

CHAPTER 6

Transformation Roadmaps and Value Realisation

Delivering Strategic Value in Waves

“A roadmap is not a schedule of activities; it is a commitment to business value realised through strategic execution.”

Having justified the investment, the organisation must now prove it can deliver on it.

EXECUTIVE PERSPECTIVE

The approval had come through.

Eighty million euros, authorised by the board for a three-year transformation programme. The business case had been compelling. The framework was understood. Executive sponsorship was confirmed.

Now came the question that determines whether approval translates into success:

How do we actually execute this?

For Nordic Ventures Group, the journey from twelve distributed datacentres to a modern Azure platform cannot be treated as a single migration event. The organisation operates across fourteen countries. Five factories depend on continuous technology availability. Six thousand users require uninterrupted productivity. One hundred eighty applications must be addressed, each with its own dependencies, requirements, and stakeholders.

Attempting to transform everything simultaneously would create chaos. Proceeding without a coherent sequence would allow complexity to overwhelm capacity. Measuring success by technical completion

rather than business value would repeat the failures that transformation was meant to address.

A transformation roadmap connects strategic ambition with practical execution. It defines when value will be realised, which risks must be reduced first, how operational continuity will be protected, and how leadership will measure progress.

The roadmap organises the transformation into controlled waves, each designed to create measurable business value while preparing the organisation for the next stage.

WHY THIS CHAPTER MATTERS

Transformation programmes fail when they attempt to do everything immediately.

I have observed this pattern repeatedly. Organisations secure approval for ambitious initiatives, then deploy resources across multiple workstreams without clear priority or sequence. Complexity overwhelms delivery capacity. Dependencies create cascading delays. Stakeholder confidence erodes as milestones slip. Costs escalate while value remains elusive.

The roadmap provides the discipline that prevents these failure patterns.

It forces explicit decisions about sequencing, priority, and resource allocation. It creates checkpoints where progress can be validated and direction can be adjusted. It establishes the accountability structures that ensure value is realised rather than merely projected.

For the Trusted Advisor, the roadmap is the instrument through which strategy becomes execution. Mastery of roadmap construction and management is essential to guiding enterprise transformation successfully.

LEARNING OBJECTIVES

Upon completing this chapter, the reader will be able to:

1. Design transformation roadmaps that balance value delivery with risk management

2. Sequence migration waves according to business value, dependencies, and organisational readiness
3. Define success criteria that demonstrate value at each transformation stage
4. Anticipate and mitigate common roadmap risks
5. Construct executive dashboards that communicate progress in business terms

ACADEMIC FOUNDATION

Roadmap design draws upon several disciplines that inform how organisations plan and execute complex programmes.

Programme Management

The discipline of programme management provides frameworks for coordinating multiple related projects toward shared objectives (Project Management Institute, 2017). Unlike project management, which focuses on delivering specific outputs, programme management focuses on realising strategic benefits through the collective impact of component projects.

The transformation roadmap applies programme management principles at enterprise scale, coordinating technical implementation, organisational change, and value realisation across multiple years and organisational boundaries.

Staged Transformation

Research by John Kotter established that successful organisational change proceeds through defined stages, each building upon its predecessor (Kotter, 2012). Attempting to skip stages or accelerate inappropriately often produces failure.

This research informs the wave-based approach to transformation roadmaps. Each wave addresses the prerequisites for subsequent waves. Organisations that attempt to pursue Wave Three activities before completing Wave One activities discover that their acceleration has created delays.

Value Stream Mapping

Techniques from lean manufacturing enable identification of value-creating activities and elimination of waste (Rother and Shook, 1999).

Applied to transformation roadmaps, these techniques help identify which activities directly contribute to value and which create unnecessary delay or complexity. Not every activity traditionally included in transformation programmes creates proportional value.

Dependency Management

Complex transformations involve numerous dependencies between workloads, systems, teams, and external parties. Research on critical path analysis and dependency management informs how roadmaps sequence activities to minimise delay and risk (Elmaghraby, 1995).

REAL ENTERPRISE STORY

The Roadmap That Delivered Value

The transformation programme had an eighteen-month plan, a clear budget, and executive sponsorship.

It also had a fundamental problem: the roadmap was organised by technical domain rather than business value.

Year one focused on infrastructure. Year two focused on applications. Year three focused on data and analytics. This structure appeared logical from an engineering perspective—each domain building on the one before.

Six months into execution, problems emerged.

Infrastructure migration could not proceed without application changes. Application teams lacked visibility into infrastructure timelines. Business stakeholders saw no value from year one activities. Executive confidence declined.

“We’ve been doing this for six months,” the CEO observed, “and nothing has improved for the business.”

She was right. The roadmap had optimised for technical sequence rather than value delivery. The organisation was building capabilities that would eventually create value, but eventually was too distant for stakeholders who needed evidence that transformation was worth the disruption.

We restructured the roadmap around a wave-based approach organised by business value rather than technical domain.

Wave One focused on foundation and early value: establishing the landing zone, proving operational processes, and migrating a carefully selected set of workloads that would demonstrate capability while reducing risk.

The selected workloads were not the most complex—they were the most instructive. Their successful migration would prove the platform, validate processes, and create confidence.

Wave Two focused on consolidation and cost realisation: systematically migrating workloads that would enable datacentre exit, retiring legacy systems, and demonstrating progress against the cost-reduction target.

Wave Three focused on innovation and differentiation: enabling advanced analytics, deploying operational AI, and creating capabilities that would differentiate the organisation competitively.

Each wave had defined success criteria, named owners, and executive-visible metrics. Progress was reported monthly against business outcomes rather than technical completion.

The restructured programme delivered its objectives. More importantly, it maintained executive confidence throughout execution because each wave produced visible value.

The lesson was clear: roadmaps must be organised around value delivery, not technical convenience.

ROADMAP DESIGN PRINCIPLES

Effective transformation roadmaps reflect several principles that distinguish successful programmes from those that fail.

Business Value Before Activity

Every initiative must be connected to a measurable business outcome.

This principle seems obvious, but its application requires discipline. Technical teams naturally organise work around technical dependencies. The roadmap must impose a different logic: activities are sequenced according to the value they create, not merely the technical relationships between them.

Activities that cannot demonstrate clear value connection should be questioned and potentially eliminated.

Dependencies Before Dates

Application, identity, network, data, personnel, and contract dependencies shape the schedule.

Dates should emerge from dependency analysis rather than being imposed arbitrarily. When executives request specific completion dates, the roadmap team should respond with dependency analysis: achieving this date requires completing these prerequisites by these milestones.

Arbitrary dates create pressure that produces shortcuts. Shortcuts create technical debt. Technical debt undermines the value that transformation was meant to create.

Risk Before Speed

Critical workloads move only when foundation, recovery, and operations are ready.

The pressure to accelerate is constant. Executives want results. Teams want to demonstrate progress. Vendors want to close transactions. All of these pressures encourage movement before readiness.

The Trusted Advisor resists this pressure by asking uncomfortable questions. What happens if this migration fails? What is the recovery process? Who is responsible for operations in the target state? Have we tested these processes?

Organisations that answer these questions before migration avoid the incidents that destroy confidence and delay programmes.

Value in Every Wave

Each wave must deliver visible outcomes that preserve confidence and momentum.

Transformation programmes that defer all value to the final phase lose executive support before reaching that phase. Stakeholders experience cost and disruption without experiencing benefit. Their patience erodes.

The roadmap should be structured so that each wave creates demonstrable value. Even foundational activities—which do not deliver direct business outcomes—should be positioned as risk reduction and capability creation.

THE THREE-WAVE TRANSFORMATION MODEL

The transformation is organised into three primary waves, each with distinct focus and expected value.

Wave	Primary Focus	Strategic Value	Duration
Wave One: Foundation, Governance, and Early Validation	Establishing the enterprise foundation and validating capability through controlled pilot deployments.	Reduced risk and increased confidence that the transformation approach is sound.	Typically six to nine months.

Wave	Primary Focus	Strategic Value	Duration
Wave Two: Consolidation and Core Modernisation	Systematically migrating workloads, exiting datacentres, and realising cost benefits.	Cost reduction and operational simplification.	Typically twelve to eighteen months.
Wave Three: Innovation, Data, and International Growth	Enabling advanced capabilities, deploying AI and analytics, and supporting international expansion.	Competitive advantage and business acceleration.	Typically twelve to eighteen months, continuing beyond initial programme completion.

WAVE ONE: FOUNDATION, GOVERNANCE, AND EARLY VALIDATION

Wave One establishes the enterprise foundation that all subsequent waves depend upon.

This wave requires patience. Executive stakeholders want to see workloads moving; Wave One produces capabilities rather than migrations. The Trusted Advisor must help stakeholders understand that this investment prevents the problems that have undermined previous transformation attempts.

Enterprise Landing Zone

The landing zone includes management group hierarchy, subscription structure, identity integration, network connectivity, security baselines, policy enforcement, monitoring configuration, backup services, and cost governance mechanisms.

Each component represents decisions that will shape every subsequent deployment. Taking time to make these decisions well is more efficient than accepting defaults and correcting them later.

Security and Compliance Baselines

Security and compliance controls must be established for all fourteen countries in which Nordic Ventures Group operates.

These controls must address NIS2 and GDPR requirements as well as industry-specific obligations. Different countries have different requirements; the architecture must accommodate this variation without fragmenting governance.

Pilot Workloads

Carefully selected pilot workloads validate that the landing zone functions as designed.

Pilots should test identity integration, network connectivity, policy enforcement, monitoring effectiveness, automation pipelines, and support processes. The goal is not to migrate production workloads but to prove capability.

Pilot selection is strategic. Choose workloads that will expose potential problems early—before those problems affect critical systems.

Organisational Readiness

Wave One establishes the organisational capabilities required for transformation.

The Cloud Centre of Excellence creates centralised expertise and governance. The Cloud Academy develops skills across the organisation. Local champions in each region create distributed ownership. FinOps practices establish cost management discipline.

FRAMEWORK 6.1: WAVE ONE SUCCESS CRITERIA

Area	Success Criterion
Platform	Landing zone is deployed, configured, and approved for production workloads

Area	Success Criterion
Security	Required identity and security controls are implemented and validated
Governance	Policy compliance exceeds agreed threshold across all deployed resources
Cost	All deployed resources are tagged according to standards and covered by budgets
Operations	Monitoring, backup, and support processes are validated through pilot operations
Pilot	Initial pilot workloads are operating successfully with validated functionality
People	Core platform and application teams have completed required training

WAVE TWO: CONSOLIDATION AND CORE MODERNISATION

Wave Two executes the bulk of migration activity, systematically moving workloads to enable datacentre exit and cost realisation.

This wave is where the cost-reduction target is achieved—or missed. The discipline established in Wave One enables rapid, reliable execution in Wave Two.

Sequenced Datacentre Exit

Each datacentre exit requires workload inventory, dependency mapping, contract review, and confirmed closure dates.

Exit milestones must be managed actively. The most common failure pattern in cloud economics is prolonged dual running—continuing to pay for on-premises infrastructure after migration while also paying for

cloud infrastructure. This pattern destroys the business case.

Each datacentre exit should have a named owner accountable for closure. Closure should be contractually binding where possible—surrender the lease, terminate the contract, decommission the equipment.

Application Rationalisation

The one hundred eighty application portfolio, including the one hundred forty legacy applications, is addressed systematically.

Each application receives a rationalisation decision: retire, retain, rehost, replatform, refactor, or replace. Each decision has different cost and timeline implications.

Retirement decisions should be executed early. Every month an application continues to operate is a month of unnecessary cost.

Controlled Migration

Migration of SAP, enterprise resource planning, Dynamics 365 integrations, and manufacturing systems proceeds according to validated patterns.

Each migration validates the landing zone, operational processes, and support capabilities. Lessons from each migration improve subsequent migrations.

Financial Optimisation

Cost optimisation practices are implemented throughout Wave Two.

Rightsizing recommendations address over-provisioned resources. Reserved instance purchases reduce consumption costs. Scheduled shutdown eliminates charges for non-production environments during non-working hours. Storage lifecycle management moves infrequently accessed data to lower-cost tiers. Removal of idle resources eliminates waste.

FRAMEWORK 6.2: WAVE TWO SUCCESS CRITERIA

Area	Success Criterion
Datacentres	Closure milestones are achieved according to approved roadmap
Applications	Target workloads are migrated or rationalised according to plan
Cost	Run-rate savings are demonstrated against established baseline
Reliability	Critical systems meet availability targets in cloud environment
Operations	Incident volume and support complexity are reduced
Technical Debt	Legacy applications are retired or modernised according to targets
Adoption	Majority of new workloads use standardised platform capabilities

WAVE THREE: INNOVATION AND GLOBAL ACCELERATION

Wave Three extends beyond migration to create new value through advanced capabilities.

This wave justifies why transformation matters beyond cost reduction. It demonstrates that the platform enables capabilities the organisation could not achieve with its previous technology landscape.

AI-Driven Factory Operations

Use cases include predictive maintenance, anomaly detection, production forecasting, quality improvement, energy optimisation, and waste reduction.

Each use case has a business owner who validates expected value. Engineering enthusiasm is insufficient; business validation is required.

Enterprise Data Platform

The data platform integrates SAP, Dynamics 365, Microsoft 365, manufacturing systems, and selected external data sources.

Governed data becomes available for analytics, reporting, and AI model development. Data governance ensures that integration does not create compliance risk.

International Expansion Support

Reusable landing zones, identity onboarding processes, connectivity patterns, policy configurations, monitoring integration, and cost allocation mechanisms enable rapid deployment for new countries and acquisitions.

When the organisation enters a new market, the technology platform accelerates rather than constrains integration.

Platform Engineering Maturity

Approved infrastructure modules, automated deployment pipelines, reusable application patterns, and self-service capabilities enable application teams to move quickly within governed boundaries.

The platform becomes a product that internal teams consume, with defined service levels and continuous improvement.

FRAMEWORK 6.3: WAVE THREE SUCCESS CRITERIA

Area	Success Criterion
AI and Data	Use cases deliver verified operational value validated by business owners
Time-to-Market	Lead time for new digital services is reduced compared to baseline
Expansion	New environments are deployed through standardised patterns

Area	Success Criterion
Automation	Percentage of deployments that are fully automated increases
Platform Adoption	Application teams actively consume self-service capabilities
Business Value	Innovation benefits are validated by business owners with quantified impact

THE BOARDROOM CONVERSATION

“Show me the timeline.”

The Chief Operating Officer had listened patiently through the wave descriptions. Now she wanted specifics.

I walked to the whiteboard and drew three overlapping rectangles.

“Wave One: nine months. We establish the foundation, validate the platform, and prove we can operate reliably. At the end of Wave One, you have confidence—evidence that this approach works.”

“Wave Two: fifteen months, overlapping with the end of Wave One. We migrate systematically, exit datacentres, and realise cost savings. At the end of Wave Two, you have the cost reduction the business case promised—and proof in the financial statements.”

“Wave Three: begins in month eighteen, continues beyond the formal programme. We enable innovation, deploy AI, and support international expansion. At the end of Wave Three, you have capabilities your competitors don’t have—strategic advantage, not just operational improvement.”

She studied the diagram. “What’s the risk?”

“The greatest risk is impatience. Wave One doesn’t produce visible migrations. Executive stakeholders may pressure us to accelerate into Wave Two before

the foundation is solid. That pressure creates the conditions for failure.”

“How do we prevent that?”

“By demonstrating value in every wave—even Wave One. We communicate risk reduction, capability creation, and pilot success. We make stakeholders partners in foundation building rather than observers waiting for migration.”

She nodded. “What else?”

“Prolonged dual running. If we migrate workloads but don’t exit datacentres, costs increase rather than decrease. Every datacentre exit needs an owner accountable for closure—not migration, closure.”

“And the innovation wave?”

“Must be staged appropriately. Organisations that pursue aggressive innovation before establishing solid foundations create complexity without capturing value. We prove the platform, then we innovate on it.”

She turned to the CIO. “This is the most honest transformation timeline I’ve heard. Usually people tell me everything will be done in eighteen months.”

The CIO smiled. “This isn’t a project. It’s a transformation. The timeline reflects what it actually takes.”

ROADMAP RISKS AND MITIGATIONS

Transformation roadmaps face predictable risks that should be anticipated and mitigated.

Risk	What Could Go Wrong	Mitigation
Weak Foundation	An incomplete or inadequate landing zone creates future rework and security gaps.	Complete landing zone and governance validation before proceeding to Wave Two. Resist pressure to accelerate.

Risk	What Could Go Wrong	Mitigation
Unknown Dependencies	Undiscovered dependencies cause migration failure or unplanned downtime.	Thorough discovery, dependency mapping, and migration rehearsals. Invest in understanding before execution.
Prolonged Dual Running	Failure to exit datacentres erodes cost savings and extends complexity.	Committed datacentre exit milestones with accountable owners. Make closure contractually binding where possible.
Skills Shortage	Insufficient skills cause delivery delays and operational risk.	Cloud Academy development and targeted recruitment. Begin skills development early.
Resistance to Change	Organisational resistance produces low adoption and reappearance of silos.	Early engagement and local champion networks. Address resistance through dialogue, not authority.
Cost Growth	Uncontrolled cloud consumption causes business case deterioration.	FinOps practices, budgets, and continuous optimisation. Treat cost management as ongoing discipline, not one-time activity.
Overambitious Innovation	Premature focus on innovation distracts from core migration.	Stage innovation activities after foundational readiness is confirmed. Sequence appropriately.
Vendor or Contractual Delay	External dependencies cause missed milestones.	Early commercial and procurement planning. Engage vendors as partners.

FRAMEWORK 6.4: EXECUTIVE ROADMAP DASHBOARD

KPI	Target
Cost Reduction	Twenty-five percent reduction against agreed baseline
Datacentre Exits	Closure according to approved roadmap
Critical Workload Availability	Above 99.9 percent or agreed service target
Policy Compliance	Above agreed enterprise threshold
Migration Success Rate	Above ninety-five percent
Critical Recovery Tests	Successful completion against agreed objectives
User Satisfaction	Improvement after each major wave
Deployment Lead Time	Progressive reduction across the roadmap
Legacy Applications Retired	Tracked against portfolio target
AI Value Realisation	Verified value validated by business owners

EXECUTIVE REFLECTION

A successful roadmap does not attempt to do everything immediately.

It sequences work according to business value, risk, dependencies, organisational capacity, and readiness. It creates value in every wave. It measures success by business outcomes rather than technical completion.

Consider whether your roadmap demonstrates the following characteristics.

Does the roadmap describe activities or measurable business outcomes?

Are foundational controls established before critical workloads move?

Are datacentre exits scheduled with accountable owners?

Are dependencies mapped and sequenced appropriately?

Can you demonstrate progress to executive stakeholders after each wave?

Are promised benefits assigned to owners with measurable targets?

Organisations whose roadmaps exhibit these characteristics are positioned for sustained transformation success.

EXECUTIVE CHECKLIST

Wave One Readiness

1. Landing zone design is complete and validated
2. Security and compliance baselines are defined
3. Pilot workloads are selected and prepared
4. Organisational capabilities are being developed
5. Success criteria are defined and agreed

Wave Two Readiness

1. Foundation is proven through pilot operations
2. Migration patterns are validated
3. Datacentre exit milestones are committed
4. Application rationalisation decisions are made
5. Cost optimisation practices are established

Wave Three Readiness

1. Core migration is substantially complete
2. Platform stability is demonstrated
3. Innovation use cases are defined with business owners
4. International expansion requirements are understood
5. Platform engineering capabilities are maturing

KEY TAKEAWAYS

Principle	Implication
A roadmap is a value contract	It defines what value will be delivered, when, and by whom
Foundation comes before scale	A weak platform creates future cost, risk, and inconsistency
Migration must remove legacy cost	Cloud adoption without datacentre exit undermines the business case
Dependencies shape the sequence	Workloads move according to business and technical relationships
Every wave must create visible value	Early outcomes preserve confidence and executive sponsorship
Transformation includes people	Skills, communication, and adoption are part of every wave
Measure realised value	Technical completion does not prove business success

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TRUSTED ADVISOR PRINCIPLE

A transformation roadmap is not a project plan.

A project plan schedules activities.

A transformation roadmap commits to business outcomes.

The project plan asks: What will we do?

The roadmap asks: What will change?

The difference between these questions determines whether transformation delivers value or merely consumes budget.

The Trusted Advisor ensures that every wave, every milestone, every metric connects to the question that executives actually care about: Is this making our organisation better?

If you cannot answer that question at any point in the transformation, your roadmap has failed—regardless of how many workloads you have migrated.

Value realisation is not the final phase.

Value realisation is every phase.

Never lose sight of what you promised—and who is counting on you to deliver it.