

# Executive Strategy Update Template

## 1. Header

- **Domain:**
- **Presenter:**
- **Date:**
- **Audience:** (CIO, CDO, Business Execs, Ops Head)
- **Update Type:** (Quarterly / Mid-Year / Annual / Special)

## 2. Executive Summary




- **Purpose of Update:** Why are we here (inform, decision, funding)?
- **Key Message:** 1–2 lines summarizing where we are and where we’re heading.
- **Ask (if any):** Approval, funding, support, escalation.


## 3. Domain Vision & Strategy

- 2–3 bullets on the **target state vision**.
- Strategic alignment with enterprise priorities (cloud, data, compliance).
- How this supports **business outcomes** (speed, risk reduction, cost savings).

## 4. Progress Snapshot (Quarterly or PI Level)

Use a simple RAG (Red/Amber/Green) table:

Initiative	Status	Key Milestones	Notes
Attribution Engine Modernization	 On Track	Pilot complete	Delivering sleeve attribution in 2026
OBIEE Decommission	 At Risk	Reporting tool delayed	Needs PMO escalation
Lineage Integration	 On Track	Q2 2026 delivery	End-to-end flows working

Alternatives Attribution	 Behind	Still in design	Talent gap identified
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## 5. Risks & Issues (Top 3)

- **Risk 1:** Data quality gaps in sleeve/strategy tagging (Mitigation: data stewardship program).
- **Risk 2:** Talent availability for Python/Cloud (Mitigation: training + vendor support).
- **Risk 3:** OBIEE decommission dependency on Reporting modernization (Mitigation: escalate to CIO).

## 6. Regulatory / Compliance Readiness

- Summary of upcoming regulatory deadlines (SEC, IRS, ESMA).
- Current compliance posture (ready/not ready).
- Audit findings and remediation progress.

## 7. Business Value Delivered

- Efficiency gains (Ops hours saved).
- Risk reduction (audit findings closed).
- Business enablement (faster client reporting, new product support).

## 8. Next Steps / Roadmap (Next 2–3 Quarters)

- Key deliverables by quarter (Q1, Q2, Q3).
- Dependencies requiring executive support.