Phase 1: Setting Objectives

Write down the problems you are looking to solve through an end-to-end analysis. It is important to understand your objective/ideal state before you get started so you can focus your efforts on achieving the end goal.

Problem	**My organization's problem is…**	**This needs to be addressed because…**	**My ideal state once I solve the problem is…**
Example	*Our current tool for tracking leaves internally is insufficient*	*The inability to track federal and state leaves accurately is presenting a compliance risk*	*A robust technology solution that allows us to track leaves effectively and accurately*
1)			
2)			
3)			

Phase 2: Key Stakeholders

Write down the key stakeholders you need to engage in the end-to-end review. Ensure you are considering both direct and indirect stakeholders who may be impacted by the processes you are reviewing even if they are not immediately involved in them.

Stakeholder	**Name**	**Functional Area**	**Role**
Example	*Jane Smith*	*Payroll Specialist*	*Responsible for paying leave and disability correctly. Requires direct input from TPA.*
1)			
2)			
3)			

Phase 3: Technology Ecosystem

Answer these questions to lay the foundation for your Technology Ecosystem.

1. What is the primary leave status system?

2. What types of leaves and leave status information is tracked?

3. What downstream impacts are in place based on an update or change to a leave type and/or status?

4. Is information manually updated? Is there a file in place?

5. If there is a file in place, is it an API? Is it a daily or weekly file?

6. Are there any integrations in place with a leave/disability vendor?

Phase 5: Strategic Roadmap Template

Use this template to plan and communicate strategic initiatives. Focus columns on clear owners, timelines, dependencies, and roadblocks so stakeholders can act quickly.

Example Roadmap:

Initiative	Objective	Timeline (Start–End)	Key Milestones & Dates	Owner / Lead	Dependencies (internal/external)	Roadblocks / Risks	Mitigation / Actions	Status	Priority	Notes / Comments
Example: Implement a Leave Planning Tool	Reduce reliance on the LOA team by enabling employees to plan their leaves via a self-service tool	Implementation: 1/1/27-6/30/27 Go Live: 7/1/27	1) Requirements complete: 1/15/27 2) Implementation Kick Off: 2/1/27 3) Launch: 7/1/27	Jane Doe, PM	Vendor integration (API), IT security review, Data mapping resource	Delay in vendor API delivery; leave data mapping complexity	1) Escalate API SLA and add buffer	In Progress	High	Align with Customer Ops roadmap

Column guidance:

- Initiative: Short, descriptive title.
- Objective: Measurable outcome tied to business goals (OKR/KPI where possible).
- Timeline: Clear start and end dates; if iterative, note phases.
- Key Milestones & Dates: Major checkpoints for governance and go/no-go decisions.
- Owner / Lead: Single accountable person and supporting team.
- Dependencies: Explicitly list internal teams, external vendors, regulatory approvals, budget decisions, technology components, data feeds, or other projects.
- Roadblocks / Risks: Concrete obstacles you anticipate (resourcing gaps, vendor delays, technical constraints, compliance issues, budget cuts, stakeholder alignment). Assign a risk rating if useful (Low/Med/High).
- Mitigation / Actions: Specific steps, owners, and target dates to remove or reduce each roadblock.
- Status: Proposed options: Not started / On track / At risk / Delayed / Complete.
- Priority: High / Medium / Low (or numerical 1–5).
- Notes / Comments: Meeting links, decisions needed, escalation contacts.

Suggested views:

- Executive summary: Filter to High priority + At risk for leadership reviews.
- Dependency map: Visualize dependencies across initiatives (swimlanes or dependency graph).
- Timeline/Gantt view: Convert milestones to a Gantt chart to show overlaps and critical path.

Quick checklist before governance review:

- All dependencies have named owners and dates.
- Roadblocks include a proposed mitigation and assigned owner.
- Timeline includes contingency buffers for external dependencies.
- Priority aligns to available budget and resource plans.