



REDWOOD ADVISORS

**Transformational
Programs**

*Track and drive progress on your
most important strategic goals
and initiatives with in-depth
coaching and mgmt. support*

Transformational Programs establish and implement best-in-class systems and gov. structures to track and drive progress on top initiatives

Stand-up and run a transformational program focused on delivering your company's top strategic initiatives; effort includes building-out and standing-up a best-practice performance management system, governance model (e.g., monthly executive meetings, initiative meetings) and ongoing, in-depth coaching and support to executives and top initiative owners

Transformational Programs address:

- Who is responsible for delivering on each top initiative?
- What is the expected impact of each top initiative and when will it be realized?
- How can your team best track and drive progress on your portfolio of initiatives over time?
- What meeting and agenda will your team use to consistently to monitor performance?

- **Smooth and accelerate progress toward your top strategic goals** by articulating initiative charters, owners, and OKRs (e.g., targets, KPIs)
- **Increase accountability and transparency into top initiatives** by developing and filling out best-in-class dashboards
- **Uncover and resolve key issues early** with problem solving support & best-practice mtg. processes (e.g., cadence, agendas)
- **Surface new opportunities for growth and make key decisions** by regularly convening core initiative teams with structured, best-in-class governance meetings
- **Accelerate near-term action** to drive progress on overall goals
- **Drive strategic thinking and increase team rigor** with targeted problem-solving support and coaching
- **Maintain momentum toward and team alignment on your strategic goals** by developing, kicking-off, and implementing clear, efficient governance structures
- **Reduce management burden and keep initiatives on-track over time** with regular, facilitated executive meetings

Transformational Programs: Process Overview

Phase	Governance model design	Supporting dashboard creation	Initiative-level operating plans	Ongoing executive meetings
Key goal	<ul style="list-style-type: none"> Develop a best-in-class governance system to efficiently monitor and align on top goals 	<ul style="list-style-type: none"> Develop dashboards to clearly capture and communicate initiative progress 	<ul style="list-style-type: none"> Develop a concrete plan for delivering on top initiative goals 	<ul style="list-style-type: none"> Ensure effective, ongoing delivery of strategic goals
Key outputs	<ul style="list-style-type: none"> Best-practice governance structure 	<ul style="list-style-type: none"> 1-page dashboard for all initiatives 	<ul style="list-style-type: none"> Clear initiative goals (e.g., financial, op.) with owners & timeline 	<ul style="list-style-type: none"> High-value executive meetings and conversations
Key activities	<ul style="list-style-type: none"> Codify current governance meetings Develop gov. roles (e.g., exec. sponsor, overall program manager) Create ~2-3 governance meetings with agendas, goals, scopes, cadence, attendees, etc. 	<ul style="list-style-type: none"> Develop a 1-page dashboard template Set owner per initiative (e.g., Responsible, Accountable) Work with initiative owners to stress-test thinking and goals Build out dashboards Drive initiative owners to think strategically with targeted coaching 	<ul style="list-style-type: none"> Review and refine the top strategic goals and stress-test their targets Work with initiative owners to build out an operating plan (e.g., RASCI, milestones, resource needs) 	<ul style="list-style-type: none"> Prepare initiative owners for governance meetings Run first gov. meeting Capture and share next steps from gov. meetings Run ongoing executive meetings Modify mtgs., agenda, owners, dashboards, etc. as helpful

