Building an Impactful Strategic Roadmap

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Nov 10, 2022
Agenda & Goals of this Session

- Impactful Strategic Roadmaps
- A Conceptual Model for Building Roadmaps
- Developing a Business Strategy
- Value-Stream Assessment
- Capability Modeling & Analysis
- Roadmap Development & Example
- Influence & Adoption
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.

<table>
<thead>
<tr>
<th>Impactful Roadmaps</th>
<th>Creation &amp; Maintenance</th>
<th>Communication</th>
<th>Use</th>
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<tbody>
<tr>
<td></td>
<td>Accurate</td>
<td>Consumable</td>
<td>Aligned</td>
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<td></td>
<td>Repeatable</td>
<td>Accessible</td>
<td>Complete</td>
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<td></td>
<td>Maintained</td>
<td>Properly Scoped</td>
<td>Connected</td>
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<td></td>
<td>Traceable</td>
<td>Measurable</td>
<td>Contextualized</td>
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<td>Multi-Year</td>
<td>Integrated</td>
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<td>Adaptable</td>
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**Common Problems**

- Too Tactical
- No Standardization
- Too Strategic
- Unclear Dependencies

Image Source: Jibility
Conceptual Model For Building Roadmaps

Business Strategy Views

- Business Strategic Views
- Maintain Value-Chain Models
- Capability Models
- Capability Analysis
- Capability Roadmap
- Driving Influence & Adoption
Business Strategic Views

Developing the strategy

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

- Defining the Mission/Objectives of the Organization
- Holistic Analysis of internal/external environment
- Derive Strategy Definition

Strategy

- Vision
- Mission
- Objectives
- Goals
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:
- [Link](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

And / Or

Business Outcome Journey Map

Value Stream

Marketing
Sales
Service Delivery
Support

Goals / Outcomes

- Increase Market Share by 10%
- Increase ...
- 90% Customers return ...
- 95% Customer Satisfaction
- 99.9995% SLA

Value Propositions

- Best-in-class services ...
- Industry leader in ...

Capabilities

- Campaign Mgmt
- Channel Mgmt
- Brand Mgmt

Step 1: Identify Primary/Supporting Activities

Step 2: Determine Cost & Value of Activities

Step 3: Identify Opportunities for Competitive Advantage
Conceptual Model For Building Roadmaps

Capabilities
Capability Model
Overview & Example

Core Capabilities
- Marketing
  - Advertising
  - Brand Management
- Sales
  - Lead Management
  - Sales Planning
  - Underwriting
- Product Development
  - Lead Management
  - Sales Planning
  - Underwriting
- Engineering
  - Provide Electrical Engineering
  - Wiring Harness Design

Supporting Capabilities
- Human Resources
  - Manage Human Capital
  - Manage Employee Comms
- Finance
  - Perform General Accounting
  - Perform Revenue Mgmt.
- IT
  - Manage Enterprise Information
  - Deliver / Support IT Services

Assessment Scores
Maturity: n
Importance: n
Adaptability: n
Maturity Evaluation

Below Industry
- Capabilities do not support Business Needs

Industry Standard
- Capabilities are on par with competitors

Industry Leader
- Capabilities influence the direction of the industry

Maturity Assessment

<table>
<thead>
<tr>
<th>Capability</th>
<th>Below Standard</th>
<th>Industry Standard</th>
<th>Industry Leader</th>
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<tbody>
<tr>
<td>Capability 1</td>
<td>Description of Current Capability Maturity State</td>
<td>Description of Future Capability Maturity State</td>
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<tr>
<td>Capability 2</td>
<td>Description of Current Capability Maturity State</td>
<td>Description of Future Capability Maturity State</td>
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Gap Closure via Tactical Activities
Conceptual Model For Building Roadmaps

Capability Roadmap

- Business Strategic Views
- Maintain Value-Chain Models
- Capability Models
- Capability Analysis
- Capability Roadmap
- Driving Influence & Adoption
- Driving Influence & Adoption
Capability Roadmap

Key Elements

Layer 1 & 2 from Capability Model

Tactical Elements
- Firm Commitments
- Funded & Agreed

Strategic Elements
- Should feel “uncomfortable”
- Uncertain & will likely evolve
- Typically drives conversations about change

Work Packages & Investments Needed

Milestones & Activities
- Q1
  - Capability Model
  - Work Packages & Investments
- Q2
  - Capability Model
  - Work Packages & Investments
- Q3
  - Capability Model
  - Work Packages & Investments
- Q4
  - Capability Model
  - Work Packages & Investments

2022
- Q1
  - Provide MFP almacen
  - Provide Virtual Network
- Q2
  - Provide Storage
  - Provide Data Management
- Q3
  - Provide Workforce Planning Analytics

2023
- Q1
  - Provide MFP almacen
  - Provide Virtual Network
- Q2
  - Provide Storage
  - Provide Data Management
- Q3
  - Provide Workforce Planning Analytics

2024
- Q1
  - Provide MFP almacen
  - Provide Virtual Network
- Q2
  - Provide Storage
  - Provide Data Management
- Q3
  - Provide Workforce Planning Analytics

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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

- 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