



rego consulting

Let Rego Be Your Guide

workfront



# Workfront Align

## Align Strategy, Goals, and Work to Accelerate Delivery Across the Enterprise



Is your organization struggling to keep employees focused on key initiatives? Are you looking for an easy way to provide measurable business outcomes?

Now, more than ever, maintaining strategic agility requires aligning your goals and your work within a single technology platform. Workfront Align empowers you to do just that. It is a strategic planning tool that allows organizations to set and cascade goals – from sub-goals down to Projects. Linked Projects automatically update the status of the goal, ensuring transparency and strategic alignment across multiple levels of your organization, so teams can get their best work done.

Rego Consulting offers two off-the-shelf implementation packages for Workfront Align, tailored to deliver maximum value to your unique business needs. We also offer a third-tier, customized for you and tailored to embed strategic agility into the fabric of your organization.



### Align Tier One – Ready, Set, Plan

You already have a robust strategic planning process in place and it's working well – you just need to connect it to the work. We'll review your process, design an implementation approach, and set up your 2021 Planning Infrastructure inside Workfront Align. You can be up and running within three to four weeks, with all projects leveling up to strategic goals.

- Define objectives and hold leadership kick-off (2 hours)
- Strategic planning process review and mapping (8 hours)
- Workfront Align design and documentation (6 hours)
- Review client-provided documentation on Workfront Project Structures (2 hours)
- Update and provide mapping template that enables you to map Workfront Project types to Align Goals (0 hours)
- Validate mapping template against strategic planning process review (2 hours)
- Workfront Align configuration and 2021 Planning Infrastructure setup (8 hours)
- Train the Trainer – design training and deliver to master trainers for roll-out (6 hours)
- One round of adjustments based on client-run user acceptance training (UAT) (4 hours)
- Provide post-launch coaching and support (2 hours)

### Logistics

**Scope:**  
One Leadership Team /  
Planning Group

**Hours:**  
40

**Price:**  
\$7,400



## Align Tier Two – Strategy Architecture

You have some strategic planning in place, but it's either ad hoc or falling short of your expectations. We will start by reviewing your organization's vision and business goals. Next, we'll work with you to craft a planning approach that effectively cascades to the critical Projects that will drive your business forward. Within eight to twelve weeks, you'll be delivering – and tracking – strategically aligned work.

- **Define Vision and Objectives (6 Hours):** Work with leaders to determine objectives, scope, and develop a unified vision for strategic goal setting and planning for the organization.
- **Conduct Discovery Sessions (12 Hours):** Conduct work sessions and interviews for:
  - Organizational discovery to identify business strategies, organizational structures, overall workflows, key stakeholders, and critical goals to ensure alignment.
  - Goal setting and planning discovery to discuss current planning processes, determine goal setting and planning maturity, and identify gaps, needs, and opportunities for change.
- **Define a New Strategic Goal Setting and Planning Process (16 Hours):** Based on the assessments, we will make best practice recommendations for implementing your new strategic planning process.
- **Configure Workfront and Workfront Align (30 Hours):** Design and configure Workfront Align to support the new Planning Process. This stage also includes assessing the current Workfront configuration, defining any needed changes, and executing an approved design.
- **Roll-out with a Focus on Adoption:**
  - **Conduct Impact Assessment (16 Hours):** Assess the impact of changes to organizational units to surface critical focus areas for effective transition planning and training.
  - **Develop a Phased Roll-out Strategy (4 Hours):** Based on the Impact Assessment, develop a transition plan focused on ensuring adoption and implementing iterations to enable phased learning and adapting. The approach involves launching a pilot phase with an initial super-user group with basic training and feedback reviews to inform future phases. These phases roll out in waves across cross-functional teams.
  - **Launch Communication Plan (6 Hours):** Develop and execute a communications plan, including general announcements, all-hands or staff meeting presentations, and cadence recommendations for effective communication leading up to, during, and after the transition.
  - **Create Training and Reference Documentation (15 Hours):** Develop customized training and reference material to help leaders and organizational units learn processes and behaviors to execute the new approach.
  - **Training and Coaching for Adoption (60 Hours):** Based on the Impact Assessment and Layout Template work, develop and deliver training to the entire organization. This includes targeted coaching to individuals and/or teams as needed to help accelerate learning and any needed adaptation.
- **Post-launch Review, Coaching, and Support (25 Hours):** Conduct post-launch review with leaders and pilot team. Provide coaching, training and troubleshooting as needed to leaders, teams, and/or individuals to ensure a smooth transition and address any questions or concerns.

### Logistics

**Scope:**  
Leadership Team + 200 people

**Hours:**  
190

**Price:**  
\$35,150



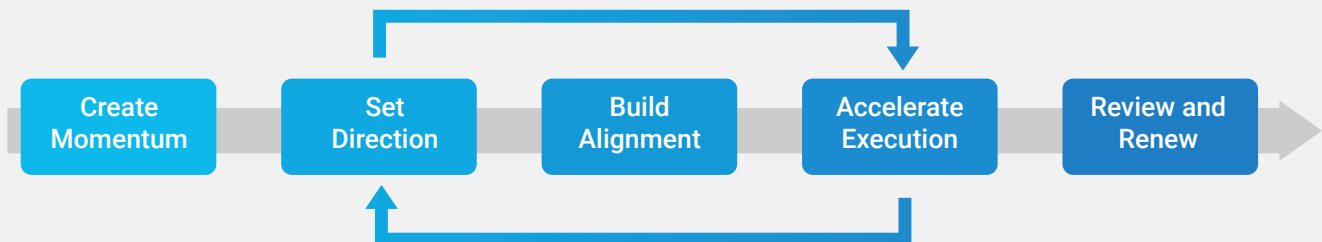
## Align Tier Three – Strategy Planning

### Building Strategic Agility

The digital revolution has changed strategy creation and execution. Organizations have long since shifted operating models to be more adaptive, iterative, and focused on continuous learning. However, organizations still suffer slowness in responding to change due to a lack of mobility inherent in their strategic processes. Those who succeed have diverged from traditional strategy creation and execution practices to implement radical ways of setting, tracking, and aligning strategy across their enterprise. We call this Strategic Agility.

This is what we help leaders do. Our strategic guides advise leaders in making breakthroughs by launching enterprise changes in their approach to strategy, goal setting, and execution. This builds Strategic Agility, which accelerates their ability to adjust and mobilize quickly to capture strategic opportunities. These changes require executive sponsorship, aligning people and processes, and implementing a digital platform to operationalize strategy with speed and transparency.

### The Rego Strategy Execution Model



- **Build Momentum**
  - Define transformation vision and objectives
  - Launch transformation leadership and champion teams
  - Develop communications and change plans
- **Set Direction**
  - Develop an organizational aspirational vision
  - Define strategic themes and initiatives
  - Develop objectives and key results
- **Build Alignment**
  - Engage leaders and champions to drive strategy and methodology
  - Identify and implement a first-level alignment plan for process and resource changes and launch Workfront as the digital platform
  - Cascade first round of objectives and key results across the enterprise
- **Accelerate Execution**
  - Embed objectives and key results into management flywheel – staff meetings, one-on-ones, all-hands, etc.
  - Coach leaders on continual strategy process – regular strategy reviews, organizational check-ins
  - Coach leaders/managers to drive continuous team and individual check-ins focused on results
- **Drive Adoption and Adaptation**
  - Hold quarterly retrospectives for organization and teams
  - Refresh objectives and key results across the enterprise
  - Identify best practices and celebrate wins

### Logistics

As Tier 3 is a comprehensive strategy implementation process, we will work jointly with you to develop the scope.  
Average price range:  
\$85,000 – \$200,000

## Contact Rego Today

Steve Winchester  
Steve.Winchester@regoconsulting.com  
801-419-4782

Michael Malone  
Michael.Malone@regoconsulting.com  
214-908-6669

[www.regoconsulting.com](http://www.regoconsulting.com)