1. Problem/Opportunity (the “why”):
2. Strategy, Objective, Goal This Initiative Supports:
3. Background Information:
4. Alternatives Considered:
5. Recommended Solution (the “what”):

1. Key Assumptions, Risks:
2. This Initiative Materially Impacts or Requires Non-Trivial Changes to Our:

|  |  |  |  |
| --- | --- | --- | --- |
| 🞎 Strategy | 🞎 Clients | 🞎 Systems | 🞎 Skills |
| 🞎 Offerings | 🞎 Partners | 🞎 Processes | 🞎 Roles |
| 🞎 Channels | 🞎 Budgets | 🞎 Equip, Facilities | 🞎 Incentives |

1. Resources Required:
2. Impact - Increased Revenues, Decreased Expenses, or Other Justification:

1. Implementation Plan (the “how”):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **✓** | **Milestones and Key Tasks** | **Owner** | **Due Date** | **Comments** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. Problem/Opportunity (the “why”): [describe problem to be solved or opportunity to be leveraged]
2. Strategy, Objective, Goal This Initiative Supports: [e.g. geo expansion, increase productivity]
3. Background Information: [provide supporting/historical information that gives context]
4. Alternatives Considered: [list any other solution options considered or tried]
5. Recommended Solution (the “what”): [describe planned/proposed solution]

1. Key Assumptions, Risks: [beliefs/data on which solution is based that might change]
2. This Initiative Materially Impacts or Requires Non-Trivial Changes to Our:

|  |  |  |  |
| --- | --- | --- | --- |
| 🞎 Strategy | 🞎 Clients | 🞎 Systems | 🞎 Skills |
| 🞎 Offerings | 🞎 Partners | 🞎 Processes | 🞎 Roles |
| 🞎 Channels | 🞎 Budgets | 🞎 Equip, Facilities | 🞎 Incentives |

1. Resources Required: [headcount, capex, opex]
2. Impact - Increased Revenues, Decreased Costs or Other Justification: [expected payback, ROI, other benefits]

1. Implementation Plan (the “how”):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **✓** | **Milestones and Key Tasks** | **Owner** | **Due Date** | **Comments** |
|  |  |  |  |  |
|  | **[Milestone 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_]** |  |  |  |
|  | * [Key Task 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_] |  |  |  |
|  | * [Key Task 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_] |  |  |  |
|  | * [Key Task 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_] |  |  |  |
|  |  |  |  |  |
|  | **[Milestone 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_]** |  |  |  |
|  | * [Key Task 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_] |  |  |  |
|  | * [Key Task 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_] |  |  |  |
|  | * [Key Task 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_] |  |  |  |
|  |  |  |  |  |

**Notes:**

1. Start each milestone and task description with a verb to ensure they are clear and actionable.
2. End the list of tasks within each milestone with a task that makes clear what is required for that milestone to be completed such as with the creation of a deliverable or the receipt of an approval.
3. Ensure there is one clear owner for each task. Include those who contribute to the task in the task description or comments.
4. For initiatives involving change, include change management best practices such as:
   1. Involve early and gain buy-in from those expected to support the change.
   2. Track progress and keep stakeholders informed.
   3. Provide training, support, and other resources required to achieve success.
   4. Ensure strategies, systems, processes, responsibilities, and incentives are in alignment.