



Building a Future- Proof Transformation Office

A Practical Guide for Global Leaders



Aric Wood

Chief Strategy Officer
Tigerhall

Glad to meet you!
About me...

- ✓ Author of “The Strategy Activation Playbook”
- ✓ Former CEO of change design consultancy **XPLANE** and strategy consultant at **Bain & Company**
- ✓ Former senior leader at **Intuit** and other tech companies
- ✓ Advisor to dozens of **Fortune 500** and global **Government, NGO, and Non-Profit** organizations leading change and transformation



Transformation Office Webinar Series

This 5-part webinar series provides senior executives and transformation leaders with a comprehensive playbook to establish, scale, and sustain a future-proof enterprise Transformation Office (TO).

- ✓ Why Transformation Capacity is a Competitive Advantage
- ✓ Transformation Models: Centralized, Distributed, and Hybrid
 - How to Set Up a Transformation Office
 - Sustaining the Transformation Capability Over Time
 - Executive Panel: Lessons Learned from Building and Leading TOs



In Our Last Episode...

“Transformation Models: Centralized, Distributed, and Hybrid ”

Point of View:

- 1) The correct model depends on your current structure, culture, and operating environment
 - 2) However, we all face a new and transformative future of exponentially accelerating change
 - 3) We must take both into account: Our context today and our operating environment tomorrow
- We will all need to evolve!

What is the Recommendation?

A well-designed, hybrid Transformation Office approach is the durable advantage of the future

- In an environment of perpetual transformation, only a model that supports both top-down direction and bottom-up adaptability can scale sustainably.
- It requires a common core of standardized change capability and an organizational culture of agility
- The most resilient organizations will not only choose the right model—they will continually evolve it.



Today's Objectives

We'll discuss a practical, step-by-step roadmap for establishing an enterprise-wide Transformation Office (TO) using a hybrid model that balances centralized strategic alignment and tools with localized flexibility and execution.

- ✓ Understand the **strategic rationale** for creating a hybrid Transformation Office and the risks of operating without one
- ✓ Learn the **eleven critical steps** to design, build, and operationalize a TO that drives alignment, speed, and sustained impact across business units and geographies.
- ✓ Identify **key success metrics**, including cultural and operational KPIs, to measure transformation progress and continuously improve the TO's performance.



Poll:

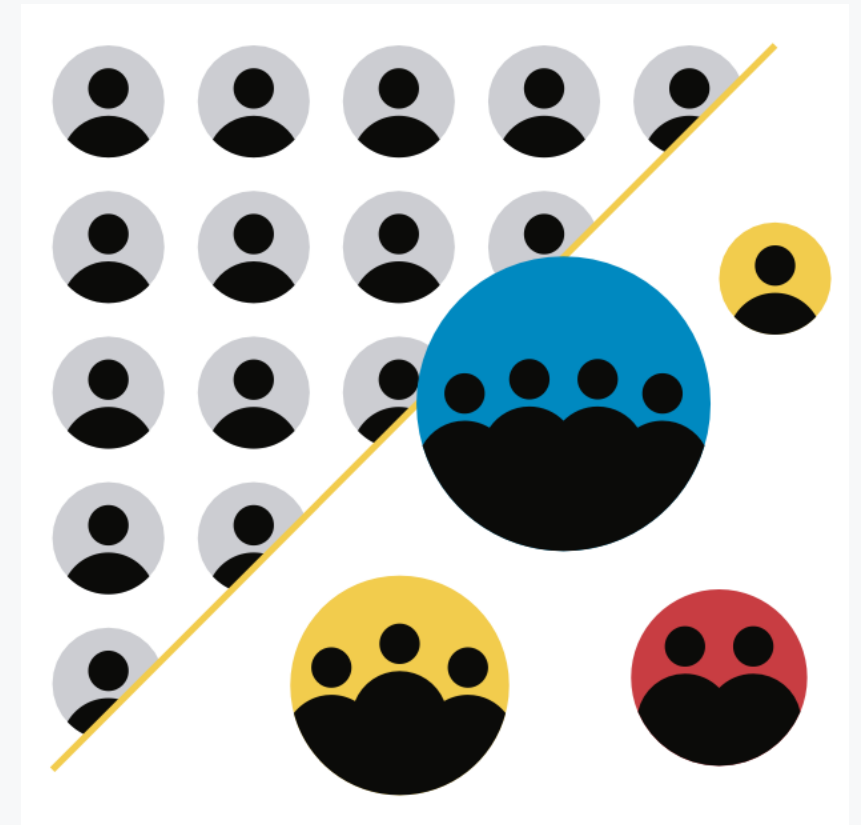
How would you describe the current maturity of your organization's Transformation Office? (or equivalent function)



Why do we need a Transformation Office?

In an era defined by rapid disruption, the ability to transform continuously and at scale is now a core competitive advantage

- *Many global organizations remain hindered by siloed efforts, fragmented change initiatives, and a lack of visibility across enterprise priorities*
- *Without a centralized TO, companies face misaligned investments, uneven execution, resistance to change, and an inability to deliver sustained impact.*
- *TOs become the strategic nerve center of the enterprise, enabling visibility, alignment, and acceleration across functions and geographies.*



The Pain of Change

Without a Transformation Office

Fragmented Change

Poor Strategic Alignment

Lack of Accountability

Slow Response to Change

Cultural Resistance

Limited ROI



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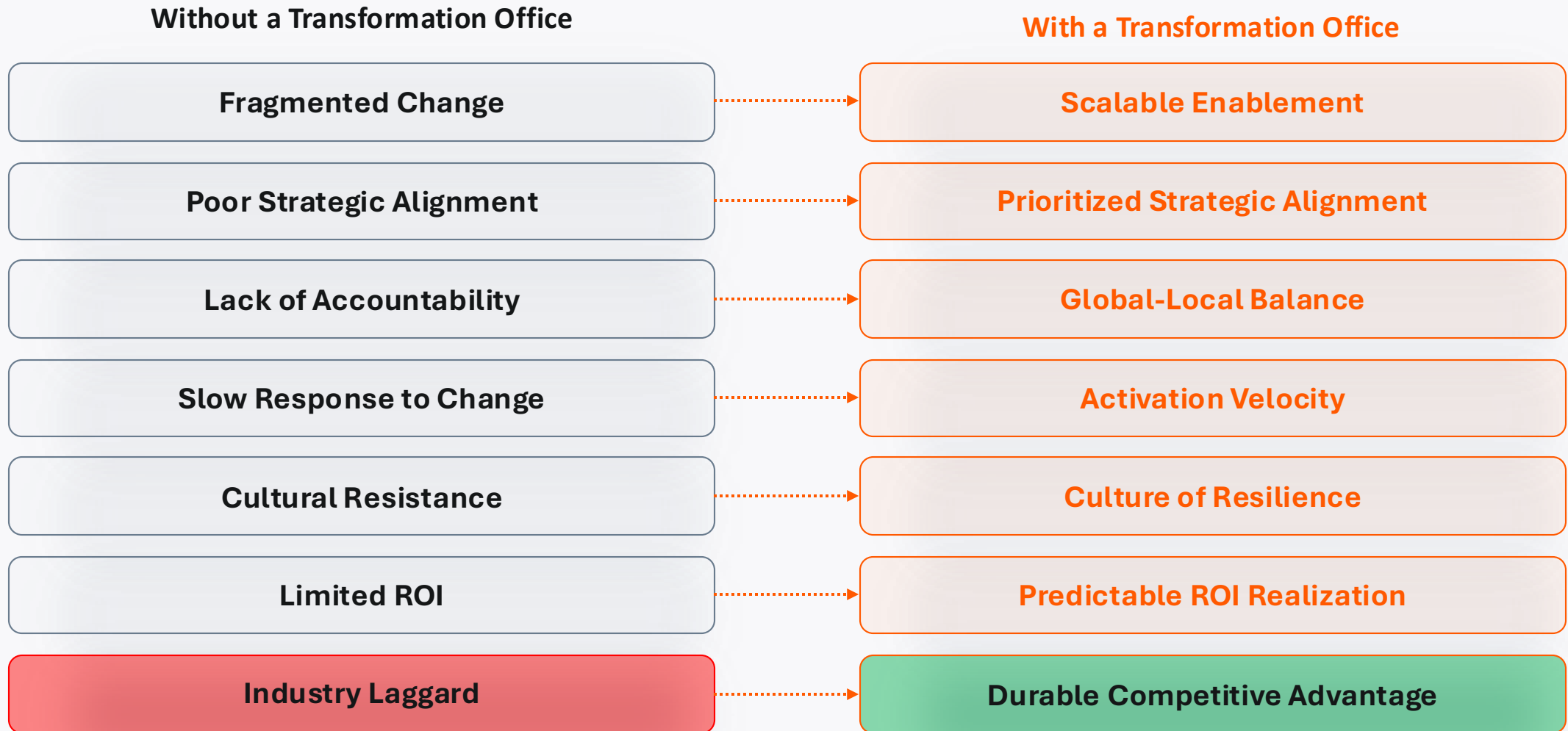
Cultural Resistance

Limited ROI

Industry Laggard



Transformation Capability: From Pain to Gain

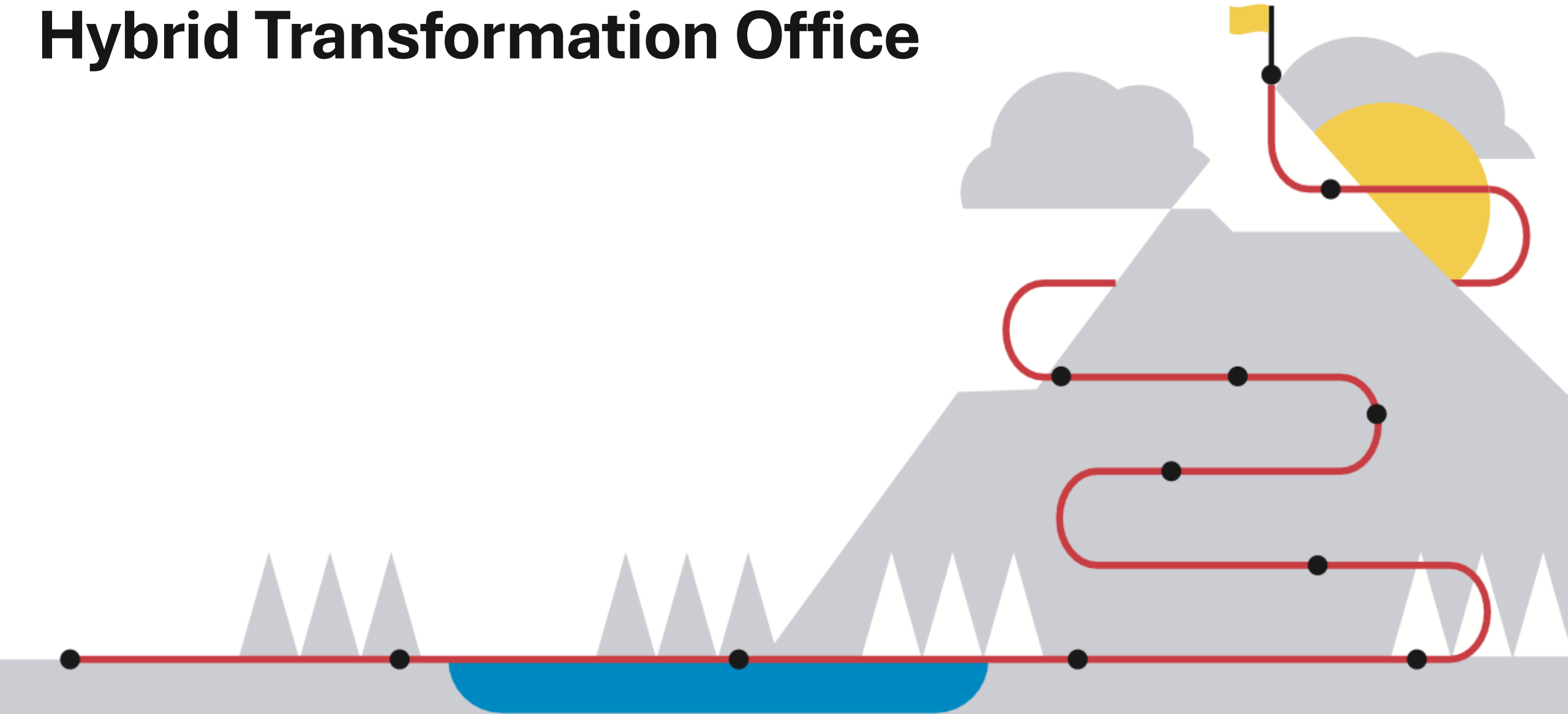


Point of View:

- 1) Without a dedicated Transformation Office, organizations face accelerating complexity with decreasing resilience, leading to competitive failure**
- 2) A hybrid Transformation Office and change-resilient culture mitigates these risks while delivering accelerated agility at scale.**
- 3) To create a durable competitive advantage, we need to develop the executive mandate and business case to future-proof our transformation capabilities**



A Eleven-Step Roadmap to Building a Hybrid Transformation Office



Step 1: Establish the Business Case and Executive Mandate

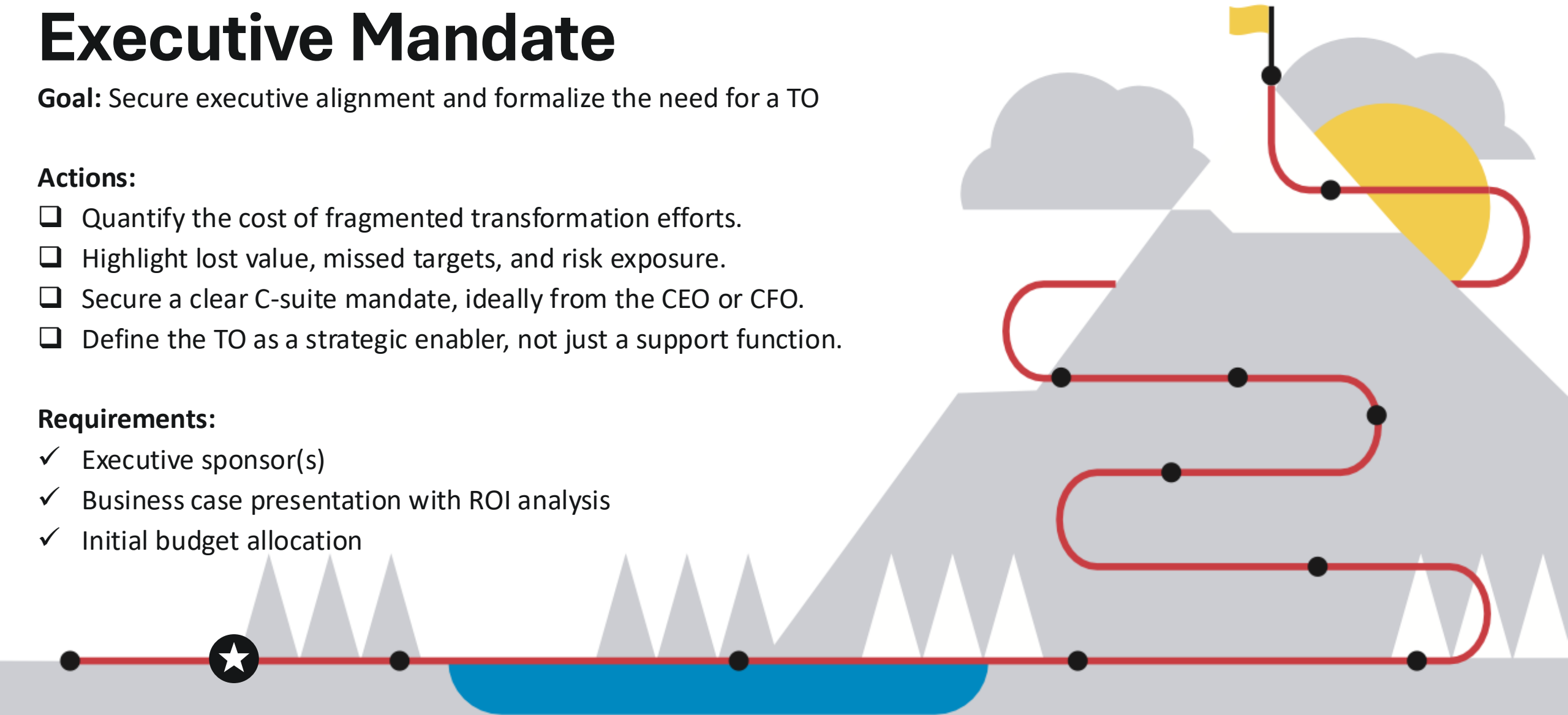
Goal: Secure executive alignment and formalize the need for a TO

Actions:

- ☐ Quantify the cost of fragmented transformation efforts.
- ☐ Highlight lost value, missed targets, and risk exposure.
- ☐ Secure a clear C-suite mandate, ideally from the CEO or CFO.
- ☐ Define the TO as a strategic enabler, not just a support function.

Requirements:

- ✓ Executive sponsor(s)
- ✓ Business case presentation with ROI analysis
- ✓ Initial budget allocation



Step 2: Define the TO's Mission, Scope, and Success Metrics

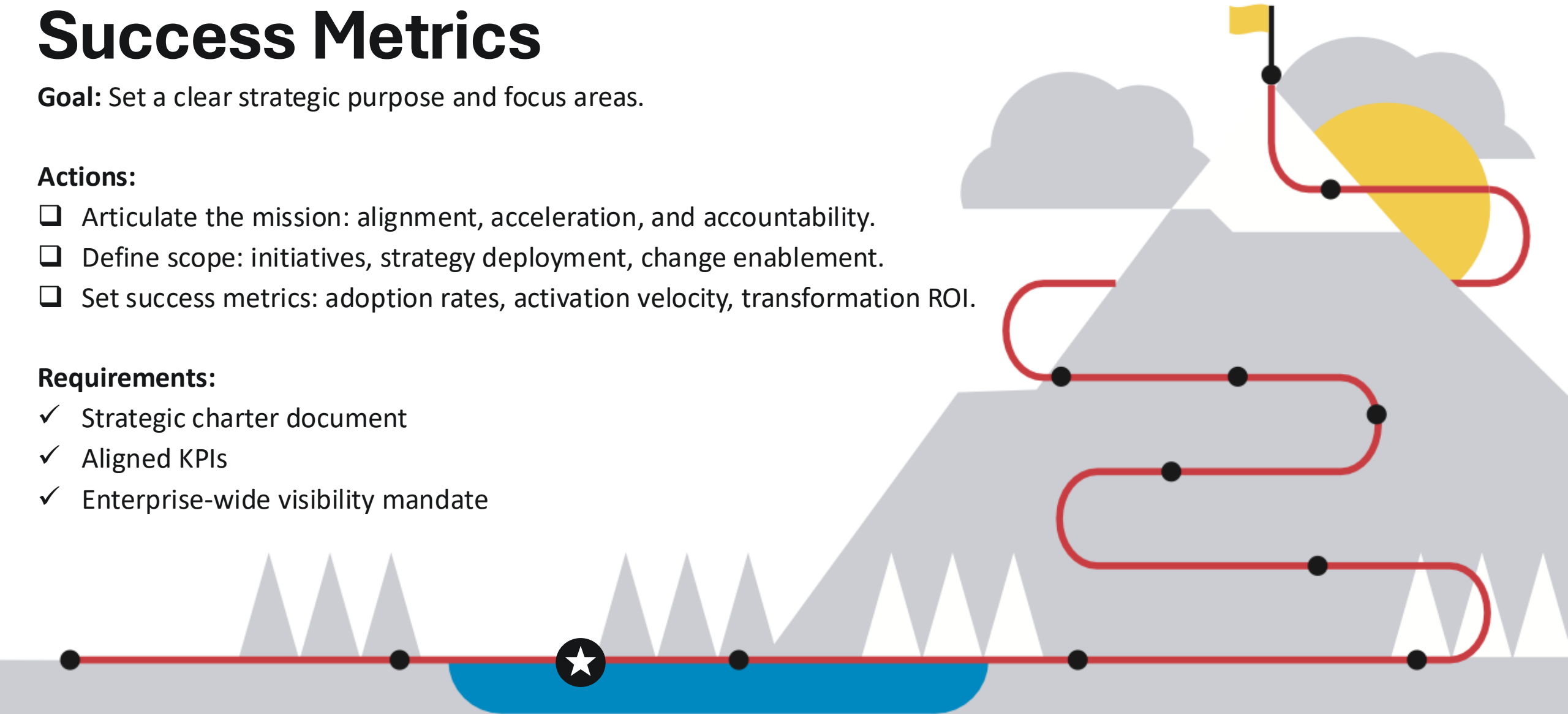
Goal: Set a clear strategic purpose and focus areas.

Actions:

- ☐ Articulate the mission: alignment, acceleration, and accountability.
- ☐ Define scope: initiatives, strategy deployment, change enablement.
- ☐ Set success metrics: adoption rates, activation velocity, transformation ROI.

Requirements:

- ✓ Strategic charter document
- ✓ Aligned KPIs
- ✓ Enterprise-wide visibility mandate



Step 3: Design the Hybrid Governance Model

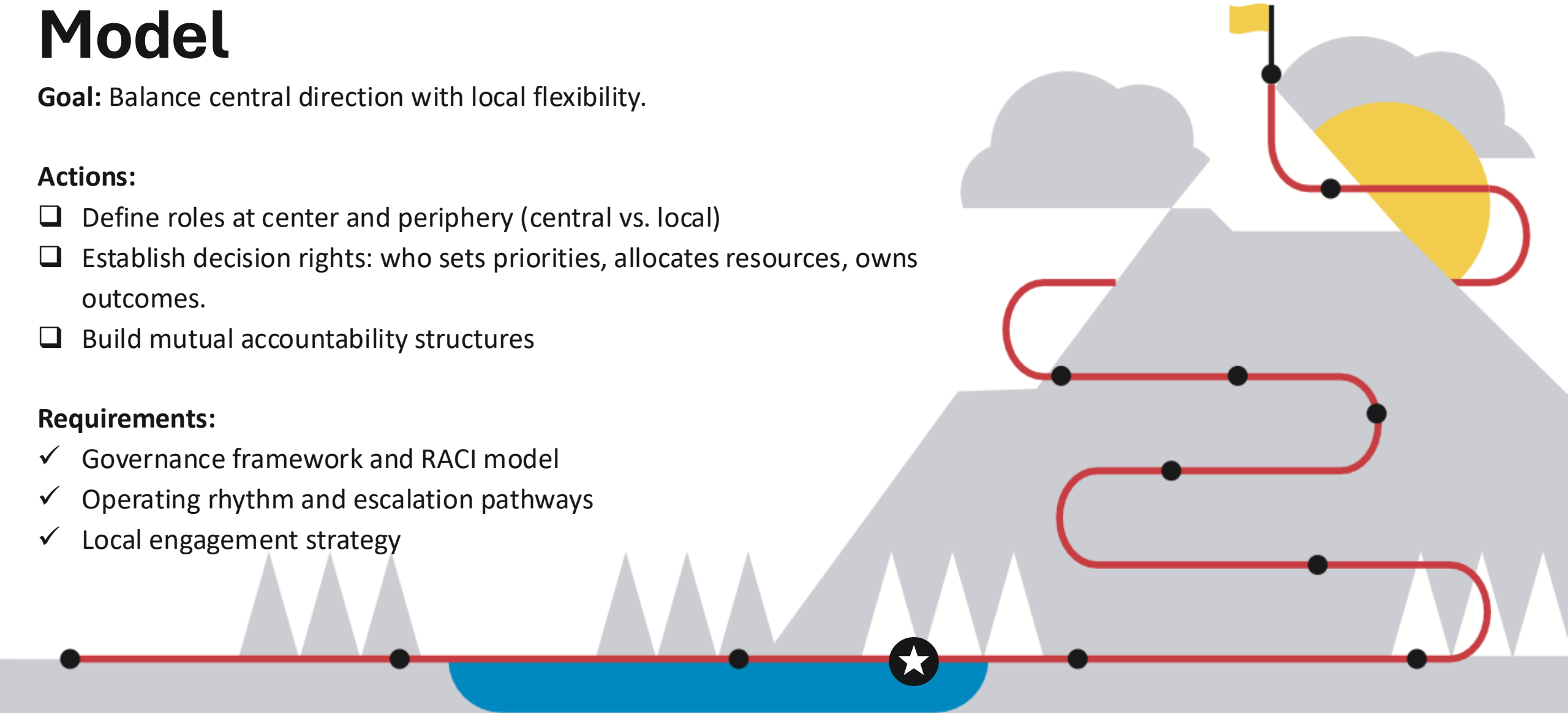
Goal: Balance central direction with local flexibility.

Actions:

- ☐ Define roles at center and periphery (central vs. local)
- ☐ Establish decision rights: who sets priorities, allocates resources, owns outcomes.
- ☐ Build mutual accountability structures

Requirements:

- ✓ Governance framework and RACI model
- ✓ Operating rhythm and escalation pathways
- ✓ Local engagement strategy



Step 4: Stand Up the Core TO Team

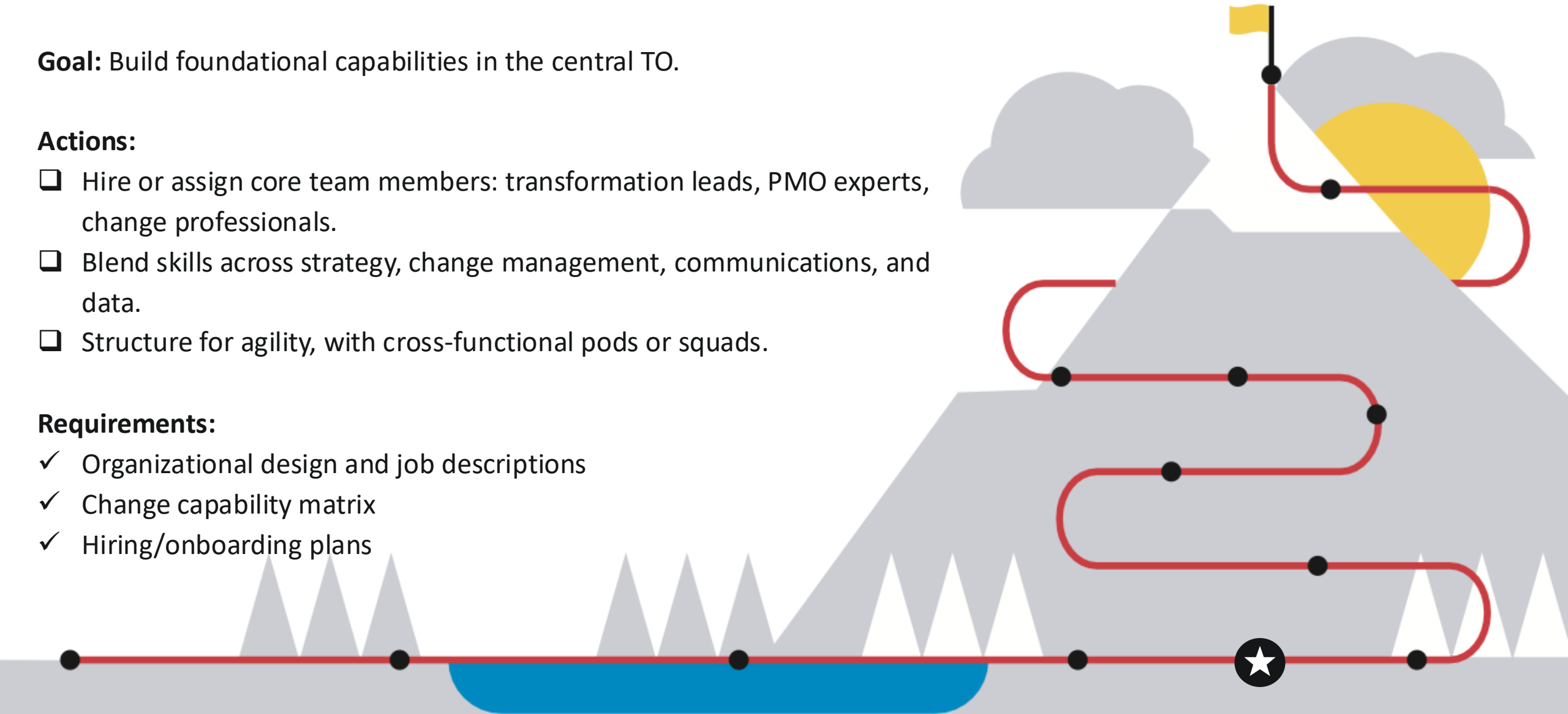
Goal: Build foundational capabilities in the central TO.

Actions:

- ☐ Hire or assign core team members: transformation leads, PMO experts, change professionals.
- ☐ Blend skills across strategy, change management, communications, and data.
- ☐ Structure for agility, with cross-functional pods or squads.

Requirements:

- ✓ Organizational design and job descriptions
- ✓ Change capability matrix
- ✓ Hiring/onboarding plans



Step 5: Develop the Enterprise Change Model and Toolkits

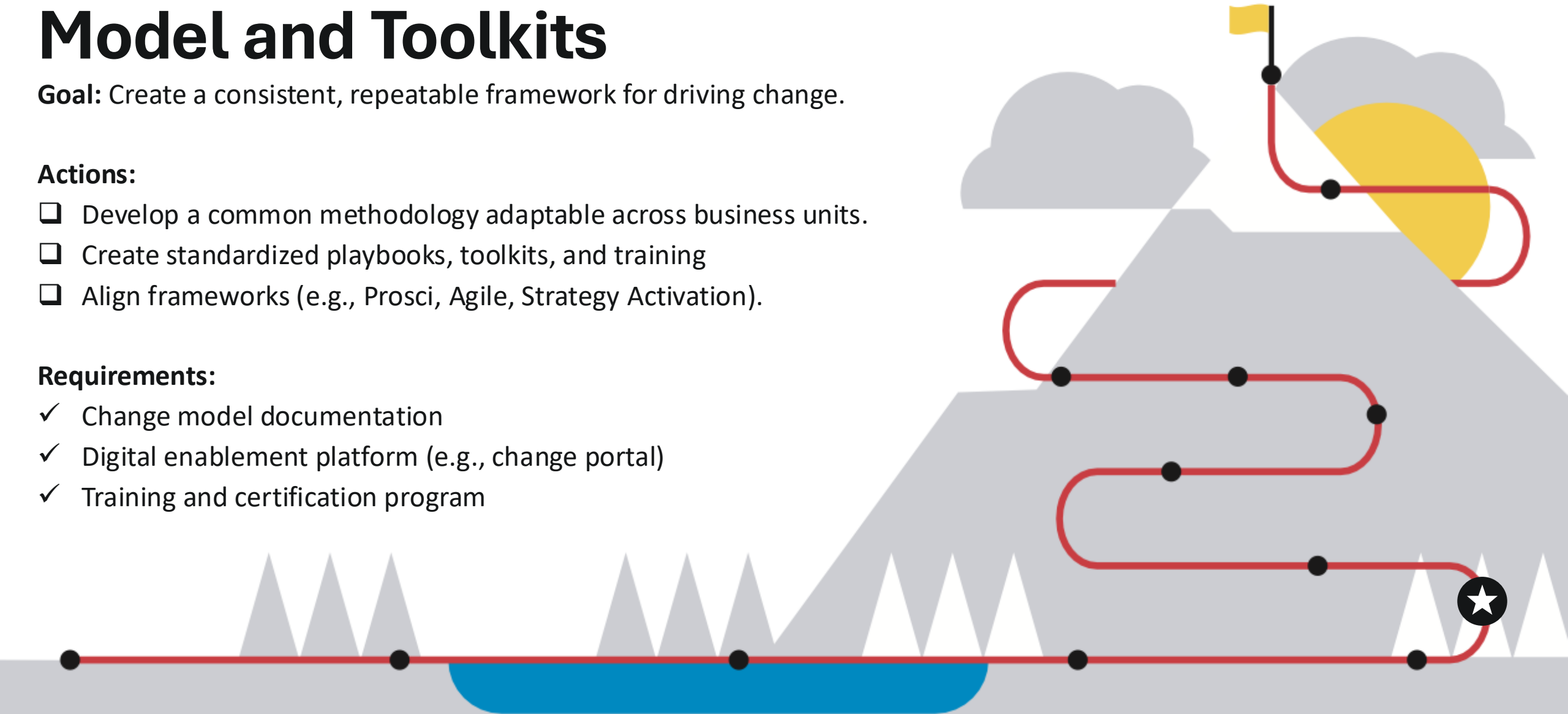
Goal: Create a consistent, repeatable framework for driving change.

Actions:

- ☐ Develop a common methodology adaptable across business units.
- ☐ Create standardized playbooks, toolkits, and training
- ☐ Align frameworks (e.g., Prosci, Agile, Strategy Activation).

Requirements:

- ✓ Change model documentation
- ✓ Digital enablement platform (e.g., change portal)
- ✓ Training and certification program



Step 6: Deploy Enabling Technologies

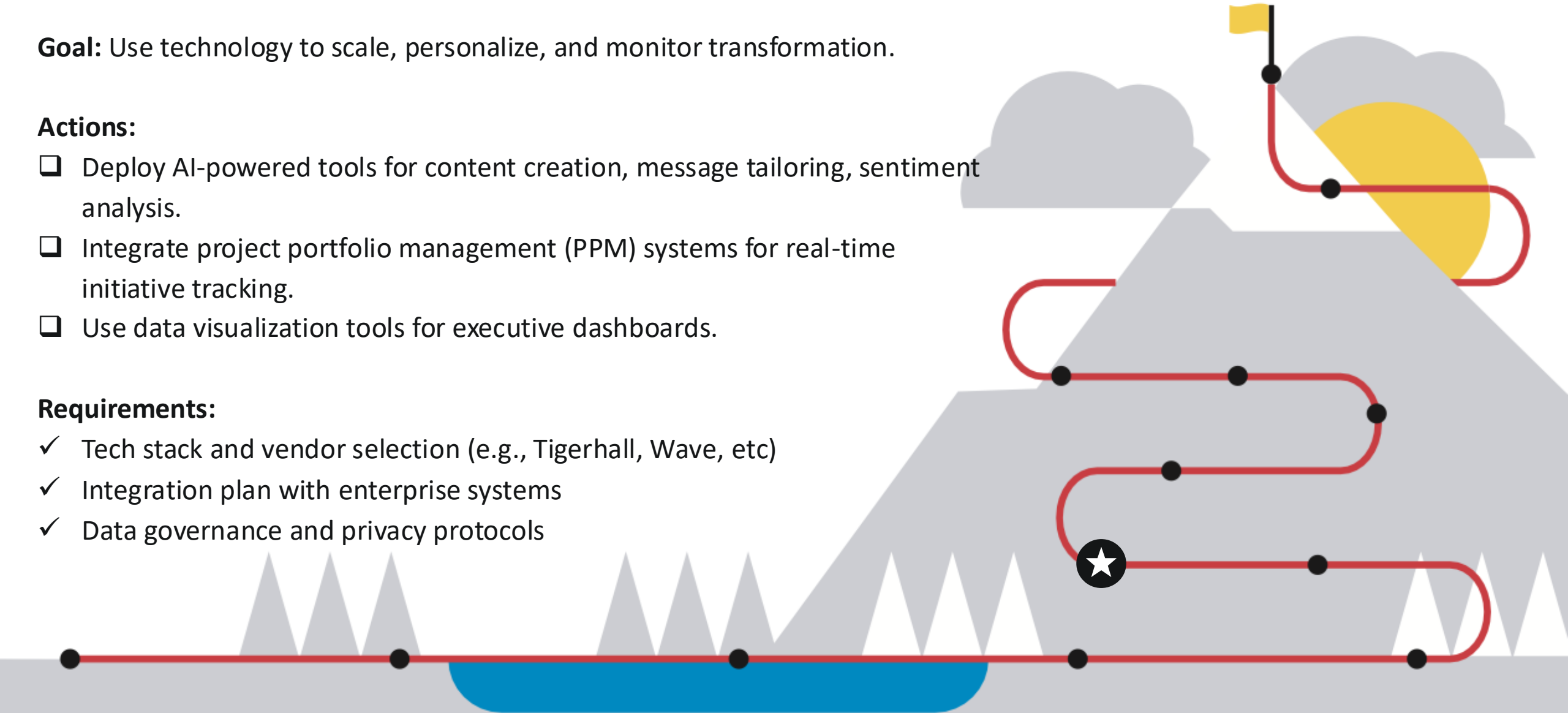
Goal: Use technology to scale, personalize, and monitor transformation.

Actions:

- ☐ Deploy AI-powered tools for content creation, message tailoring, sentiment analysis.
- ☐ Integrate project portfolio management (PPM) systems for real-time initiative tracking.
- ☐ Use data visualization tools for executive dashboards.

Requirements:

- ✓ Tech stack and vendor selection (e.g., Tigerhall, Wave, etc)
- ✓ Integration plan with enterprise systems
- ✓ Data governance and privacy protocols



Step 7: Align Transformation Initiatives with Strategic Priorities

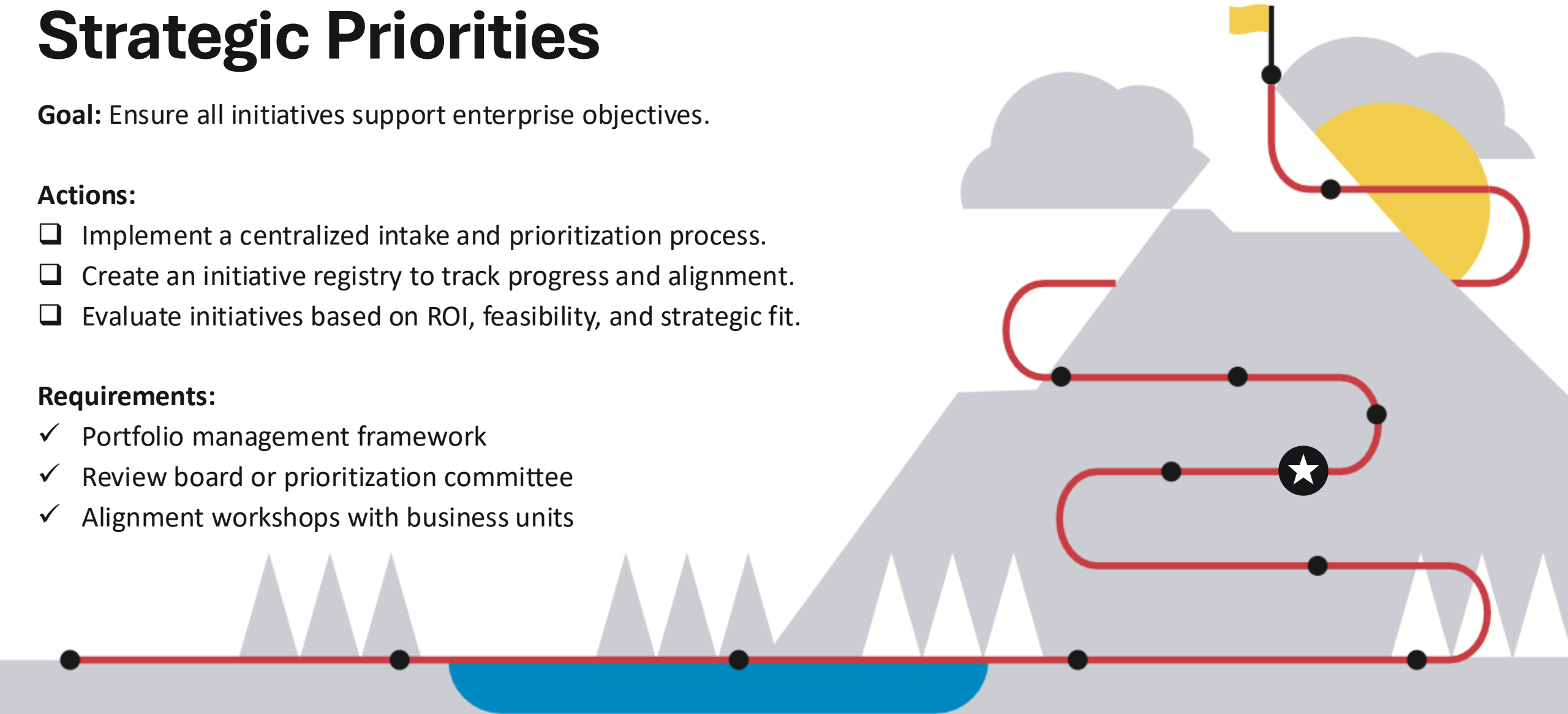
Goal: Ensure all initiatives support enterprise objectives.

Actions:

- ☐ Implement a centralized intake and prioritization process.
- ☐ Create an initiative registry to track progress and alignment.
- ☐ Evaluate initiatives based on ROI, feasibility, and strategic fit.

Requirements:

- ✓ Portfolio management framework
- ✓ Review board or prioritization committee
- ✓ Alignment workshops with business units



Step 8: Build Local Activation Networks

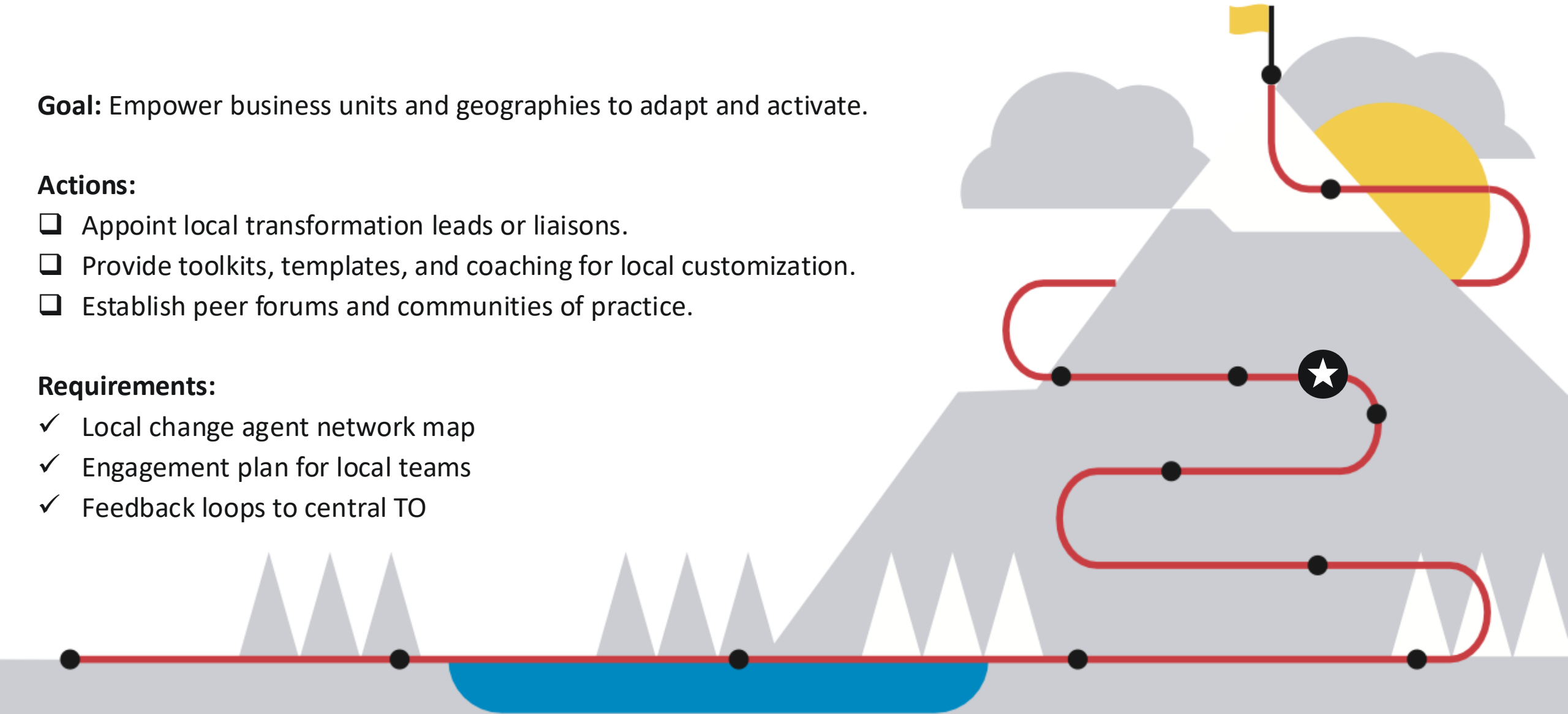
Goal: Empower business units and geographies to adapt and activate.

Actions:

- ☐ Appoint local transformation leads or liaisons.
- ☐ Provide toolkits, templates, and coaching for local customization.
- ☐ Establish peer forums and communities of practice.

Requirements:

- ✓ Local change agent network map
- ✓ Engagement plan for local teams
- ✓ Feedback loops to central TO



Step 9: Launch, Communicate, and Engage Stakeholders

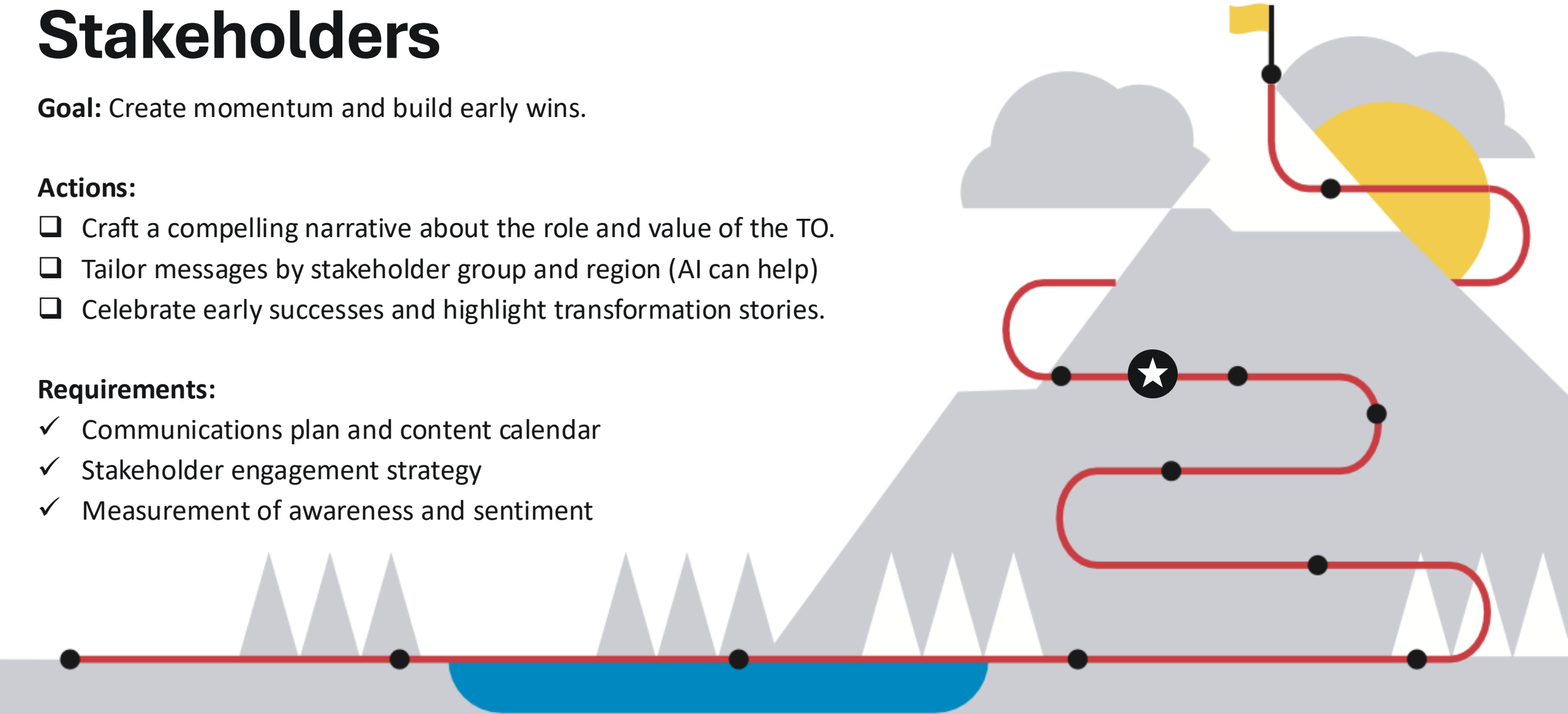
Goal: Create momentum and build early wins.

Actions:

- ☐ Craft a compelling narrative about the role and value of the TO.
- ☐ Tailor messages by stakeholder group and region (AI can help)
- ☐ Celebrate early successes and highlight transformation stories.

Requirements:

- ✓ Communications plan and content calendar
- ✓ Stakeholder engagement strategy
- ✓ Measurement of awareness and sentiment



Big Step: Cultivate a Culture of Change

The effectiveness of a Transformation Office ultimately hinges on the broader organizational culture.

**Change
Capacity**

The volume or bandwidth an organization has to absorb and execute change

=

**Change
Capability**

The institutionalized systems, skills, and structures that enable change

+

**Change
Agility**

The speed and flexibility with which an organization can respond to change.



Step 10: Cultivate a Culture of Change

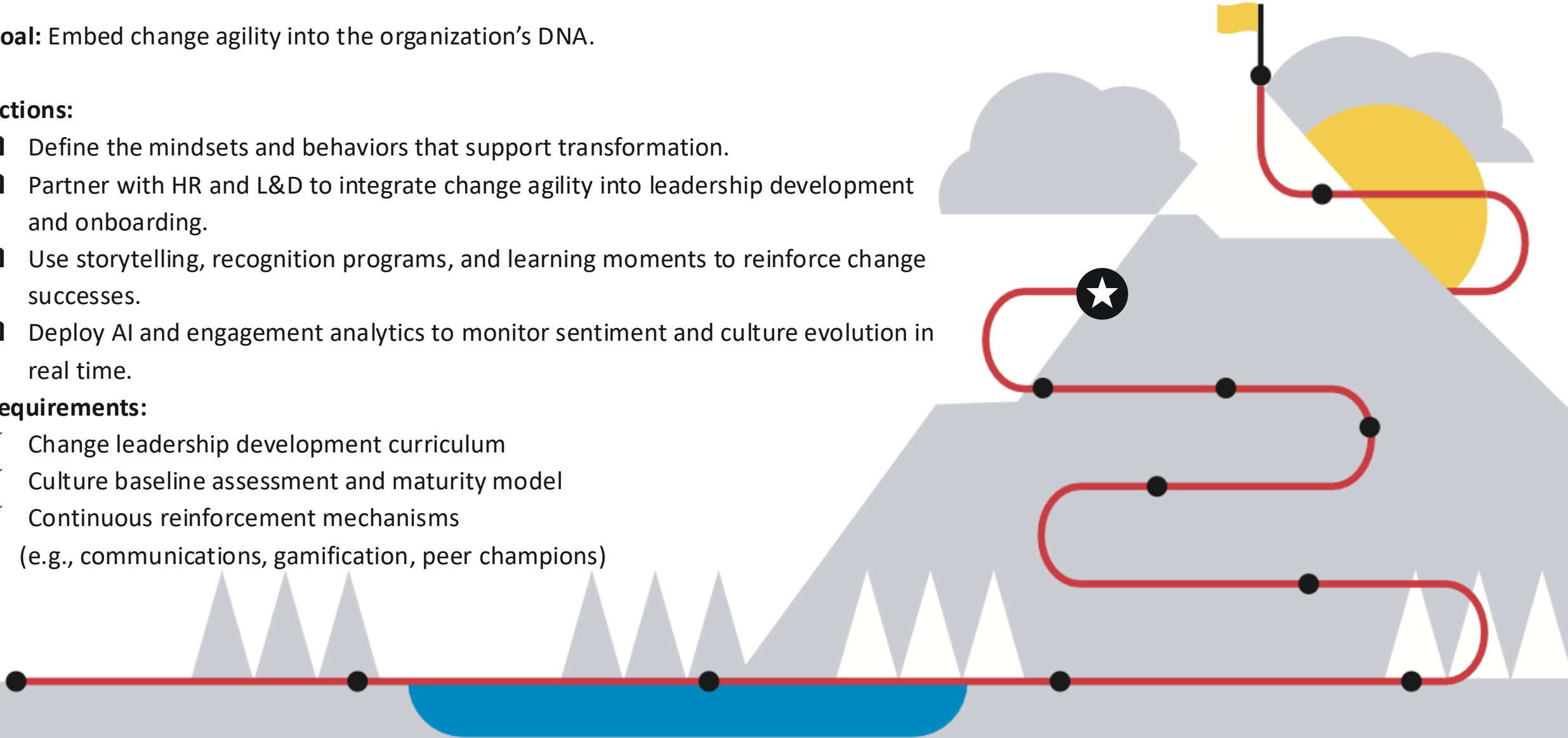
Goal: Embed change agility into the organization's DNA.

Actions:

- ☐ Define the mindsets and behaviors that support transformation.
- ☐ Partner with HR and L&D to integrate change agility into leadership development and onboarding.
- ☐ Use storytelling, recognition programs, and learning moments to reinforce change successes.
- ☐ Deploy AI and engagement analytics to monitor sentiment and culture evolution in real time.

Requirements:

- ✓ Change leadership development curriculum
- ✓ Culture baseline assessment and maturity model
- ✓ Continuous reinforcement mechanisms
(e.g., communications, gamification, peer champions)



Step 11: Continuously Improve and Scale

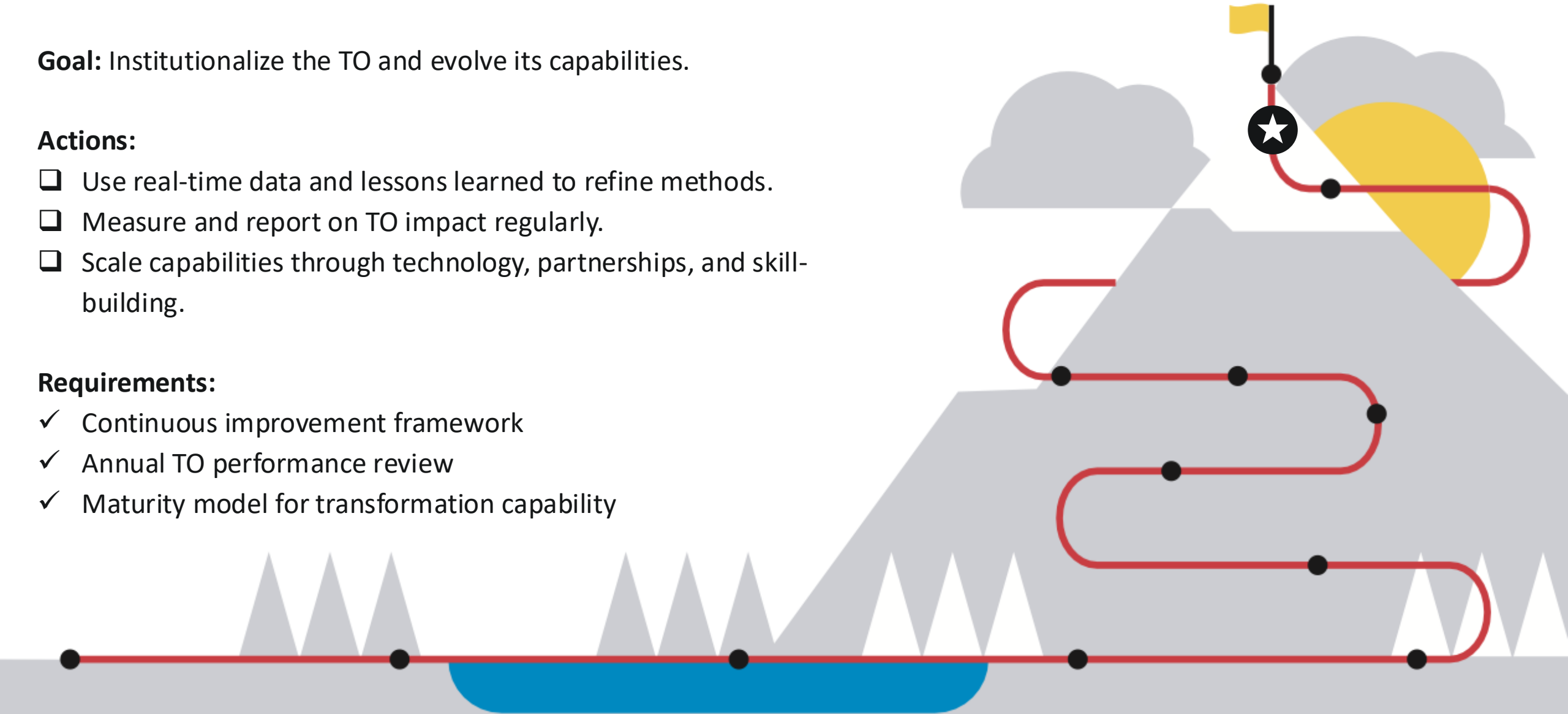
Goal: Institutionalize the TO and evolve its capabilities.

Actions:

- ☐ Use real-time data and lessons learned to refine methods.
- ☐ Measure and report on TO impact regularly.
- ☐ Scale capabilities through technology, partnerships, and skill-building.

Requirements:

- ✓ Continuous improvement framework
- ✓ Annual TO performance review
- ✓ Maturity model for transformation capability



Measuring Success: KCIs and KPIs

Key Change Indicators

Awareness and Understanding

Employee Sentiment Analysis

Leadership Behavior Adoption

Change Fatigue Indicator

Cultural Maturity Index

Participation in Change Activities

Change Readiness Index

Key Performance Indicators

Initiative Activation Velocity

Strategic Initiative Alignment Rate

Initiative Success Rate

Time to Value

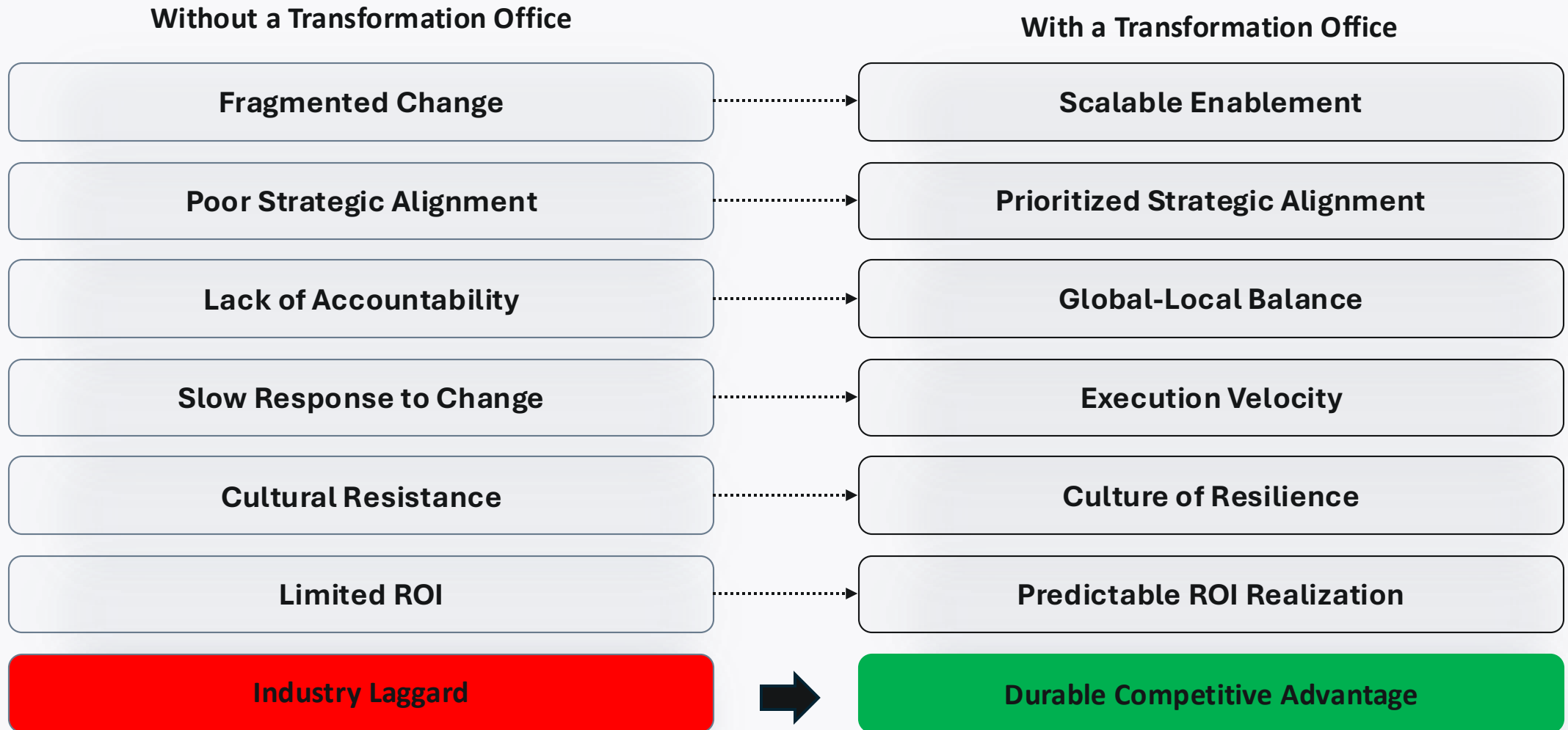
Stakeholder Engagement Effectiveness

Adoption Metrics

Technology Utilization Metrics



Transformation Capability: From Pain to Gain



The Takeaway

There is a methodical approach to both building and refining your transformation capability, and combined with culture activation, your organization's change capacity.

Change capacity is the future's durable competitive advantage.



Closing Thoughts

The most resilient organizations will not only choose the right model—they will continually evolve it.

- *As the speed and scale of transformation increase, so too must the adaptability of the Transformation Office.*
- *There is no "one right way" to structure transformation, but there is a right way for your organization, right now. Choosing wisely may be the most strategic move you make.*

Call to Action:

- *Assess your current transformation capability against these eleven steps, and identify gaps and opportunities.*
- *Start a conversation internally about evolving and future-proofing your Transformation Office, and build the business case for change.*
- *Join the rest of the series!*



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What's Next?

Webinar



[Link in Chat](#)

Demo

See how Tigernall supports
change activation at scale

[Link in Chat](#)

Office Hours

30 Minute Meeting to
discuss your change
challenge or the content of
this series

aric@Tigerhall.com



Discussion





Aric Wood

Chief Strategy Officer

+1 503 804 9087

aric@tigerhall.com

@aric wood

www.tigerhall.com

Thank You!

