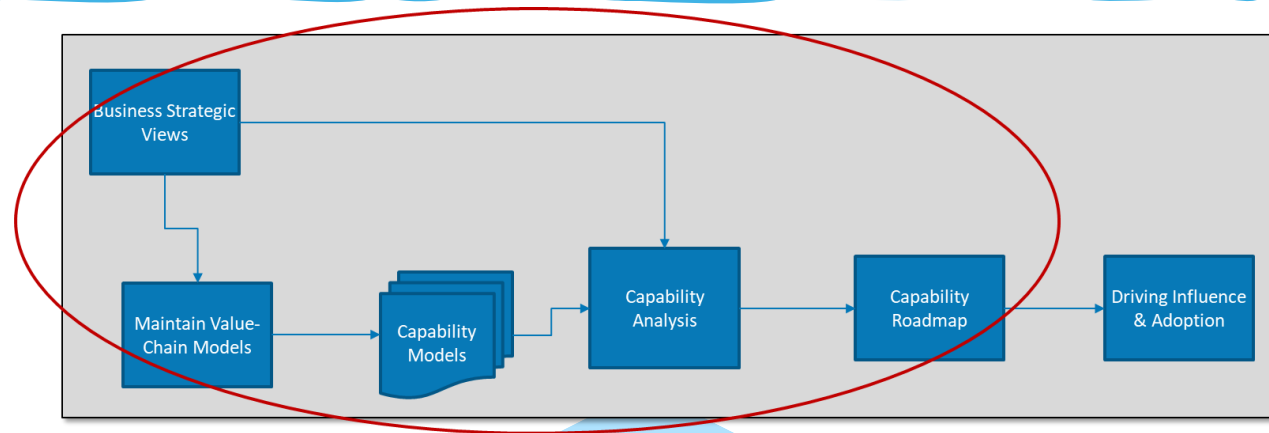
### Milestones & Activities

- |                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"> <li>1. Cloud RDBMS Decision</li> <li>2. On-Prem Migration Complete</li> <li>3. MPP Database Decision</li> <li>4. Azure Databricks Go-Live</li> <li>5. AWS Databricks Go-Live</li> <li>6. Azure/AWS Mirroring (Egress Reduction)</li> <li>7. Document DB Decision</li> </ol> | <ol style="list-style-type: none"> <li>8. Attribute Graph DB Decision</li> <li>9. MongoDB Atlas Go-Live</li> <li>10. MongoDB Deltalake Integration</li> <li>11. Neo4J Go-Live</li> <li>12. Neo4J Deltalake Integration</li> <li>13. Semantic Graph DB Decision</li> <li>14. Pool Party Graph Go-Live</li> <li>15. Pool Party Deltalake integration</li> </ol> |
| <ol style="list-style-type: none"> <li>1. Denodo AWS Go-Live</li> <li>2. Azure OpenShift</li> <li>3. Denodo Go-Live (Real-Time Data)</li> <li>4. Denodo Go-Live (Cached Data)</li> <li>5. MPP Data Virtualization</li> </ol>                                                                                   | <ol style="list-style-type: none"> <li>6. Starburst Go-Live</li> </ol>                                                                                                                                                                                                                                                                                        |
| <ol style="list-style-type: none"> <li>1. Data Architecture &amp; Portal Decision</li> <li>2. Data Catalog Decision</li> <li>3. ERWin Data Modeler Go-Live</li> <li>4. Collibra Go-Live</li> <li>5. Metadata Mgmt. in Collibra</li> <li>6. Common Data Model Decision</li> </ol>                               | <ol style="list-style-type: none"> <li>7. Data Marketplace Decision</li> <li>8. DataVerse &amp; Pool Party Go-Live</li> <li>9. Lingaro Enterprise Data Marketplace</li> <li>10. Active Metadata in Collibra</li> </ol>                                                                                                                                        |
| <ol style="list-style-type: none"> <li>1. Self-Service iPaaS platform Decision</li> <li>2. Cloud ETL Platform Decision</li> <li>3. Azure Data Factory Go-Live</li> <li>4. On-Prem Migration Complete</li> <li>5. Logic App Services Go-Live</li> </ol>                                                         | <ol style="list-style-type: none"> <li>6. Streaming Technology Decision</li> <li>7. Azure Event Hub Go-Live</li> </ol>                                                                                                                                                                                                                                        |
| <ol style="list-style-type: none"> <li>1. P&amp;L Taxonomy Development</li> <li>2. Application Rationalization</li> <li>3. Common P&amp;L Structure Go-Live</li> <li>4. Workforce Analytics Trade-Study</li> <li>5. Public Demand API Available</li> <li>6. SaaS Provider Go-Live</li> </ol>                   |                                                                                                                                                                                                                                                                                                                                                               |



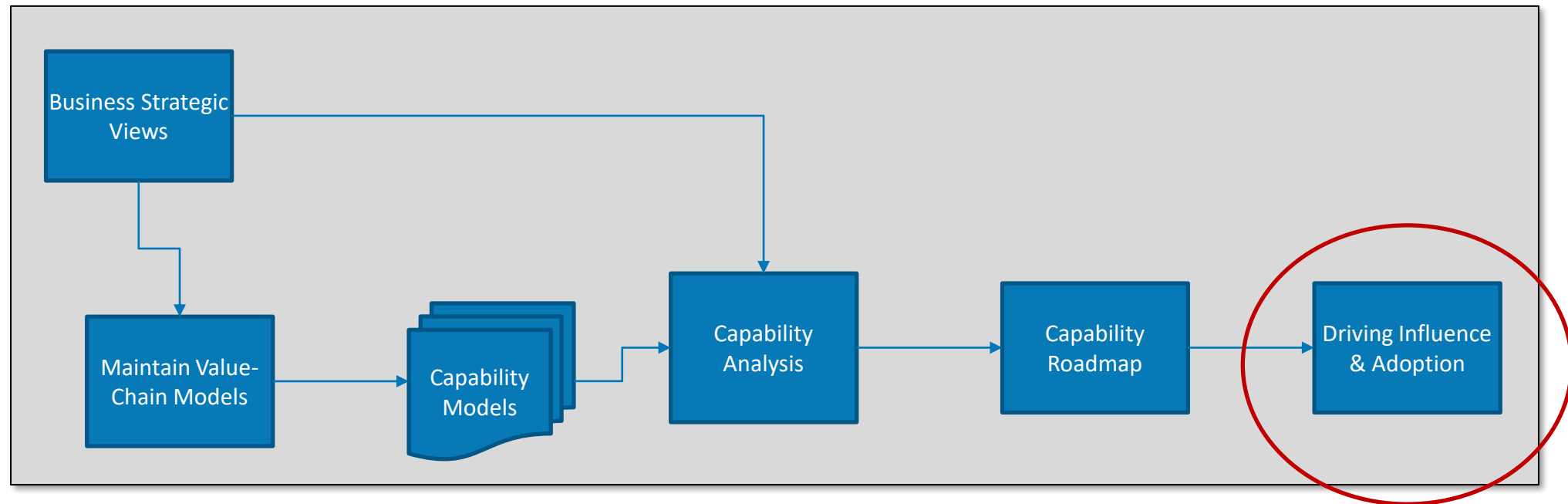
# Conceptual Model For Building Roadmaps

## *Summary of Capabilities & Roadmap*



# Conceptual Model For Building Roadmaps

## *Driving Influence and Adoption*



# Conceptual Model For Building Roadmaps

## *Tips for Influence & Adoption*

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Become a trusted advisor

Listen and understand before attempted persuasion

Leverage Connections / Build a coalition

Be mindful of your communication (Body Language, Tone, etc.)

Have deep expertise

Ensure critical Items are addressed

Be OK with being told – “that’s unachievable”



# Strategic Roadmaps

## *Summary*

- ✓ Excel at both Strategy & Operations / Execution
- ✓ Ensure the Entire Team Understands the Vision, Strategy, and how their Contribution enables successful execution
- ✓ Identify Distinguishing & Market Leading Capabilities
- ✓ Enterprise Architecture tools assist in capturing the complexity of the underlying data
- ✓ As part of Roadmap Advocacy, ensure influence techniques are leveraged

