



Living Memo Template

How to use this template:

- Create your Living Memo as part of your annual planning and quarterly cadence.
- Treat this as a Living Memo. This is something that can continue to be evolved and updated over time.
- Consider the format of how you will capture the information. Consider ease of communication with stakeholders and data capture / aggregation.
- Share links where others can learn additional context! Transparency and aligned understanding is essential.

For more information about how to adapt this template for your context, reach out to Maria Muir (maria@soonersaferhappier.com) or Mark Payne (markpayne@soonersaferhappier.com)

Memo Version	
Value Stream	
Quarterly Cadence Timeline	
Memo Writer	
Memo Contributors	

Connection to Strategy

3 Year Outcomes

Context and overview	
Alignment to Enterprise 3yr	
Market conditions, environment changes	
Outcome (OKR) Roadmap	

1 Year Outcomes

Environmental alignment &/or pivots	
Strategy alignment &/or pivots	
FY Outcome (OKR) Roadmap <ul style="list-style-type: none"> • Inputs: Last year outcomes / learnings • This year's outcomes (sequenced by Quarters) 	
FY Delivery Roadmap <ul style="list-style-type: none"> • Inputs: Last year's delivery / learnings • This year's delivery (sequenced by Quarters) 	
Carry over from previous FY Key Initiatives	
Capacity – How we will deliver (Workforce / Vendors)	
Dependencies on others	
Total Delivery Investment: Change & Run Allocation	

Focus for the Quarter - Delivery

First Quarter Outcomes

Next Quarter Outcomes (OKRs)	
Next Quarter Work	
New to Discovery	
Exit Discovery into Delivery	
Delivery	
Delivery to BAU	
BAU Out of Scope	
Work that will be stopped	
<ul style="list-style-type: none"> • Capacity – What and who do we need to successfully deliver <ul style="list-style-type: none"> ◦ Internal - People and tools ◦ Third parties ◦ Dependencies on others • Capex / Delivery Opex Allocation and Financials (Next Quarter Drawdown) 	