



IMPACT Engine PractitionerTM



IMPACT ENGINE PRACTITIONER

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IMPACT Engine Practitioner™ Workbook

‘Knowledge alone is not power.
It’s the application of that knowledge that drives real IMPACT.’

Laura Barnard

What’s in This Workbook



Module Summaries

Concise overviews that highlight the topics covered, key concepts to remember, and mindset shifts for each chapter of *The IMPACT Engine*.



Notes

Space to capture insights, decisions, and questions as you work through the material.



Reflections

Guided prompts to help you internalize mindset shifts and connect the learning to your role.



Exercises

Hands-on activities that turn concepts into practical outputs you can apply immediately.



Activation Plan

A structured place to define clear next steps for applying the IMPACT Engine in your organization.



Laura Barnard

PMP, Prosci, CAL, IES

Inventor,
The IMPACT Engine System

Author, *The IMPACT Engine:
Accelerating Strategy Delivery
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Chief IMPACT Driver,
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Global Transformation Group

2021 World PMO Influencer
of the Year

Co-Founder,
International PMO Day

The role of delivery professionals is shifting fast.

Are you prepared to meet what is now expected of you?

We're living in a time of **relentless disruption**. Innovation is accelerating, change is constant, and transformation is no longer a one-time initiative—it's an **ongoing reality**. From economic uncertainty to digital reinvention, today's environment demands more than managing tasks or tracking timelines.

But here's the good news: **This is your moment.**

You are **uniquely equipped** to lead through this complexity. You already have the skills—planning, coordination, communication, and value delivery—that organizations desperately need.

The question is: **Will you use them to drive the outcomes that matter most to your organization?**

The trap that too many delivery leaders fall into is staying heads down, focusing on execution, and missing the opportunity to shape real strategic change. That's where the **IMPACT Engine System (IES)** comes in.

IES isn't just a framework. **It's your new operating model.**

It transforms how PMO and transformation teams **engage with the business**—from reactive and tactical to proactive and outcome-driven. It's a mindset, a set of capabilities, and a repeatable system for delivering **measurable business value** fast.

No matter your title, your role is evolving. The organizations that thrive will be the ones with delivery leaders who step up, shift their mindset, and drive real business value.

You're not here to run projects. You're here to run the engine that delivers your organization's strategy.

Welcome to the starting line. Your journey to becoming your organization's Strategy Navigator begins now.

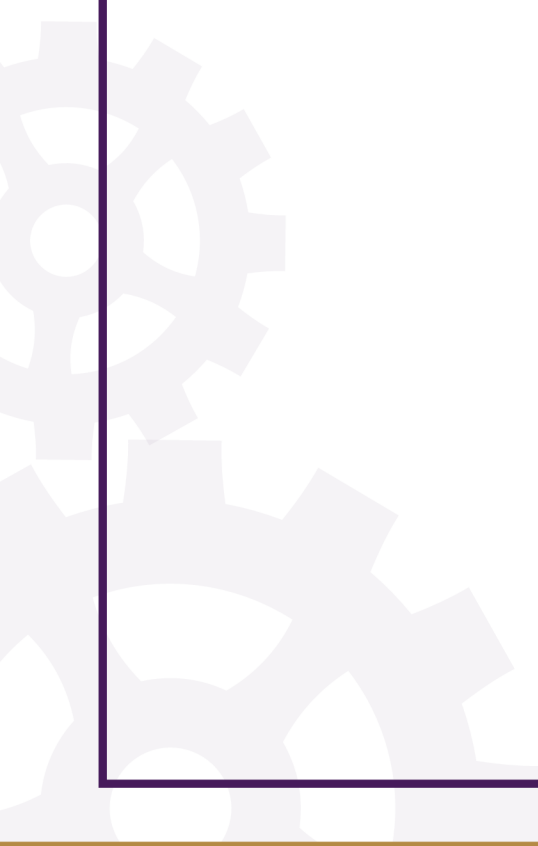
A handwritten signature in black ink that reads 'Laura Barnard'.

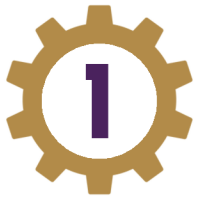
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YOUR STRATEGIC OPPORTUNITY



STAGE ONE: NEW ROLE, NEW MINDSET



Stage One establishes the mindset required to deliver business outcomes instead of just managing work. Before tools, processes, or plans can succeed, leaders must shift how they think about value, success, and their role in the organization. This stage anchors the behaviors and decisions that determine how every other stage of the IMPACT Engine is applied and sustained.



CHAPTER PURPOSE

This section reframes how you think about success by shifting the focus from delivering projects to delivering strategy. You'll explore where and why execution breaks down inside organizations and why project success does not equal business success. By understanding how value is lost across the strategy lifecycle, you'll see the opportunity to reposition your role as a driver of outcomes, not activity.



WHAT YOU'LL LEARN

- How the strategy lifecycle actually works in practice
- Where execution commonly breaks down
- Why delivery success often fails to create value
- How your role connects to strategic outcomes
- Why focusing only on execution leads to failure before projects start
- How misaligned work drains value



MAKE AN IMPACT

Use the Strategy Lifecycle Worksheet to brainstorm opportunities to set strategy delivery up for greater success.



KEY CONCEPTS

- Strategy lifecycle
- Business problems vs. delivery symptoms
- Project success vs. business success
- Where value is lost in execution
- Why mindset must change before tools and process

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Use this worksheet to brainstorm what's working well now in each phase of the Strategy Lifecycle and where there are opportunities for improvement or pain points you recognize in today's process.



STRATEGY DEFINITION	STRATEGY EXECUTION	STRATEGY REALIZATION



It's very tempting to write your answers in terms of the solution you think exists or is lacking (i.e. lack of a software tool or process). Avoid this. You must first conduct a root cause analysis for the pain points. Your goal now is simply to start thinking about what's working and what isn't in terms of where it's happening in the Strategy Lifecycle.

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Which of the challenges discussed appear in your organization?

Empty text box for reflection on organizational challenges.

Key Takeaways

Empty text box for reflection on key takeaways.

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What is working well in the Strategy Definition phase?

What are the challenges in the Strategy Definition phase?

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What is working well in the Strategy Execution phase?

Empty response area for the first question.

What are the challenges in the Strategy Execution phase?

Empty response area for the second question.

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What is working well in the Strategy Realization phase?

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What are the challenges in the Strategy Realization phase?

Empty response area for the second question.

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YOU ARE AN IMPACT DRIVER



STAGE ONE: NEW ROLE, NEW MINDSET



Stage One establishes the mindset required to deliver business outcomes instead of just managing work. Before tools, processes, or plans can succeed, leaders must shift how they think about value, success, and their role in the organization. This stage anchors the behaviors and decisions that determine how every other stage of the IMPACT Engine is applied and sustained.



CHAPTER PURPOSE

You move from being a project executor to a value-driving leader by redefining how IMPACT is created. The IMPACT Driver mindset focuses on influence, credibility, and outcomes rather than authority or methodology. When behavior aligns to business value, trust increases, decision-making improves, and project leaders begin shaping strategy delivery instead of reacting to it.



WHAT YOU'LL LEARN

- What it truly means to be an IMPACT Driver
- Why mindset shows up as behavior
- How credibility is built through outcomes, not control
- The difference between managing work and leading value
- Why role clarity alone does not create IMPACT
- How everyday actions signal leadership or erode trust



MAKE AN IMPACT

Complete the IMPACT Driver Mindset Worksheet to evaluate the mindset shifts you will make on this journey.



KEY CONCEPTS

- IMPACT Driver definition
- The I-M-P-A-C-T mindset shifts
- Behavior-based leadership
- Credibility as a leadership currency
- Why mindset must precede tools, process, and authority

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I

INSTILL FOCUS

You will solve strategic business problems, not just tactical project problems. This requires deeply understanding your organization’s vision and rallying people behind goals that focus their efforts like a laser on driving targeted business outcomes.

M

MEASURE OUTCOMES

You will expand your definition of project success to go well beyond simply tracking project progress using the triple constraint (time, scope, cost) and Earned Value Management. You will develop metrics and mechanisms for ensuring you are achieving not just the inputs and outputs for each project, but the intended outcomes.

P

PERFORM RELENTLESSLY

You will know that there is more to delivering projects than implementation methodology. You will focus on streamlining and optimizing strategy delivery across the project portfolio while ensuring you do not fall victim to methodology wars or to applying every tool in the toolbox to every project to the detriment of achieving successful project outcomes.

A

ADAPT TO THRIVE

You will bring people with you through the change process so that you can accelerate business results together while creating a nimble and flexible environment for all strategy delivery work to be achieved.

C

COMMUNICATE WITH PURPOSE

You will facilitate effective and transparent communication, removing overhead and administration for information sharing and collaboration so that stakeholders have the information they need, when they need it, to make decisions that are educated and informed.

T

TRANSFORM MINDSET

You will elevate the way you think about your role to become the strategic business partner your executives need by their side instead of waiting for your stakeholders to “get” the importance of the work you do. This will secure your seat as the Strategy Navigator guiding your organization on the journey of transformation.

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You will solve strategic business problems, not just tactical project problems. This requires deeply understanding your organization's vision and rallying people behind goals that focus their efforts like a laser on driving targeted business outcomes.

Being busy is not a badge of honor.

One of the biggest barriers to delivering real business value is the belief that doing more work means making more progress. In reality, overloaded teams spend their time switching tasks, reacting to noise, and advancing work that does not meaningfully move the organization toward its goals.

IMPACT Drivers understand that focus is not about working harder. It is about working on the right things. This requires stepping into a leadership role and intentionally guiding people toward outcomes, not activity.

What Instill Focus Means

To instill focus, you must create clarity about what matters most and protect that focus over time.

This means:

- **Solving business problems, not project problems:** Focus begins with understanding the organization's strategy and ensuring work is directly tied to measurable business outcomes, not just tasks or deliverables.
- **Getting in the driver's seat:** Focus does not happen by accident. Leaders must actively guide priorities, challenge misaligned work, and help stakeholders make clear tradeoff decisions.
- **Aligning work to outcomes:** Teams cannot focus if they do not understand why their work matters. Clear alignment between goals, outcomes, and delivery creates purpose and direction.
- **Reducing distractions and work in progress:** Focus is created as much by what you stop as by what you start. Limiting parallel work and removing low-value activity is essential to sustained performance.
- **Reinforcing focus through discipline:** Focus must be maintained through consistent priorities, clear expectations, and regular conversations about outcomes – not activity or busyness.

THE INSTILL FOCUS SHIFT

IMPACT Drivers shift from:

- Busy → Intentional
- More work → Right work
- Task completion → Business outcomes



When focus is clear and protected, teams stop reacting and start delivering results that matter.

Key Takeaways

Project Focus



Business Focus

What business challenges or opportunities do your stakeholders have?

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What might hold you back from instilling focus?

How will you instill focus going forward?

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You will expand your definition of project success to go well beyond simply tracking project progress using the triple constraint (time, scope, cost) and Earned Value Management. You will develop metrics and mechanisms for ensuring you are achieving not just the inputs and outputs for each project, but the intended outcomes. It will be clear that you are not only making progress but also achieving business results.

Performance is not the same as value

Many organizations are very good at measuring how work is progressing but far less effective at measuring whether that work is actually making a difference. Projects are declared “successful” because they finish on time and on budget, while the expected business benefits never materialize or go unused.

This creates a dangerous disconnect.

Delivery teams celebrate execution efficiency, while business leaders question the return on their investment. When success is defined only by performance metrics, organizations optimize activity instead of outcomes.

What Measure Outcomes Means

To measure outcomes, you must shift from tracking delivery progress to measuring business value.

This means:

- **Distinguishing performance from value:** Performance metrics tell you how well work is being executed; outcome metrics tell you whether that work is delivering the business results.
- **Treating projects as investments:** Projects exist to generate a return. Measuring outcomes means asking whether that return is being achieved, not just whether tasks are complete.
- **Focusing on results, not deliverables:** Templates, reports, and artifacts may support delivery, but they are not evidence of success. Outcomes are measured by behavior change, adoption, financial IMPACT, risk reduction, or strategic advancement.
- **Aligning metrics to business goals:** Outcome measures must connect directly to the organization’s strategic objectives, not internal delivery efficiency or process maturity.
- **Using measurement to guide decisions:** Outcome data should inform prioritization, tradeoffs, and course corrections – not just end-of-project reporting.

THE MEASURE OUTCOMES SHIFT

IMPACT Drivers shift from:

- Tracking performance → Demonstrating value
- Outputs and deliverables → Business outcomes
- Project success → Investment return



When you measure outcomes, conversations with leaders change. You stop defending process and start showing results. Your value is proven.

Key Takeaways

Outputs



Outcomes

How will you shift from measuring "what we're doing" to "why we're doing it?"

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What might hold you back from measuring outcomes?

How will you measure outcomes going forward?

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You will know that there is more to delivering projects than implementation methodology. You will focus on streamlining and optimizing strategy delivery across the project portfolio while ensuring you do not fall victim to methodology wars or to applying every tool in the toolbox to every project to the detriment of achieving successful project outcomes.

Execution builds trust.

In fast-moving organizations, credibility is earned by doing what you say you will do. Saying yes to every request may feel helpful, but it often leads to broken commitments, diluted focus, and lost value. Trust erodes when delivery slows, scope drifts, or value is delayed.

IMPACT Drivers understand that performance is not about activity or compliance. It is about delivering value quickly and reliably.

What Perform Relentlessly Means

To perform relentlessly, you must execute with discipline, judgment, and speed.

This means:

- **Being a commitment keeper:** Evaluate every request through an ROI lens and make commitments you can keep.
- **Accelerating time to value:** The longer delivery takes, the more value and focus are lost.
- **Using agility with intent:** Apply “big A” Agile, “little a” agile, or traditional methods based on what best serves the outcome.
- **Streamlining delivery mechanisms:** Processes, tools, and governance should remove friction, not add it.
- **Acting with judgment:** Take calculated risks to keep delivery moving, rather than waiting for perfect permission.

IMPACT Drivers do not just talk about results. They deliver them. That consistency earns trust, credibility, and influence.

THE PERFORM RELENTLESSLY SHIFT

IMPACT Drivers shift from:

- Saying yes → Making intentional commitments
- Following the process → Delivering results
- Slow execution → Accelerated value



When delivery is reliable and value is realized quickly, trust grows – and with it, your credibility and influence.

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Key Takeaways

Perfecting Process



Accelerating Results

Where can you streamline and optimize delivery to accelerate results?

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What might stand in your way of performing relentlessly?

How will you perform relentlessly going forward?

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You will bring people with you through the change process so that you can accelerate business results together while creating a nimble and flexible environment for all strategy delivery work to be achieved.

The future will not look like the past.

Many courses and methodologies assume that following the same steps will produce better results. They focus on refining delivery mechanics while ignoring a fundamental truth: project success does not automatically equal business success. In a rapidly changing environment, repeating what worked before is often the fastest way to fall behind.

IMPACT Drivers understand that adaptability is not optional. It is a leadership capability.

What Adapt to Thrive Means

To adapt to thrive, you must continuously evolve how you lead, deliver, and develop yourself and others.

This means:

- **Leading change with people, not to them:** Resistance is not a flaw in people; it is a signal that change is being imposed rather than co-created.
- **Adapting leadership style to the situation:** Different challenges, teams, and contexts require different approaches.
- **Building change leadership into delivery:** Every initiative introduces change, and managing that change is part of your responsibility, not someone else's.
- **Staying flexible in how work gets done:** Avoid rigid adherence to methods or roles that no longer serve the outcomes.
- **Owning your growth:** Developing future-ready skills, seeking new perspectives, and intentionally shaping your career instead of waiting for permission.

THE ADAPT TO THRIVE SHIFT

IMPACT Drivers shift from:

- Change done to people → Change created with people
- Fixed leadership style → Adaptive leadership
- Maintaining the status quo → Evolving to stay relevant



When you adapt how you lead and deliver, change becomes an accelerator instead of an obstacle – and your IMPACT grows with it.

Key Takeaways

Push



Pull

Describe what success looks like for your stakeholders (WIIFM).

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What might stand in your way of adapting to thrive?

How will you adapt to thrive going forward?

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You will facilitate effective and transparent communication, removing overhead and administration for information sharing and collaboration so that stakeholders have the information they need, when they need it, to make decisions that are educated and informed.

The problem is not that the business “doesn’t get” project management.

The problem is that project leaders often communicate in a language the business does not use. Methodologies, task lists, and technical detail may feel comfortable, but they rarely help leaders understand what matters most: results, return on investment, and progress toward strategic outcomes.

IMPACT Drivers understand that communication is not about sharing more information. It is about driving actions and enabling better decisions.

What Communicate with Purpose Means

To communicate effectively, you must translate delivery into business value and eliminate unnecessary noise.

This means:

- **Speaking the language of value:** Translating delivery into outcomes, IMPACT, and business results instead of activities and artifacts.
- **Communicating for decisions, not documentation:** Every update should support an action, a choice, or a course correction.
- **Streamlining communication:** Reducing unnecessary meetings, reports, and administrative overhead that distract from delivery.
- **Preventing information overload:** Providing only what stakeholders need to know – and stopping once clarity is achieved.
- **Maintaining focus through communication:** Reinforcing goals and outcomes consistently so teams stay aligned on what matters most.

THE COMMUNICATE WITH PURPOSE SHIFT

IMPACT Drivers shift from:

- Project jargon → Business language
- Information sharing → Decision support
- More communication → Outcome-focused communication



When communication is purposeful, stakeholders stay engaged, decisions happen faster, and delivery momentum is sustained.

Key Takeaways

Information



Actions and Decisions

Practice talking about outcomes in terms of the stakeholders' WIIFM.

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What might stand in your way of communicating with purpose?

How will you communicate with purpose going forward?

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You will elevate the way you think about your role to become the strategic business partner your executives need by their side instead of waiting for your stakeholders to “get” the importance of the work you do. This will secure your seat as the Strategy Navigator guiding your organization on the journey of transformation.

Earning your seat at the table is not about asking for influence, explaining project management, or proving your worth. It is the result of consistently helping leaders solve meaningful business problems and deliver measurable value.

When you view your role through the lens of a Strategy Navigator and apply the full power of the IMPACT Engine System, the dynamic changes. Leaders stop engaging you only after decisions are made and start pulling you into conversations earlier. They see you as someone who understands their world, their pressures, and their objectives – not just delivery mechanics.

This shift does not start with them. It starts with you.

What Transform Mindset Means

To transform into a strategic leader, you must change how you see your role and how you show up in the organization.

This means:

- **Viewing yourself as a Strategy Navigator:** Your role is not to manage projects, but to guide leaders through complex decisions that turn strategy into results.
- **Understanding the business first:** It is not the business’s job to understand project management. It is your responsibility to understand their objectives, constraints, and definition of success.
- **Solving business problems, not delivery problems:** When leaders see that you address their WIIFM and help maximize ROI, credibility follows naturally.
- **Leading through value, not explanation:** You do not need to convince anyone of your importance when your outcomes speak for themselves.
- **Owning the mindset shift:** Earning your seat starts internally. The way you think about your role determines the way others experience your leadership.

THE TRANSFORM MINDSET SHIFT

IMPACT Drivers shift from:

- Waiting for recognition → Creating undeniable value
- Project leader → Strategy Navigator
- Explaining PM → Solving executive problems



When you transform how you lead, your seat at the table is no longer something you pursue. It becomes the place you naturally belong.

Key Takeaways

Order Taker



IMPACT Driver

How do you now think differently about your ability to drive value?

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What might stand in your way of transforming mindset?

How will you transform your own mindset going forward?

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THE IMPACT ENGINE SYSTEM



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STAGE ONE: NEW ROLE, NEW MINDSET



Stage One establishes the mindset required to deliver business outcomes instead of just managing work. Before tools, processes, or plans can succeed, leaders must shift how they think about value, success, and their role in the organization. This stage anchors the behaviors and decisions that determine how every other stage of the IMPACT Engine is applied and sustained.



CHAPTER PURPOSE

Here, you are introduced to the IMPACT Engine System as an integrated operating model for turning strategy into measurable results. You will see how the six stages work together to prevent the strategy-to-execution gap before it occurs. This system shifts delivery from reactive execution to intentional value creation across the full strategy lifecycle.



WHAT YOU'LL LEARN

- How the six IMPACT Engine stages work together
- Why skipping stages breaks execution and value
- How to apply the system as an operating model
- Where organizations undermine strategy delivery
- How mindset drives application and sustainability



MAKE AN IMPACT

Use the IMPACT Engine Planner to complete your week-by-week plan for your MVP cycle.



KEY CONCEPTS

- The six IMPACT Engine stages
- Strategy lifecycle
- Operating model vs. framework
- Stage sequencing and dependency
- Why mindset before tools and process

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The IMPACT Engine System (IES) is a comprehensive operating model for accelerating strategic delivery and driving real business results. It transforms how organizations manage change by aligning strategy with execution, building delivery capability, and embedding a culture of measurable IMPACT.

Unlike traditional approaches that focus on checklists and deliverables, IES is focused on solving real business problems, delivering early wins, and sustaining long-term value. At its core, the IES helps PMO and transformation leaders and practitioners become strategic value creators rather than tactical order takers. It empowers teams to shift their mindset, collaborate across functions, and deliver outcomes in a way that is iterative, adaptive, and business-focused.

MINDSET	
ASSESS	
DEFINE	
PLAN	
DELIVER	
EVOLVE	

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STAGE ONE: MINDSET	STAGE TWO: ASSESS	STAGE THREE: DEFINE
WEEK 1	WEEK 2-3	WEEK 4-6
Establish the foundation before taking action	Build trust and uncover real business challenges	Solve the right problems before building solutions
<input type="checkbox"/> Understand the full strategy lifecycle <input type="checkbox"/> Commit to the IMPACT Driver mindset <input type="checkbox"/> Reframe how success is defined <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Conduct stakeholder interviews <input type="checkbox"/> Identify challenges and opportunities <input type="checkbox"/> Assess strategy delivery today <input type="checkbox"/> Review and prioritize with leaders <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Perform root cause analysis on top issues <input type="checkbox"/> Identify solutions to address root causes <input type="checkbox"/> Map solutions across the strategy lifecycle <input type="checkbox"/> Start building the IMPACT Delivery Model <input type="checkbox"/> _____ <input type="checkbox"/> _____
NOTES	NOTES	NOTES
Where is strategy delivery breaking down? Which mindset shift matters most now?	Stakeholders identified: Themes emerging: Priorities communicated:	Root causes identified: Lifecycle-aligned solutions:

STAGE FOUR: PLAN	STAGE FIVE: DELIVER	STAGE SIX: EVOLVE
WEEK 7-8	WEEK 9-12	WEEK 13
Create clarity and alignment before delivery	Deliver value while bringing people with you	Measure, learn, and set direction for the next cycle
<input type="checkbox"/> Continue the IMPACT Delivery Model <input type="checkbox"/> Define outcomes and expected IMPACT <input type="checkbox"/> Create the IMPACT Delivery Road Map <input type="checkbox"/> Review and prioritize with leaders <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Build the MVP version of the first service <input type="checkbox"/> Pilot the service with initial stakeholders <input type="checkbox"/> Communicate outcomes and value <input type="checkbox"/> Observe adoption, resistance, results <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Measure results from the first cycle <input type="checkbox"/> Evaluate value and IMPACT achieved <input type="checkbox"/> Identify required adjustments <input type="checkbox"/> Define focus for next IES cycle <input type="checkbox"/> _____ <input type="checkbox"/> _____
NOTES	NOTES	NOTES
Road Map highlights: Confirmed priorities: Tradeoffs made:	MVP service delivered: Stakeholders involved: Early outcomes observed:	Results measured: Lessons learned: Next cycle focus:



BRING THEM WITH YOU



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STAGE TWO: ASSESS THE ORGANIZATION FOR OPPORTUNITIES



Stage Two ensures you solve the right problems with the right people. By building trust early and seeing delivery through stakeholder eyes, you uncover real priorities, surface hidden pain points, and avoid false assumptions. This stage creates alignment, reduces resistance, and produces a shared, evidence-based view of where value is being lost and where to focus first.



CHAPTER PURPOSE

Establish the trust and understanding required to lead meaningful change. This section focuses on identifying the right stakeholders, assessing readiness and resistance, and interpreting cultural and sponsorship signals so you can anticipate challenges, reduce friction, and create the conditions necessary for successful strategy delivery.



WHAT YOU'LL LEARN

- How to identify the stakeholders who truly influence outcomes
- How to assess readiness, resistance, and change appetite
- How trust accelerates access to real information
- How to spot cultural and sponsorship risks early
- Why resistance is data, not an obstacle



MAKE AN IMPACT

- Use the Stakeholder Engagement Plan to document your key stakeholders and their involvement in your IES buildout.
- Use the Organizational Change Assessment to evaluate your organization's change culture.



KEY CONCEPTS

- Stakeholder identification and influence
- Trust as a prerequisite for value delivery
- Readiness vs. resistance
- Cultural signals and sponsorship
- Why assessment must happen first

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This worksheet is two steps: **assess first**, then **define how you will engage**.

Do not jump straight to tactics. Effective engagement starts with understanding.

STEP 1: Stakeholder Assessment

Begin by identifying the stakeholders who influence or are affected by the work you are leading. For each stakeholder, capture:

Name:

Who is the individual or group?

Role:

What role do they play in the organization or initiative?

Category: Classify each stakeholder based on their likely disposition:

- **Lovers** - Support the change and want it to succeed
- **Haters** - Likely to resist or challenge the change
- **Just Don't Care** - Neutral or disengaged unless directly affected

Challenges / Opportunities

Identify what matters most to them. Consider:

- Business outcomes they care about
- Risks they want to avoid
- Pressures, incentives, or success measures tied to their role

This step is about understanding, not persuading.

STEP 2: Build the Engagement Plan

Once you understand each stakeholder, define how you will engage them.

For each stakeholder, capture:

Approach:

Describe how you will interact with them to build alignment and support. They could be your early adopters and champions when done right.

Consider:

What information they need (not everything you know)

- How often they need to be engaged
- How this work connects to what they care about

Your goal is not to "win everyone over."

Your goal is to engage intentionally based on IMPACT, influence, and motivation.

Key Guidance

- Focus on quality of insight, not completeness
- Keep language simple and business-focused
- Revisit and update this plan as relationships and priorities evolve

Strong stakeholder engagement is not about communication volume.

It is about clarity, relevance, and trust.

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STAKEHOLDER ENGAGEMENT PLAN



NAME	ROLE	CATEGORY	CHALLENGES / OPPORTUNITIES	APPROACH

STAKEHOLDER ENGAGEMENT PLAN



NAME	ROLE	CATEGORY	CHALLENGES / OPPORTUNITIES	APPROACH

Use this assessment to evaluate organizational change capability.

How do decisions get made in the organization?

How many changes are currently underway in the organization?

What lessons can be learned from prior change successes and failures?

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What does the organizational reporting structure look like?

Identify the relationships that influence power and control.

List key initiatives that overlap, interact, or have competing resource requirements.

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GIVE THEM WHAT THEY WANT



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STAGE TWO: ASSESS THE ORGANIZATION FOR OPPORTUNITIES



Stage Two ensures you solve the right problems with the right people. By building trust early and seeing delivery through stakeholder eyes, you uncover real priorities, surface hidden pain points, and avoid false assumptions. This stage creates alignment, reduces resistance, and produces a shared, evidence-based view of where value is being lost and where to focus first.



CHAPTER PURPOSE

Shift from assuming what the organization needs to clearly understanding what stakeholders value most. This section focuses on uncovering true priorities, translating pain points into meaningful outcomes, and defining value in the language leaders use to make decisions, ensuring services are designed to solve the right problems.



WHAT YOU'LL LEARN

- How to uncover real stakeholder priorities beyond surface-level requests
- Techniques for conducting effective, insight-driven stakeholder interviews
- How to translate pain points into outcome-focused opportunities
- How to synthesize assessment inputs into clear, actionable findings



MAKE AN IMPACT

- Evaluate assessment methods and determine best course of action.
- Conduct a SWOT Analysis by Strategy Lifecycle phase.
- Develop your Assessment Findings Presentation to guide stakeholders on the change journey and gain buy-in.



KEY CONCEPTS

- WIIFM (What's In It For Me)
- Wants vs. needs
- Stakeholder language vs. delivery language
- Evidence-based assessment
- Why value definition belongs before solution design

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ASSESSMENT METHODS



STAKEHOLDERS	INTERVIEWS	FOCUS GROUPS	SURVEYS	WORKSHOPS	PROJECT AUDITS		

This SWOT helps you assess how effectively your organization delivers value across the full strategy lifecycle, not just during project execution. For each phase, identify the Strengths, Weaknesses, Opportunities, and Threats that affect your organization's ability to turn strategy into results.

STRATEGY DEFINITION

Focus on how priorities are set and decisions are made.

Consider

- How clearly strategy is defined and communicated
- How initiatives are selected and prioritized
- Where misalignment or overload begins

Ask yourself:

Are we defining the right work, or setting ourselves up for execution problems later?

STRATEGY EXECUTION

Focus on how work actually gets delivered.

Consider:

- Flow of work, capacity, and decision-making
- Governance, processes, and handoffs
- Where delivery slows down or stalls

Ask yourself:

What helps or hinders getting work done once priorities are set?

STRATEGY REALIZATION

Focus on outcomes and value after delivery.

Consider:

- How success is measured
- Whether benefits are tracked and sustained
- Where value fades after implementation

Ask yourself:

Do we know if the work delivered the intended business results?

Key Guidance

- Capture patterns, not isolated complaints
- Be honest and practical
- Use this SWOT to identify where value is lost and which problems are worth solving first

This analysis provides the foundation for the Define stage and ensures you focus on the right challenges, not just the most visible ones.

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STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Document your assessment findings presentation talking points.

EXECUTIVE SUMMARY	
APPROACH	
WHAT'S WORKING	
FINDINGS	
CHALLENGES	
OPPORTUNITIES	
INDUSTRY PERSPECTIVE	
PRIORITIES	
NEXT STEPS	

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SOLVE THE RIGHT PROBLEMS



STAGE THREE: DEFINE HIGH-IMPACT SERVICES



Stage Three is where credibility is earned. This stage focuses on diagnosing root causes, not reacting to symptoms, and intentionally defining high-IMPACT services that address real business challenges. By aligning solutions to the strategy lifecycle and making clear value trade-offs, you ensure effort is focused on work that is truly worth doing and capable of delivering measurable outcomes.



CHAPTER PURPOSE

Most organizations struggle not because they lack effort, but because they are solving the wrong problems. This section focuses on identifying the true root causes behind delivery challenges instead of repeatedly treating symptoms. By reframing problems correctly, you shift from reactive “whack-a-mole” to intentional, value-driven decisions that set the foundation for sustainable results.



WHAT YOU’LL LEARN

- How to distinguish root causes from visible symptoms
- Why treating symptoms creates recurring delivery failure
- How to properly frame problems before designing solutions
- When and why PMO and transformation teams default to tactical fixes



MAKE AN IMPACT

- Complete the Root Cause Analysis Worksheet to evaluate identified pain points.
- Complete the Root Cause Communication Guide to explain the consequences of inaction to stakeholders.



KEY CONCEPTS

- Symptoms vs. root causes
- The symptom failure pattern
- Problem framing
- Five Whys (applied, not theoretical)
- Why problem definition determines outcomes

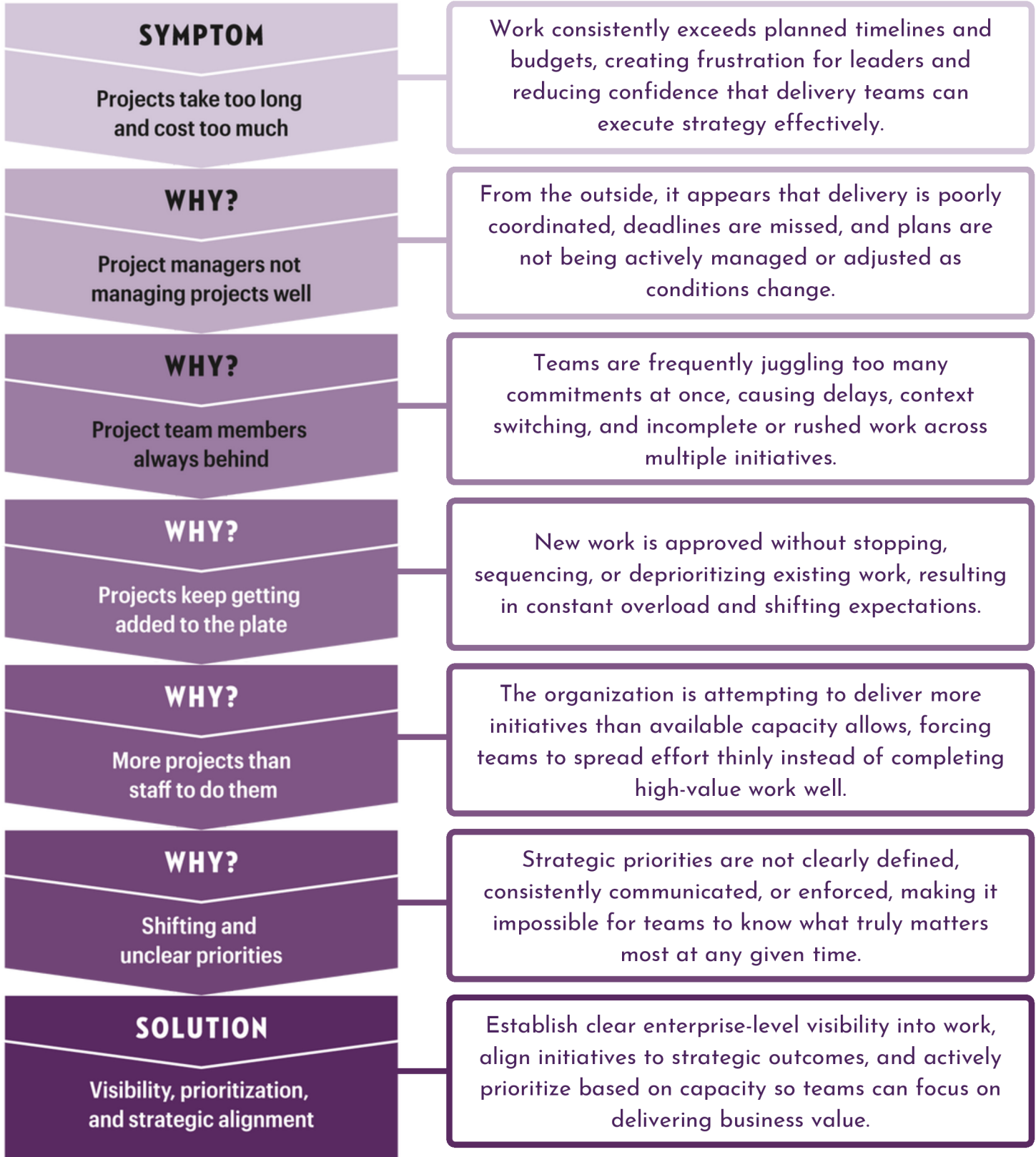
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Use this worksheet to refine your communication scripts for engaging each stakeholder or stakeholder group. It will help you discuss how they experience the challenge or opportunity and the measurable successful outcomes and IMPACT you aim to achieve for them. The example below can be used to guide you.



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Use the 5 Whys Technique to document the symptom, investigation, and arrive at a likely root cause. It won't always be exactly five times.

SYMPTOM	
WHY	
WHY	
WHY	
WHY	
WHY	
ROOT CAUSE	

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COLLABORATION: Who needs to be in this conversation to answer the why questions?

LOGICAL PROGRESSION: Has the logical progression narrowed the candidate root causes to a select few?
 YES NO _____

NECESSITY AND SUFFICIENCY: Will addressing the identified root cause create the desired ripple effect that addresses the major pain points?
 YES NO _____

After identifying root causes, use this framework to articulate the problem, why it exists, what success looks like, and what happens if nothing changes. It helps decision-makers clearly see that inaction is still a decision and reinforces accountability.

- **SYMPTOM:** How stakeholders describe the issue or opportunity
- **ROOT CAUSE:** The underlying reason it exists
- **OUTCOME:** The results stakeholders want to achieve
- **CONSEQUENCES:** The negative effect of not taking action

SYMPTOM	ROOT CAUSE
OUTCOME	CONSEQUENCES



CREATE SOLUTIONS ACROSS THE STRATEGY LIFECYCLE



STAGE THREE: DEFINE HIGH-IMPACT SERVICES



Stage Three is where credibility is earned. This stage focuses on diagnosing root causes, not reacting to symptoms, and intentionally defining high-IMPACT services that address real business challenges. By aligning solutions to the strategy lifecycle and making clear value trade-offs, you ensure effort is focused on work that is truly worth doing and capable of delivering measurable outcomes.



CHAPTER PURPOSE

You move from problem diagnosis to solution design by shifting from project thinking to service thinking. Instead of isolated initiatives, you design solutions that align to strategy definition, execution, and realization. This creates coherence across the lifecycle, prevents misaligned fixes, and ensures every solution contributes directly to measurable business outcomes.



WHAT YOU'LL LEARN

- How to design services instead of one-off projects
- How to align solutions to the full strategy lifecycle
- Why sequencing solutions matters
- How misaligned fixes undermine value
- How to think in terms of a service portfolio



MAKE AN IMPACT

- Brainstorm solutions and organize them by Strategy Lifecycle phase.
- Complete the IMPACT Services Register to show the value of each service to address business challenges and opportunities.



KEY CONCEPTS

- Services vs. projects
- Strategy lifecycle alignment
- Solution sequencing
- Service portfolio thinking

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Place each solution in the strategy lifecycle phase where it best addresses the identified root cause.

STRATEGY DEFINITION	
STRATEGY EXECUTION	
STRATEGY REALIZATION	

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DETERMINE YOUR “WORTH IT FACTOR”



STAGE THREE: DEFINE HIGH-IMPACT SERVICES



Stage Three is where credibility is earned. This stage focuses on diagnosing root causes, not reacting to symptoms, and intentionally defining high-IMPACT services that address real business challenges. By aligning solutions to the strategy lifecycle and making clear value trade-offs, you ensure effort is focused on work that is truly worth doing and capable of delivering measurable outcomes.



CHAPTER PURPOSE

You learn how to evaluate which solutions are truly worth pursuing by tying them directly to business value, outcomes, and trade-offs. Instead of saying yes to everything, you apply a disciplined approach to prioritization that helps leaders make informed decisions, protects focus, and ensures limited capacity is invested where it will generate the highest return.



WHAT YOU’LL LEARN

- How to evaluate solutions through a value lens
- How to make and defend prioritization decisions
- How to articulate trade-offs clearly
- How to link services to measurable outcomes
- How to communicate why something is “worth it”



MAKE AN IMPACT

Use the 5-Step IMPACT Communication Framework to share your team’s “Worth It Factor” in business terms.



KEY CONCEPTS

- Worth It Factor
- Trade-offs and prioritization
- Service-to-value linkage
- Outcome-based decision-making
- IMPACT Communication Framework

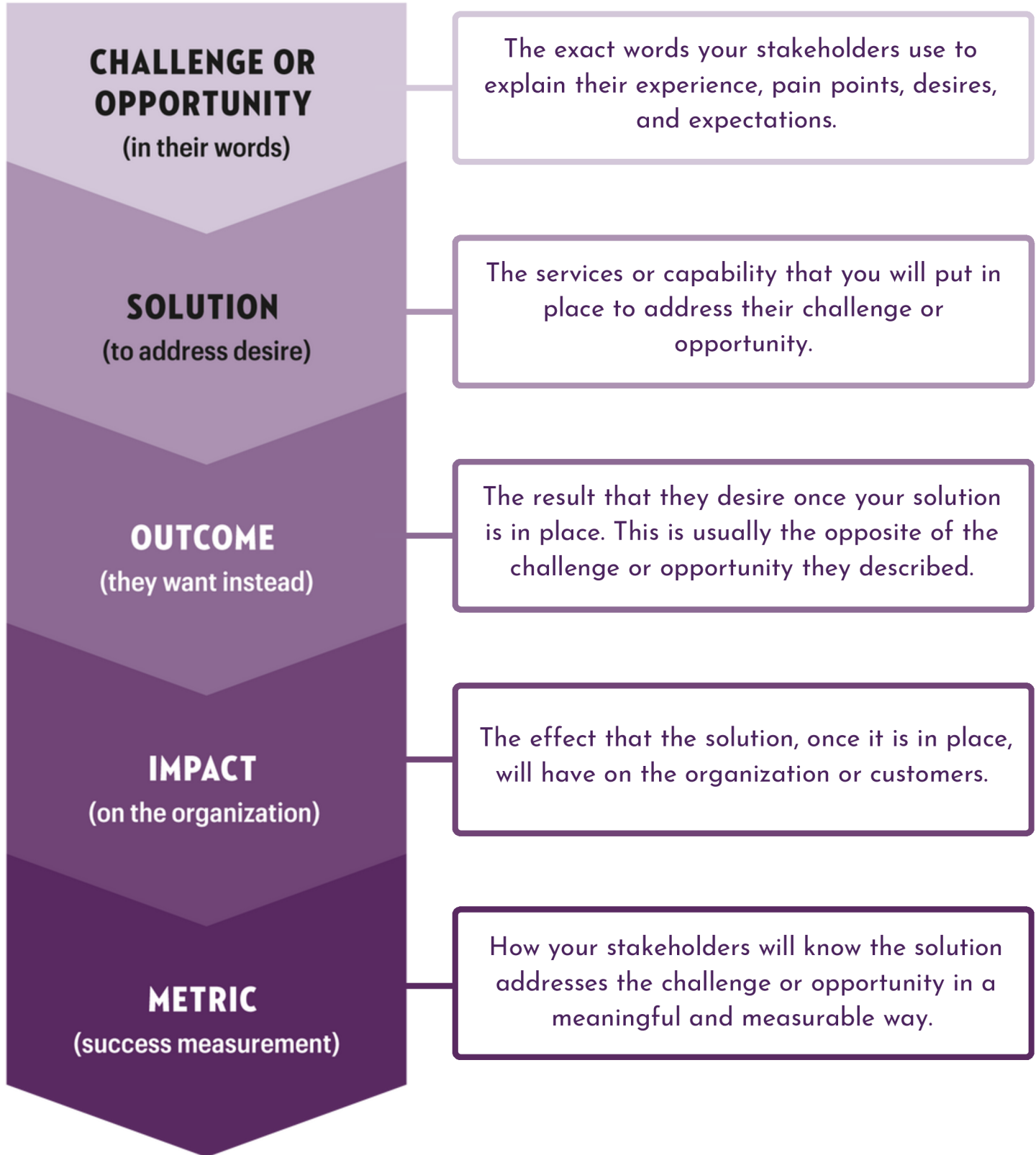
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Use this worksheet to refine your communication scripts for engaging each stakeholder or stakeholder group (based on what matters most to them - WIIFM). It will help you discuss how they experience the challenge or opportunity and the measurable successful outcomes and IMPACT you aim to achieve for them.



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STEP	DESCRIPTION
CHALLENGE/ OPPORTUNITY	
SOLUTION	
OUTCOME	
IMPACT	
METRIC	

STEP	DESCRIPTION
CHALLENGE/ OPPORTUNITY	
SOLUTION	
OUTCOME	
IMPACT	
METRIC	

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STEP	DESCRIPTION
CHALLENGE/ OPPORTUNITY	
SOLUTION	
OUTCOME	
IMPACT	
METRIC	

STEP	DESCRIPTION
CHALLENGE/ OPPORTUNITY	
SOLUTION	
OUTCOME	
IMPACT	
METRIC	

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DEVELOP THE IMPACT DELIVERY FRAMEWORK



STAGE FOUR: PLAN THE IMPACT JOURNEY



This stage translates insight and defined services into a clear, actionable plan for execution. Planning here is not about creating static project plans, but about intentionally sequencing work, aligning capacity to priorities, and setting up delivery in a way that protects value, enables decision-making, and supports continuous progress toward outcomes.



CHAPTER PURPOSE

You will learn how to design a delivery approach that connects strategy to execution in a practical, repeatable way. This work focuses on translating priorities into an integrated delivery model that clarifies how initiatives move from idea to outcome. The emphasis is on flow, sequencing, and decision-making rather than rigid plans or methodology-driven artifacts.



WHAT YOU'LL LEARN

- How to design a delivery framework that supports strategy execution
- How to move from prioritized challenges to an executable delivery model
- How to align governance, planning, and reporting to outcomes
- How to balance structure with flexibility to maintain momentum
- How to set up delivery for learning, adjustment, and sustained value



MAKE AN IMPACT

- Create your IMPACT Engine Business Plan.
- Build your IMPACT Delivery Road Map to document services, outcomes, IMPACT, metrics, and timeline.



KEY CONCEPTS

- IMPACT Delivery Framework
- Strategy-to-execution flow
- Outcome-based planning
- Capacity and prioritization alignment
- Governance that enables decisions
- Planning as a dynamic, iterative discipline

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Document the key points to describe how your IMPACT Engine drives business value.

STRATEGIC CONTEXT	
CHALLENGES/ OPPORTUNITIES	
VALUE	
SERVICES	
OUTCOMES	
IMPACT	
METRICS	
MVP	

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IMPACT DELIVERY ROAD MAP



Category	Service	IMPACT	Metric	Year 1				Year 2				
				Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	



BECOME THE STAKEHOLDER WHISPERER



STAGE FOUR: PLAN THE IMPACT JOURNEY



This stage translates insight and defined services into a clear, actionable plan for execution. Planning here is not about creating static project plans, but about intentionally sequencing work, aligning capacity to priorities, and setting up delivery in a way that protects value, enables decision-making, and supports continuous progress toward outcomes.



CHAPTER PURPOSE

You will learn how to communicate in a way that enables alignment, accelerates decisions, and reduces friction across delivery. This work focuses on shifting from status-heavy reporting to outcome-driven conversations that matter to leaders. The goal is to ensure stakeholders have the right information, at the right time, to support progress and value realization.



WHAT YOU'LL LEARN

- How to communicate delivery progress in business terms
- How to tailor messages to different stakeholder needs
- How to remove unnecessary reporting and administrative overhead
- How to use communication to drive decisions, not just awareness
- How to maintain alignment as priorities and conditions change



MAKE AN IMPACT

- Brainstorm how you will Educate, Excite, and Engage stakeholders.
- Develop the IMPACT Communications Plan to document your communication strategy.



KEY CONCEPTS

- Outcome-based communication
- Stakeholder-centric messaging
- Decision-enabling information
- Reducing communication overhead
- Translating delivery into value
- Communication as a leadership capability

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Planning your communications upfront helps you shape the narrative, reinforce the value of the IMPACT Engine, and ensure stakeholders receive clear, consistent information. Use this worksheet to define how you will educate, engage, and support stakeholders, and to prepare thoughtful responses to questions before they arise.



Use the Educate, Excite and Engage framework to determine how you communicate the value and IMPACT your IMPACT Engine will make on the organization.



How will you educate stakeholders about these changes?

How will you excite stakeholders about these changes?

How will you effectively engage stakeholders in this change process?

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CREATE A DELIVERY-FOCUSED CULTURE



STAGE FIVE: DELIVER SUSTAINABLE VALUE



This stage is where strategy becomes real. Planning and alignment mean nothing if value is not actually delivered, measured, and sustained. Stage Five focuses on executing with discipline, maintaining focus under pressure, and ensuring commitments turn into outcomes. This is where credibility is built or lost, and where IMPACT Drivers prove they can translate intent into results that matter to the business.



CHAPTER PURPOSE

High-performing strategy delivery is not about following a single methodology or applying every tool available. It is about executing with discipline, protecting commitments, and continuously optimizing how work flows through the organization. Your focus is on accelerating value delivery, maintaining trust, and ensuring execution decisions are always made through a return-on-investment lens.



WHAT YOU'LL LEARN

- How to evaluate delivery decisions based on ROI, not methodology
- Why keeping commitments builds credibility and executive trust
- How execution speed directly affects value realization
- When to adapt delivery approaches without losing control
- How disciplined execution strengthens your seat at the table



MAKE AN IMPACT

Complete the One Hour Manager Worksheet to help you optimize your management and productivity.



KEY CONCEPTS

- ROI-driven execution decisions
- Execution speed and value erosion
- Adaptive delivery meeting stakeholders on the change journey
- Trust as an outcome of consistent delivery

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REFLECT	PLAN
MANAGE	MAKE PROGRESS



LEAD THE CHANGE



STAGE FIVE: DELIVER SUSTAINABLE VALUE



This stage is where strategy becomes real. Planning and alignment mean nothing if value is not actually delivered, measured, and sustained. Stage Five focuses on executing with discipline, maintaining focus under pressure, and ensuring commitments turn into outcomes. This is where credibility is built or lost, and where IMPACT Drivers prove they can translate intent into results that matter to the business.



CHAPTER PURPOSE

Delivering value requires more than execution discipline. It requires navigating resistance, uncertainty, and shifting dynamics as change unfolds. This section focuses on adapting leadership style, addressing resistance constructively, and keeping delivery moving through influence rather than authority. Remember, you are doing change *with* people not *to* people.



WHAT YOU'LL LEARN

- How to recognize different forms of change resistance
- Why resistance signals misalignment, not failure
- How to adapt leadership approach to stakeholder needs
- How to maintain delivery momentum during disruption
- How influence outperforms authority in change situations



MAKE AN IMPACT

- Complete the Marketing Plan to guide your intentional focus on each step in the customer journey.
- Document how you will adapt your management style.
- Use the Change Resistance Plan to address resistance.



KEY CONCEPTS

- Resistance is avoidable and reversible
- Adaptive leadership responses
- Influence vs. authority
- Change as a continuous condition
- Leading through uncertainty

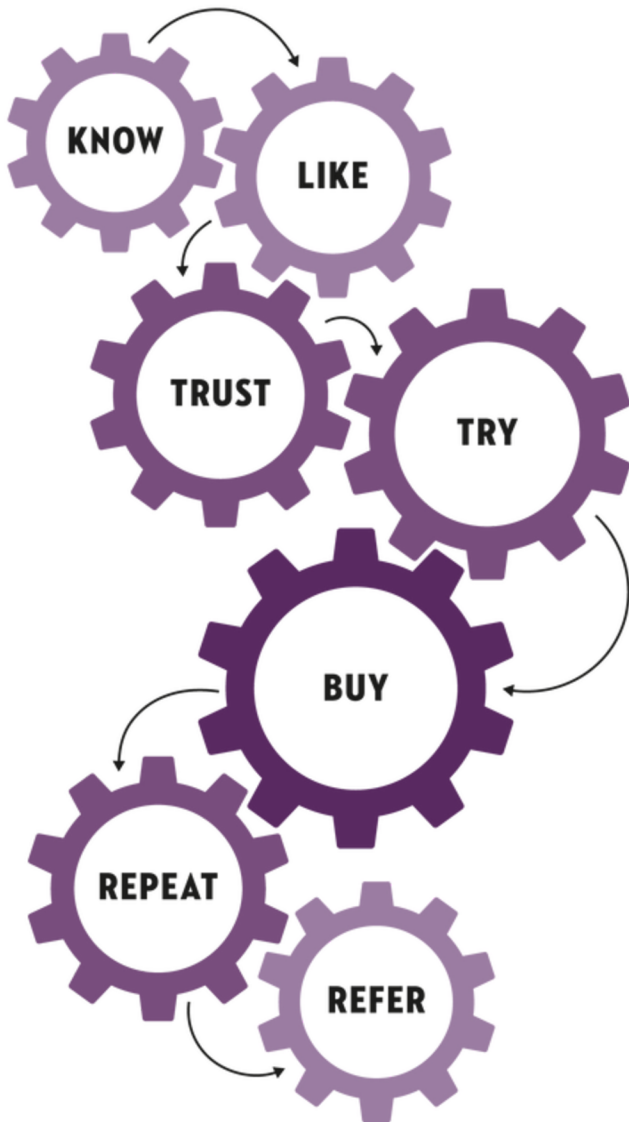
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Use the marketing guide to plan how you will intentionally build awareness, relationships, trust, and adoption of your services, moving stakeholders from initial exposure to advocacy.



KNOW
 Make yourself known by sharing information from your business plan so stakeholders understand who you are, what your goals are, and how you intend to help the organization succeed.

LIKE
 Build genuine relationships by being approachable, listening actively, and showing interest in people, making it easier for them to want to work with you.

TRUST
 Establish trust by being transparent, sharing accurate information, and consistently delivering on your commitments so stakeholders build confidence.

TRY
 Invite stakeholders who know, like, and trust you to pilot your services, using early successes and feedback to demonstrate value and build momentum.

BUY
 Show the value of your services so stakeholders understand how your work helps them achieve their business objectives with higher ROI.

REPEAT
 Sustain engagement by consistently delivering results, communicating outcomes, and incorporating feedback so stakeholders bring you new challenges and opportunities.

REFER
 Encourage satisfied stakeholders to share their success stories and advocate for your team, using social proof and measured IMPACT to expand adoption.

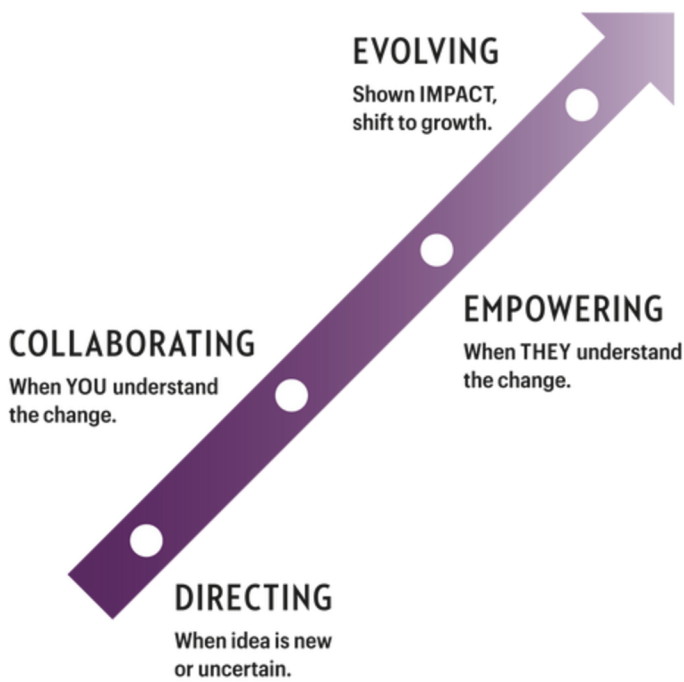
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Complete each box by describing how you will intentionally move stakeholders through each step, from awareness to advocacy.

KNOW	
LIKE	
TRUST	
TRY	
BUY	
REPEAT	
REFER	

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Different situations require different leadership responses. Adaptive management means adjusting how you lead based on what people need to move forward.



How familiar are stakeholders with this change?

How will you adapt your management style to guide them through change?

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While everything you are learning in The IMPACT Engine is designed to eliminate change resistance, you may find yourself in a situation where resistance to your team and the change you are driving is already present. Be prepared to address this resistance so that you can turn detractors into champions for change.

What does change resistance look like in your organization?

Where in the organization is change resistance likely to occur?

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How will change resistance be identified?

Empty response area for identifying change resistance.

How will you manage change resistance from each stakeholder group?

Empty response area for managing change resistance from each stakeholder group.

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DRIVE CONTINUAL VALUE DELIVERY



STAGE SIX: EVOLVE YOUR IMPACT ENGINE



This stage ensures the IMPACT Engine does not stall after initial success. It focuses on sustaining relevance by continuously measuring value, adapting services, and evolving how strategy delivery operates over time. Your time now is about learning, refinement, and long-term IMPACT so your team remains a trusted, strategic capability as organizational priorities shift.



CHAPTER PURPOSE

Sustained IMPACT requires more than successful delivery. It requires continuous evaluation and evolution. This section focuses on measuring business value, using feedback to adapt services, and refining the delivery approach as priorities shift. The emphasis is on learning loops, outcome-based metrics, and ensuring the work continues to deliver value over time.



WHAT YOU'LL LEARN

- How to measure value beyond project completion
- How to evaluate whether services are still relevant
- How to use feedback loops to drive improvement
- How to adapt delivery plans as priorities change
- How continual learning sustains strategic relevance



MAKE AN IMPACT

Update your IMPACT Delivery Model, which includes the resources from the Assess, Define, and Plan stages, to reflect any lessons learned or shifts in priorities to support the business.



KEY CONCEPTS

- Value realization vs. delivery completion
- Outcome metrics vs. activity metrics
- Feedback loops and learning cycles
- Continuous improvement in strategy delivery
- Evolving services to maintain IMPACT

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MEASURE WHAT MATTERS	VALIDATE VALUE REALIZATION	COLLECT FEEDBACK
<input type="checkbox"/> Outcome metrics defined for each service <input type="checkbox"/> Metrics reflect business value, not activity <input type="checkbox"/> Leaders agree the measures reflect success <input type="checkbox"/> Metrics are driving actions and decisions <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Outcomes are reviewed against expectations <input type="checkbox"/> Value realization is discussed, not assumed <input type="checkbox"/> Expected vs. actual gaps are visible <input type="checkbox"/> Success is tied to business results <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Stakeholder feedback is being collected <input type="checkbox"/> Feedback is outcome-focused <input type="checkbox"/> Insights are documented and shared <input type="checkbox"/> Feedback informs decisions <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____
ITERATE SERVICES	CONFIRM ALIGNMENT	DEFINE IMPACT FOCUS
<input type="checkbox"/> Services are being refined based on results <input type="checkbox"/> Adjustments are made intentionally, <input type="checkbox"/> Road maps reflect learning from delivery <input type="checkbox"/> Iteration is standard operating procedure <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Services align with Strategy Lifecycle <input type="checkbox"/> New gaps have been identified <input type="checkbox"/> Misaligned services are corrected/stopped <input type="checkbox"/> Lifecycle coverage is reassessed regularly <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> A clear focus is set for next cycle <input type="checkbox"/> Start, stop, shift, save has been evaluated <input type="checkbox"/> Leadership agrees on the next priority <input type="checkbox"/> Next cycle is framed around value <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____

MINDSET	ASSESS	DEFINE
<input type="checkbox"/> We are prioritizing business outcomes over activity and outputs <input type="checkbox"/> The team is clear on <i>why</i> this work matters to the organization <input type="checkbox"/> We are focusing on the right work, not just more work <input type="checkbox"/> Behaviors reflect IMPACT Driver mindset shifts, not old habits <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> We are regularly engaging stakeholders, not relying on assumptions <input type="checkbox"/> Stakeholder priorities are still current and validated <input type="checkbox"/> New risks, resistance, or constraints have been identified <input type="checkbox"/> Trust and engagement levels are being monitored and maintained <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Root causes have been validated, not just symptoms addressed <input type="checkbox"/> Services are still aligned to the correct strategy lifecycle phase <input type="checkbox"/> Solutions are focused on value, not convenience or tradition <input type="checkbox"/> Tradeoffs and prioritization decisions are explicit and intentional <input type="checkbox"/> _____ <input type="checkbox"/> _____
PLAN	DELIVER	EVOLVE
<input type="checkbox"/> The IMPACT Delivery Road Map reflects current priorities <input type="checkbox"/> Outcomes and success measures are clearly defined <input type="checkbox"/> The delivery cadence supports focus and flow <input type="checkbox"/> Adjustments have been made based on learning, not pressure <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Delivery is focused on outcomes, not task completion <input type="checkbox"/> Stakeholders understand progress and value being created <input type="checkbox"/> Resistance is being addressed proactively, not ignored <input type="checkbox"/> Cadence and routines reinforce accountability and focus <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Outcomes are being measured against expectations <input type="checkbox"/> Feedback is being used to refine services and delivery <input type="checkbox"/> Decisions are being made about what to continue, change, or stop <input type="checkbox"/> The next IMPACT cycle focus has been clearly defined <input type="checkbox"/> _____ <input type="checkbox"/> _____



TAKE YOUR SEAT AT THE TABLE



STAGE SIX: EVOLVE YOUR IMPACT ENGINE



This stage ensures the IMPACT Engine does not stall after initial success. It focuses on sustaining relevance by continuously measuring value, adapting services, and evolving how strategy delivery operates over time. Your time now is about learning, refinement, and long-term IMPACT so your team remains a trusted, strategic capability as organizational priorities shift.



CHAPTER PURPOSE

Sustained IMPACT requires more than successful delivery. It requires continuous evaluation and evolution. This section focuses on measuring business value, using feedback to adapt services, and refining the delivery approach as priorities shift. The emphasis is on learning loops, outcome-based metrics, and ensuring the work continues to deliver value over time.



WHAT YOU'LL LEARN

- How sustained value earns strategic access and executive support
- How to communicate IMPACT in executive language
- How to position yourself as a Strategy Navigator
- How credibility shifts leadership engagement
- How influence is built through outcomes, not authority



MAKE AN IMPACT

- Review the materials in The IMPACT Engine and this IMPACT Engine Practitioner Workbook.
- Prepare to take the exam!

You've got this!



KEY CONCEPTS

- Strategy Navigator role
- Executive value framing
- Influence through results
- Strategic partnership vs. delivery support
- Sustaining credibility over time

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Use this worksheet to create your personalized IMPACT Engine Activation Plan by identifying a real challenge, applying mindset shifts, and defining your first MVP action to drive measurable value. Then, you'll use the 5-step IMPACT Communication Framework to craft a compelling message that earns support from stakeholders and sets your plan in motion.

What is the challenge or opportunity you can address?

Identify a real challenge in your team, department, or organization that's either causing friction or represents a big opportunity.

What mindset shifts will help?

Choose one or two of the six IMPACT Driver mindset shifts that could help you lead others through this change.

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Who must you engage?

List one or two key stakeholders or team members you must bring with you on this journey through change.

What is the MVP version of this solution?

Think small. What is one minimum viable service, process, or fix you could implement to make measurable progress on this challenge?

What is the outcome this will drive?

Describe the specific result this MVP is designed to achieve.

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What IMPACT will this have on the organization?

Explain how this outcome supports business goals or addresses strategic needs.

How will you measure success?

Identify the metric(s) you'll use to prove that value was delivered.

Action Plan

What specific step will you take next week to get started?

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STAGE ONE: MINDSET	STAGE TWO: ASSESS	STAGE THREE: DEFINE
WEEK 1	WEEK 2-3	WEEK 4-6
Establish the foundation before taking action	Build trust and uncover real business challenges	Solve the right problems before building solutions
<input type="checkbox"/> Understand the full strategy lifecycle <input type="checkbox"/> Commit to the IMPACT Driver mindset <input type="checkbox"/> Reframe how success is defined <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Conduct stakeholder interviews <input type="checkbox"/> Capture challenges and opportunities <input type="checkbox"/> Assess strategy delivery today <input type="checkbox"/> Identify challenges and opportunities <input type="checkbox"/> Review and prioritize with leaders <input type="checkbox"/> _____	<input type="checkbox"/> Perform root cause analysis on top issues <input type="checkbox"/> Identify solutions to address root causes <input type="checkbox"/> Map solutions across the strategy lifecycle <input type="checkbox"/> Create the initial IMPACT Delivery Model <input type="checkbox"/> _____ <input type="checkbox"/> _____
NOTES	NOTES	NOTES
Where is strategy delivery breaking down? Which mindset shift matters most now?	Stakeholders identified: Themes emerging: Priorities communicated:	Root causes identified: Lifecycle-aligned solutions: Initial Delivery Model notes:

STAGE FOUR: PLAN	STAGE FIVE: DELIVER	STAGE SIX: EVOLVE
WEEK 7-8	WEEK 9-12	WEEK 13
Create clarity and alignment before delivery	Deliver value while bringing people with you	Measure, learn, and set direction for the next cycle
<input type="checkbox"/> Update the IMPACT Delivery Model <input type="checkbox"/> Define outcomes and expected IMPACT <input type="checkbox"/> Create the IMPACT Delivery Road Map <input type="checkbox"/> Review and prioritize leaders <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Build the MVP version of the first service <input type="checkbox"/> Pilot the service with initial stakeholders <input type="checkbox"/> Communicate outcomes and value <input type="checkbox"/> Observe adoption, resistance, results <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Measure results from the first cycle <input type="checkbox"/> Evaluate value and IMPACT achieved <input type="checkbox"/> Identify required adjustments <input type="checkbox"/> Define focus for next IES cycle <input type="checkbox"/> _____ <input type="checkbox"/> _____
NOTES	NOTES	NOTES
Road Map highlights: Confirmed priorities: Tradeoffs made:	MVP service delivered: Stakeholders involved: Early outcomes observed:	Results measured: Lessons learned: Next cycle focus:

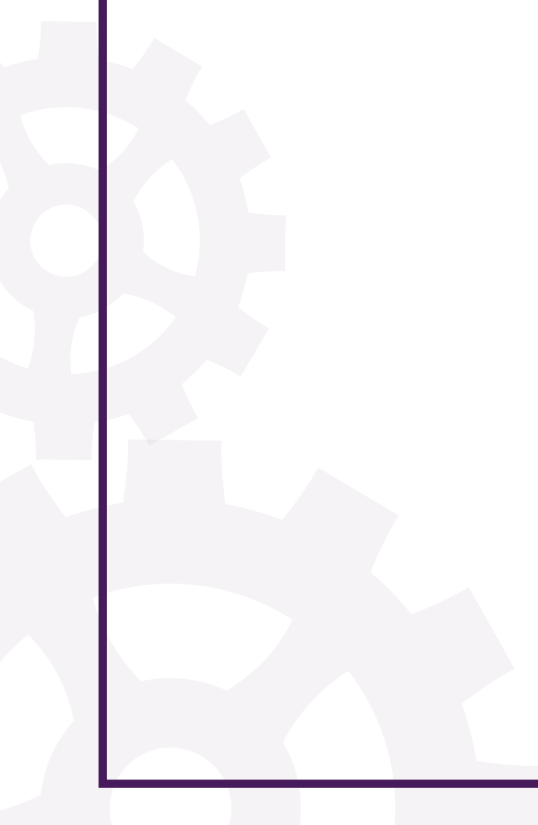
STEP	DESCRIPTION
CHALLENGE / OPPORTUNITY	
SOLUTION	
OUTCOME	
IMPACT	
METRIC	

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KEY TAKEAWAYS

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NOTES

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IMPACT ENGINE PRACTITIONER

Hello, fellow IMPACT Driver!

Congratulations! You've done more than complete a program—you've begun a fundamental shift in how you think about your role, your influence, and the value you are capable of delivering.

This IMPACT Engine Practitioner experience was designed as a starting point, not an endpoint. You've been introduced to an operating model that connects strategy to execution and execution to real business results. You now understand how IMPACT is created across the strategy lifecycle—and why mindset must come before tools and process.



We know the reality you're working in.

You're leading change in complex environments, often without full authority, navigating priorities, resistance, and expectations that don't always align. It can feel isolating. We've been there. I've lived it. And that's exactly why this work exists.

What comes next is application.

Using what you've learned to guide decisions, engage leaders, and deliver outcomes in your organization. IMPACT isn't delivered in a single moment—it's built, refined, and sustained over time.

And you don't have to do that alone.

As you continue your journey, here are a few ways we can keep moving forward together:

- **PMO Strategies Podcast** - Ongoing insights, strategies, and real-world perspectives to help you stay focused and keep moving forward.
- **IMPACT Engine System** - A deeper, hands-on operating model to help you embed this way of working and deliver measurable business value.
- **IMPACT Accelerator Mastermind** - Advanced training, applied coaching, and a community of peers committed to growing as enterprise-level leaders.

This may be the end of the workbook, but it's the beginning of what's possible.

Because IMPACT Drivers don't just manage projects.

They build IMPACT Engines.

Our journey together is just getting started, my friend! Let's do this!

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