



Your Company's Roadmap

Where Are You Now?



Getting Started With Your Company's Roadmap

[Leader's Edition]



Starting Your Successful Discovery

Why does this matter?

Every company leader has a mental picture of what success looks like for their organization. Taking a step back from the day-to-day to reflect on the long-term direction is something they don't do as often as they should. As a result, the future becomes unclear, and the roadmap is lost.

Making thoughtful decisions about the systems, processes, people and technologies that collectively create the company's sound infrastructure benefits from strategic thinking time. This is where the Where Are You Now Discovery begins.

Who should participate?

Involving the team you depend on to execute the company's vision should be a part of this exercise. Every company is different so there is no one right way to assemble this strategic group. It might be a small internal group. Or maybe you've built an outside peer group. You know who those valuable, trusted folks are and how they contribute to the overall direction.

What will you gain from this thought exercise?

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At the end of this discovery, you will have a clearer picture of your future vision, where you are now in relation to it, and how you want to move ahead. You'll be eager to start shaping your company's roadmap.

Again, there is no one right outcome because no two companies are alike. What you and your team gain from this is in direct proportion to the careful consideration you give to each of these points.

With your fresh new valuable insights, you'll be ready to outline your company's unique strategic roadmap. We'll guide you through the steps to help you organize, prioritize, and plan realistic activities that work for you and your team. Because companies change there are no rigid, you have to follow these steps rules. A roadmap is flexible and changeable – just like every company and its leaders are.

Let's dive in!

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Part 1: Company Overview and Strategic Goals

Introduction

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1. Please provide a brief overview of your company - what you do, how long you've been in business, number of employees, etc.

2. What industries, markets, and company size do you serve?

3. What is your current position in the market, and who are your main competitors?

4. How do you differentiate yourself in ways that customers measure?

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5. Have you noticed any shifts or changes in your ideal market recently?

6. What are your top 3 priorities as a business right now?

7. What are the top three strategic goals in the next 1-3 years?

8. What are the key strategic challenges your company is facing in achieving your goals?

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9. What does success look like for your company in the next 3-5 years?

10. How do you measure success for your business (KPIs, metrics, etc)?

11. What are 3 successes you've experienced in the past year that you're most proud of?

12. What are some challenges or roadblocks impacting business growth currently?

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13. How would you describe your company culture and values?

14. What does your organizational structure look like?

15. What partnerships or integrations with other companies do you rely on?

16. How do you generate new business and attract customers currently?

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17. What are your expansion plans - new products, services, acquisitions, locations, markets, etc?

18. What regulatory or compliance requirements does your business need to meet?

19. How do you handle things like supply chain, logistics, fulfillment?

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20. How is performance management handled for your employees?

21. If time and money weren't factors, what would you like to change, fix, or tackle?

Financial Health and Management

1. Financial Performance: How would you describe the current financial health of the company?

2. Revenue Streams: What are your major revenue streams, and how have they evolved over time?

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3. Cost Management: What are your most significant costs, and how are you managing them?

4. Operational Efficiency and Challenges

5. Are there any operational processes that you believe are particularly efficient?

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6. What processes do you believe need improvement?

7. How does your company approach team development and talent development?

Innovation and Market Trends

1. How does your company approach innovation?

2. How does your company stay abreast of and respond to market trends and shifts?

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Expectations and Future Vision

1. What is your long-term vision for the company?

2. What do you expect from your partnerships (technology, supply chain, etc.) in terms of supporting your business goals?

Wrapping It Up

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Is there any other information you think is crucial for us to understand about your business?

Part 2: Looking More Closely at Your Technology Infrastructure

Current State Assessment

1. How would you describe your current technology infrastructure? What systems and tools are you using? Consider hardware, software, networks, cloud services.

2. What is your physical work environment? Everyone in the office, all work from home, hybrid, remote worksites.

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3. What parts of your technology infrastructure are working well and supporting your business goals?

4. What pain points or limitations exist with your current technology tools and services?

5. How satisfied are you with the depth and scope of your team's skills?

6. What skills or roles would you like to fill?

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7. How could your current technology better support your overall business priorities and growth plans?

8. Do you have any immediate technology needs or problems we could help solve?

9. What has been your recent and planned investment in technology (budget, major projects)?

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10. Who are your key technology vendors and partners, and how do they support your infrastructure?

11. Are there any long-term technology concerns or limitations that you foresee impacting your business goals?

12. How has your organization responded to past technology changes or upgrades?

Technology and Business Alignment

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1. How well does your current technology infrastructure align with your business goals?

2. How do you use data and analytics in decision-making? Are there any gaps or challenges in this area?

3. How would you rate your company's cybersecurity preparation and policies?

Future Expectations and Plans

1. What is your vision for the role of technology in your company's future?

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2. What are your future plans and priorities when it comes to technology investments and upgrades?

3. Are there any new systems, tools, or capabilities you want to implement?

4. Are there any specific technology trends or innovations you are particularly interested in exploring?

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5. How could technology enable innovation for new products, services, or business models?

6. What technology challenges or barriers may impact your future plans?

7. What are your key expectations from a technology partner in terms of support, innovation, and collaboration?

Decision Process

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1. Who are the key stakeholders involved in technology decisions?

2. What process do you follow for evaluating and selecting technology solutions?

3. Do you have a technology budget allocated? If so, what is the budget range?

4. What timeline are you operating within for making technology changes?

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Next Step

You've uncovered a wealth of valuable information and insights you likely weren't expecting. Too much information can be overwhelming. Where to start? What's important? How do we turn this into meaningful actions that deliver a measurable outcome?

Every company is different. It's unrealistic to expect that every action item will be checked off your list. Some items are nice to have. Some are urgent and need to be addressed as quickly as possible. Most will fall somewhere in the middle.

We've created an Excel template that will help you organize, prioritize, and plan. Here are some tips to help you get started.

- ☐ Plan an uninterrupted time for you and your leadership team to review what you've uncovered.
- ☐ Invite your team members to a separate session. Share these insights with them. Ask for their input and encourage them to actively participate. Make this a collaborative session, not a one-way presentation.
- ☐ Identify the priorities. There will be more unexplored opportunities and potential problems than you anticipated. This is a positive outcome so don't become overwhelmed or discouraged by the wealth of information uncovered.
- ☐ Consider short term must-haves, the day-to-day support items that are currently getting in the way of meeting your objectives.
- ☐ Identify how the short-term obstacles impact the long-term objectives.

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- ☐ Don't be afraid to fill a few whiteboards even though the picture may seem unclear at first. This is where the dots start to connect.
- ☐ Resist premature solutions at this point. Agree that you will conduct a complete technology assessment before any final IT decisions are made. You will reduce the chances of unnecessary purchases and hiring that won't serve your long-term goals.
- ☐ Most importantly, remember that plans can, and should, change. For this reason, include regular discovery sessions in your company, reexamine your priorities, and give yourself permission to let go of action items that no longer matter.

Grab your Strategic Roadmap Action Plan Template included in your membership to start planning. Use this template as a guide and make the changes that are right for your company. This is where the discovery and actions come together to deliver the outcomes you deserve.

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If you would like an unbiased partner to help you get started or contribute to your plan, we're ready to dive in with you. Let's talk and see how we can put all of your valuable new ideas into action.



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