# C-Suite Partnership

## Turning Great Ideas Into Fundable Growth Initiatives

"There is nothing so useless as doing efficiently that which should not be done at all."
— Peter Drucker

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# Presentation Overview

Topics

1. Introduction
2. 5 Building Blocks to Turn Ideas into Fundable Growth Initiatives
   a. Work Visibility & Accountability
   b. Organizational Alignment
   c. Enablement Mindset
   d. Repeatable Delivery
   e. Tech Enabled Strategic Value
3. Summary
4. Wrap up with the Handout
5. Q&A

# Tanduo

**Bryan Jorgensen**
Partner
Fractional CIO / CTO

About Bryan:

Technology leader passionate about building strong teams through clarity, coaching, and meaningful relationships. Enthusiast of motorsports and summer motorcycling, committed to helping leaders grow.

**WHY ?**

## Our Mission

To grow Leaders
- in our clients
- in ourselves
- in our communities

**Leaders who build high-quality, scalable organizations.**

**Josh Shafman**
Partner
Fractional CIO / CTO

About Josh:

Technology leader focused on developing excellent people, products, and technology. He has extensive experience scaling both small and large organizations and is an avid sports fan and video game hobbyist.

## Core Values

- Grow Together
- Be Transparent
- Feedback Fuels Growth
- Embrace Experiences
- Take Ownership

# What we do

We help organizations scale their people, process, technology, and data to achieve aggressive growth goals.

**Core Services**
Workshops
- Discovery Workshop (free)
- Deep Dive Workshop: 60-90 min
- Half Day Workshop: 4+ hrs
  - Includes prep, tools, exercises, and follow up meeting

Solution Design Teams
- Business process analysis and work to define technology products
- Scaling Readiness work to build a business technology roadmap
- Technology Selection, including Buy vs Build analysis

Delivery Teams
- Deliver on multi-year roadmap
- Build Product & Tools
- Integrate Systems with one another

*Additionally:*
Executive Coaching
- Tanduo's Leadership Development Program designed for Business Technology Leaderships. For CEO, CFO, CIO/CTO, VP of IT, or Dir of IT in high growth technology focused companies.
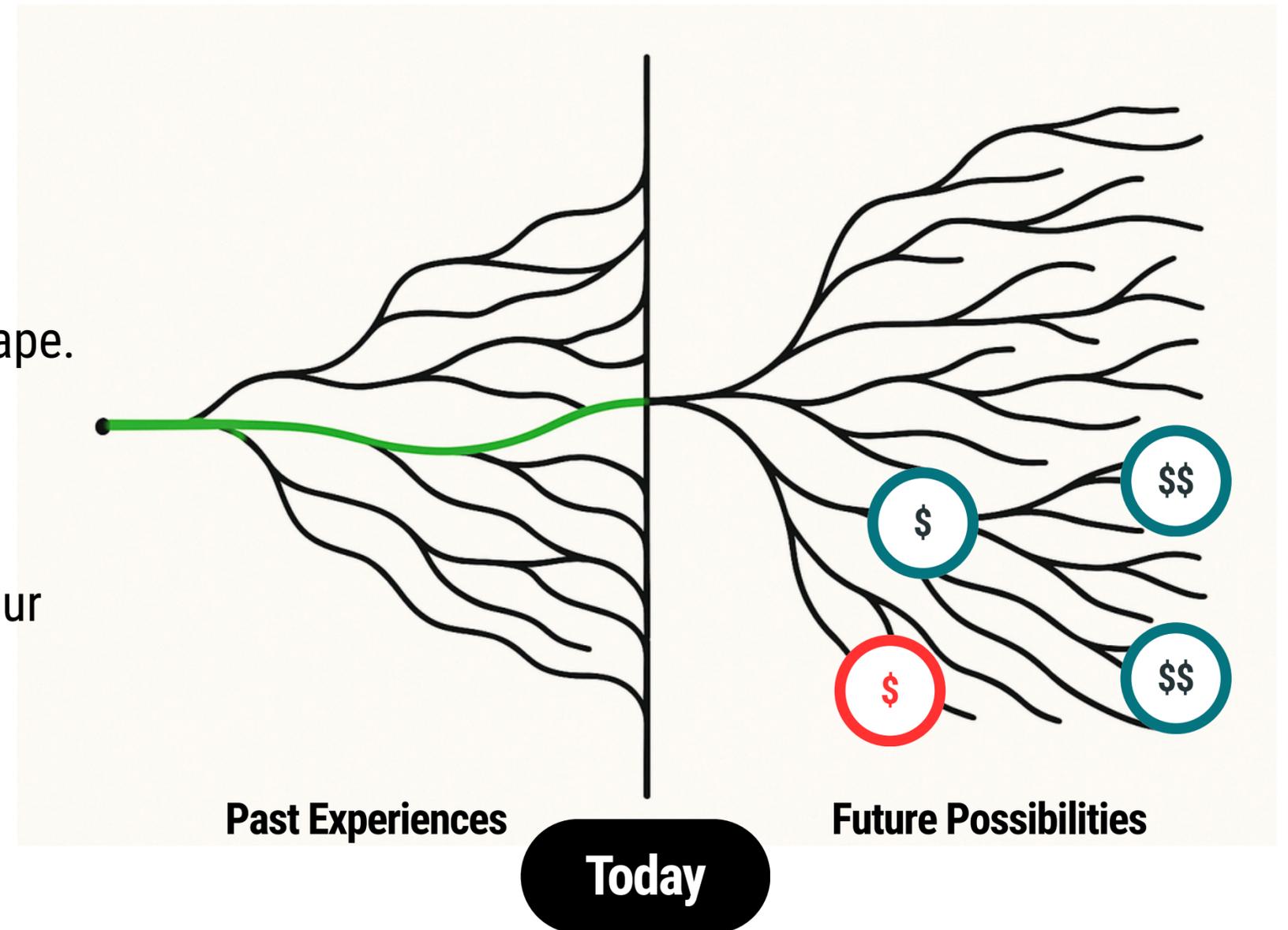
Transformation Accelerators
- Project Management Office Accelerator
- Agile Project Management Accelerator
- CIO/CTO Strategy Accelerator
- Product Management Accelerator

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# Struggles Financial Leaders Face Today

**Exercise:**

Write down 3 struggles finance has in today's landscape.

- 1 min to write struggles down
- 4 min to share one struggle from each person at your tables.



Past Experiences

Future Possibilities

Today

# Struggles Financial Leaders Face Today

| Problem | Impact |
| --- | --- |
| Low ROI on transformation spend | • **Leadership loses confidence in future investments**<br>• Investments don't translate to measurable outcomes |
| Hidden work & Lack of Work Visibility | • **Critical work lives in emails, tribal knowledge, or personal task lists**<br>• Leaders can't see what teams are actually spending time on<br>• Prevents fact-based decision-making<br>• Work is hard to prioritize, silos thrive, collaboration is hard |
| Data is hard to trust or use | • Data lives in disconnected systems<br>• Reporting requires manual reconciliation<br>• **People forced into reactive decision-making**<br>• Finance spends more time assembling data than interpreting it |
| Incosinstent delivery | • Unpredictable outcomes undermine ROI and trust<br>• **Teams over-commit and under-deliver** |
| Too much responsibility on finance to be the final gate | • **Finance becomes a bottleneck for decisions**<br>• CFOs must make technical & funding decisions without visibility |

*These struggles create funding risk due to results that are not repeatable*

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# Scaling Readiness Model

## 5 Building Blocks to Improving ROI

| | |
|---|---|
| **Tech Enabled Strategic Value** | Learn, adapt, innovate, and experiment with confidence |
| **Repeatable Delivery** | Systematically deliver repeatable value |
| **Enablement Mindset** | Scale your focus with cross organizational help and support |
| **Organizational Alignment** | Sync priorities across the organization creating alignment that fuels focused delivery |
| **Work Visibility & Accountability** | Ability for all levels to see the work getting done, learn from it, and hold each other accountable |

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# Our Goal
## Getting to Strategic Value and Repeatable Delivery
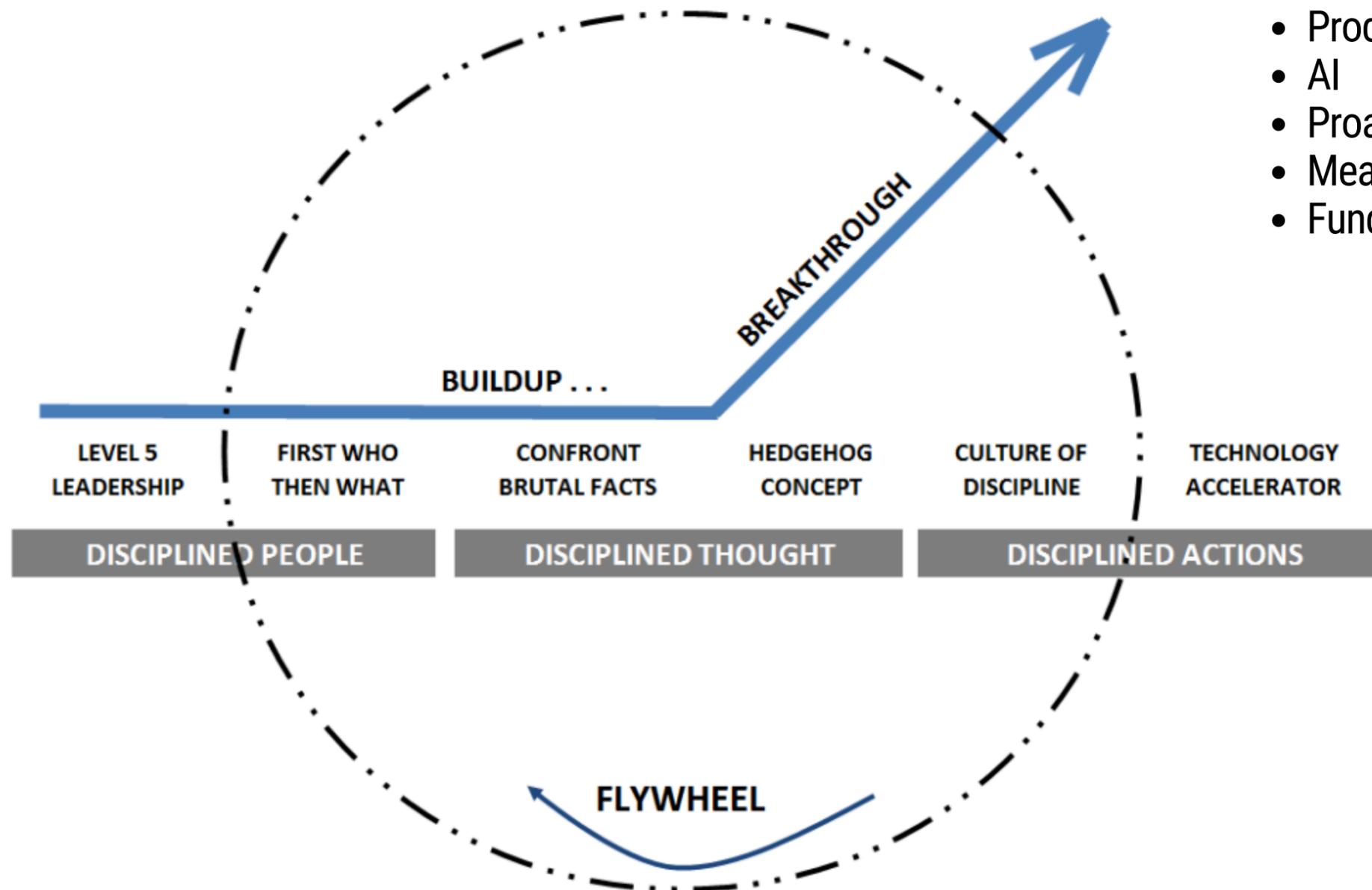


Art of the Possible
- Product Focus
- AI
- Proactive Planning
- Measured ROI
- Funding Levers based on impact

BREAKTHROUGH

BUILDUP . . .

| LEVEL 5 LEADERSHIP | FIRST WHO THEN WHAT | CONFRONT BRUTAL FACTS | HEDGEHOG CONCEPT | CULTURE OF DISCIPLINE | TECHNOLOGY ACCELERATOR |

DISCIPLINED PEOPLE    DISCIPLINED THOUGHT    DISCIPLINED ACTIONS

FLYWHEEL

# Work Visibility and Accountability

If the work isn't visible:
- it doesn't exist
- it isn't done well
- it creates politics

Accountable teams:
- create documentation as evidence of work done well
- escalate and voice problems
- care about the broader organization and its goals
- do what they say

# Work Visibility and Accountability

Actions to take:

1. Build systems that create work visibility.
2. Require evidence-based updates while allowing narrative to enhance, not replace, the evidence.
3. Standardize the KPIs that drive delivery, capacity, and ROI.
4. Establish weekly operating rhythms that generate consistent, reliable evidence.
    a. EOS, Pinnacle, Agile, etc.
5. Fund teams and initiatives based on predictability and visibility, not their volume of activity.

*As a finance leader, the work you help fund and don't help fund is one of the strongest ways to create good behaviors across the organization.*

# Organizational Alignment

## "Funding investments is actually funding people's focus."

| When Focus Is Funded Well | When Focus Isn't Funded Well |
|---|---|
| Everyone knows what matters right now. | Teams choose their own priorities. |
| Work maps directly to strategic goals and business value. | Work drifts toward the loudest voice, not the highest value. |
| Resources flow to the highest-ROI initiatives. | Resources are spread thin; nothing gets fully delivered. |
| Delivery speeds up because the reduction in friction and rework creates positive momentum. | Delivery slows down; blockers and rework multiply, requiring individual heroics. |
| Leaders make decisions quickly because everyone shares context. | Leaders re-explain and re-decide constantly. |
| Teams build momentum through clarity and confidence. | Momentum collapses, teams stay busy but don't move the company forward. |

# Investing in Focus:
## Minimum Viable Product (MVP)

**MVP - Minimum Viable Product**

Minimum Viability: Validate that the minimum work required solves the real customer problem, using KPIs, not opinions.

Measure value with KPI's and basics of work visibility

Good MVP's start with:
- A clear vision of where we're going
- Measurable goals/KPIs to know when we've arrived
- Anchored in learning for the organization, to improve investments



**Client Vision Example:**
We need our RFP process to require less overhead, less hands, and more repeatable steps

**MVP 1:**
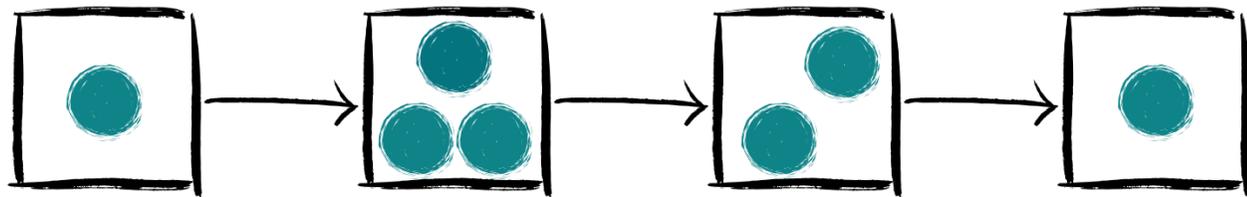Basic data platform that measure current state KPI on time to deliver RFP

**MVP 2:**
Minimum required RFP checklist for basic repeatability and measuring improvement

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# Elevating Decisions
## Find and Align on the Highest ROI Investment
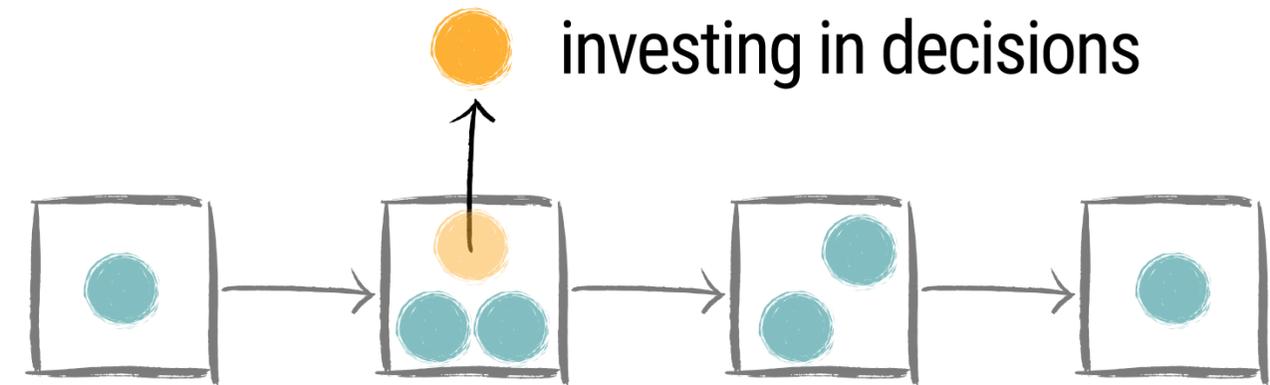
**What most companies do:**

invest in all steps of a process

average ROI from investment

**What companies that scale do:**

investing in decisions

**high ROI from investment**

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# Enablement Mindset

With visibility and alignment in place,
leaders **shift from directing work to designing how teams operate**.

## What Leaders Provide

- **Behavioral Standards**: How we communicate, escalate, decide, and collaborate.
- **Delivery Patterns**: Shared cadences for planning, updating, reviewing, and improving.
- **Tools + Systems:** Shared workspaces that allow teams to self-govern without constant oversight.
- **Areas of Ownership**: What teams own, what leaders own, when to elevate.
- **Empowerment**: Leaders remove blockers, protect focus, and let teams run.

## What Teams Can Do When Enabled

- Operate independently without needing constant leader intervention.
- Make faster decisions because the rules of engagement are clear.
- Hold themselves accountable using the same behaviors and rhythms as other teams.
- Deliver predictably because patterns create consistency.
- Collaborate cross-functionally without misalignment or friction.
- Scale because the organization operates the same way across teams.

Enablement is not hands-off leadership, it's structured autonomy.

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# Investing in Focus:
## One-Way & Two-Way Doors

**Use the right level of preparation based on how reversible the decision is.**

Use Discernment
- Not every decision needs perfection.

Learn Through the Process
- Some decisions require action first, learning second.

Prepare at the Right Level
- Reversible decisions: act fast, course-correct.
- Irreversible decisions: prepare appropriately, but don't freeze.

The right amount of preparation
- You CAN over prep
  - Ex. Moving a box from one side of a room to another
    - I can just move it back no harm done
- You CAN under prep
  - Ex. I am going to perform heart surgery
    - Lives are at stake
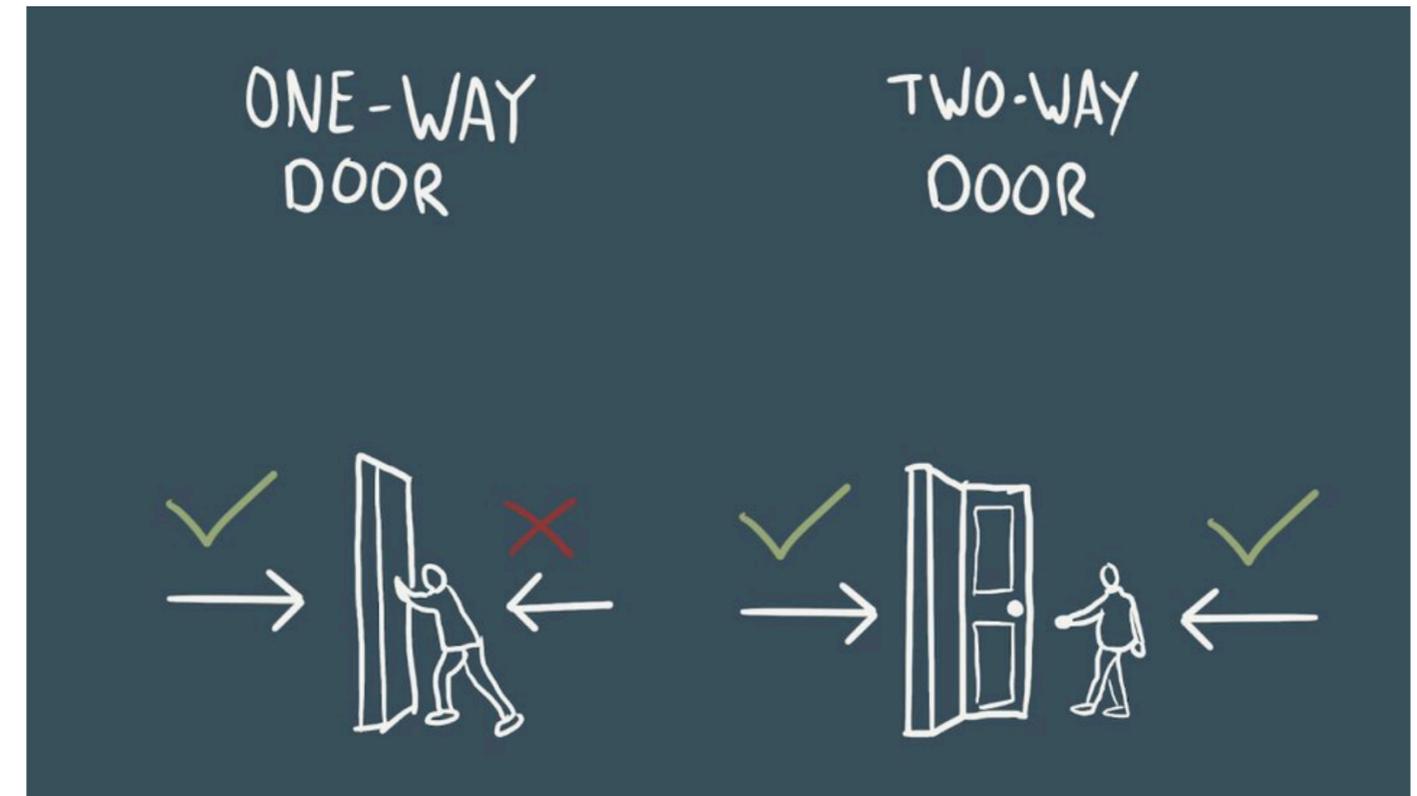
**Act fast on reversible decisions; reserve deep preparation for the ones that truly matter.**

# Repeatable Delivery

When visibility, alignment, and enablement are in place,
**organizations gain the ability to deliver fast, consistently, and confidently.**

## What Repeatable Delivery Looks Like

- **Momentum**: Work flows smoothly because friction is removed and patterns are established.
- **Minimize Pivot Cost**: When priorities shift, teams adapt quickly because the operating system is stable.
- **Work is easy to track and forecast:** Visibility makes it clear when work is on/ off-track early.
- **Consistency**: Consistent patterns reduce errors and variability no matter the speed and lead to quality.
- **Common Practices:** Cross-team collaboration becomes fast and natural.

## What Repeatable Delivery Enables

- High-impact initiatives get knocked out of the park. Execution capacity is unlocked and ready to deploy.
- Leaders can accelerate or slow work without disruption. Because the system makes capacity and bottlenecks obvious.
- Resource decisions become sharper. Knowing exactly how work flows allows better funding and staffing choices.
- Teams deliver more with fewer blockers. The system handles coordination, not heroics.
- Momentum compounds over time. Each cycle strengthens the next one, creating reliable forward motion.

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# Tech Enabled Strategic Value
## People, process, data, and technology multiply at this stage

**Funding ideas is all about pace and market opportunity!**

Because at this stage the company can finally:
- Learn fast (reducing cost of delay)
- Innovate confidently (because risk is controlled, not assumed)
- Experiment safely (cheap, reversible tests instead of expensive bets)
- Chase high-growth opportunities at the speed the market demands

**Watch outs:**
1. Continuous Effort is required to stay at this stage
2. Misalignment creeps back in during rapid growth
3. Tech can outpace process maturity

| People | Process | Data | Technology |
|---|---|---|---|
| Empowered, self-governed teams who move fast and take ownership. | Consistent, repeatable patterns that create predictable delivery. | Clear visibility into work, outcomes, and capacity – enabling confident decisions. | Tools that accelerate execution, lower friction, and amplify organizational speed. |
| Teams can adapt and pivot quickly because expectations are clear. | Work is easy to start, stop, accelerate, or redirect based on strategy. | Leaders see early where work is off-track, enabling timely intervention. | Experiments become cheap and safe, increasing learning pace. |
| Decisions happen close to the work, reducing leadership bottlenecks. | Organizations scale without adding heavy layers of coordination. | Priorities become validated with real evidence, not opinions. | Technology becomes a force multiplier, not a cost center. |
| The organization gains momentum through people who operate with confidence. | Teams deliver consistently across functions, enabling cross-team speed. | Data exposes the highest-ROI opportunities to pursue. | High-growth opportunities can be chased at market speed. |

# 5 Building Blocks

## Turning Great Ideas Into Fundable Growth Initiatives

### Building Blocks to Improving ROI

Work Visibility & Accountability
- If the work isn't visible, it doesn't exist.

Organizational Alignment
- Funding creates focus.

Enablement Mindset
- Design how teams work together.

Repeatable Delivery
- Build momentum you can steer at any speed.

Tech-Enabled Strategic Value
- Use technology to lead your market

### Follow-Up Questions

Where do you lack visibility that prevents you from funding higher-growth opportunities?

Are leaders staying too high-level when teams actually need clear priorities and alignment?

Which workflows are slowing you down today?
- What decisions inside those workflows drive the most cost, delay, or risk?

What decisions are you treating like One-Way doors, that are reversible Two-Way doors?

Are you pivoting often, but not gaining real traction toward your goals?

**Scaling Without the Waste: A CXO Workshop on Funding What Matters**
March 18th from 11:00-11:45am

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*Also, feel free to reach out on LinkedIn.*

"High ROI comes from the company's ability to pursue opportunities quickly and stop low-value work just as fast"

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