



September 13-14, 2022

Strategic Planning & Financial Alignment to Strategic Outcomes that Matter

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Background | About Us

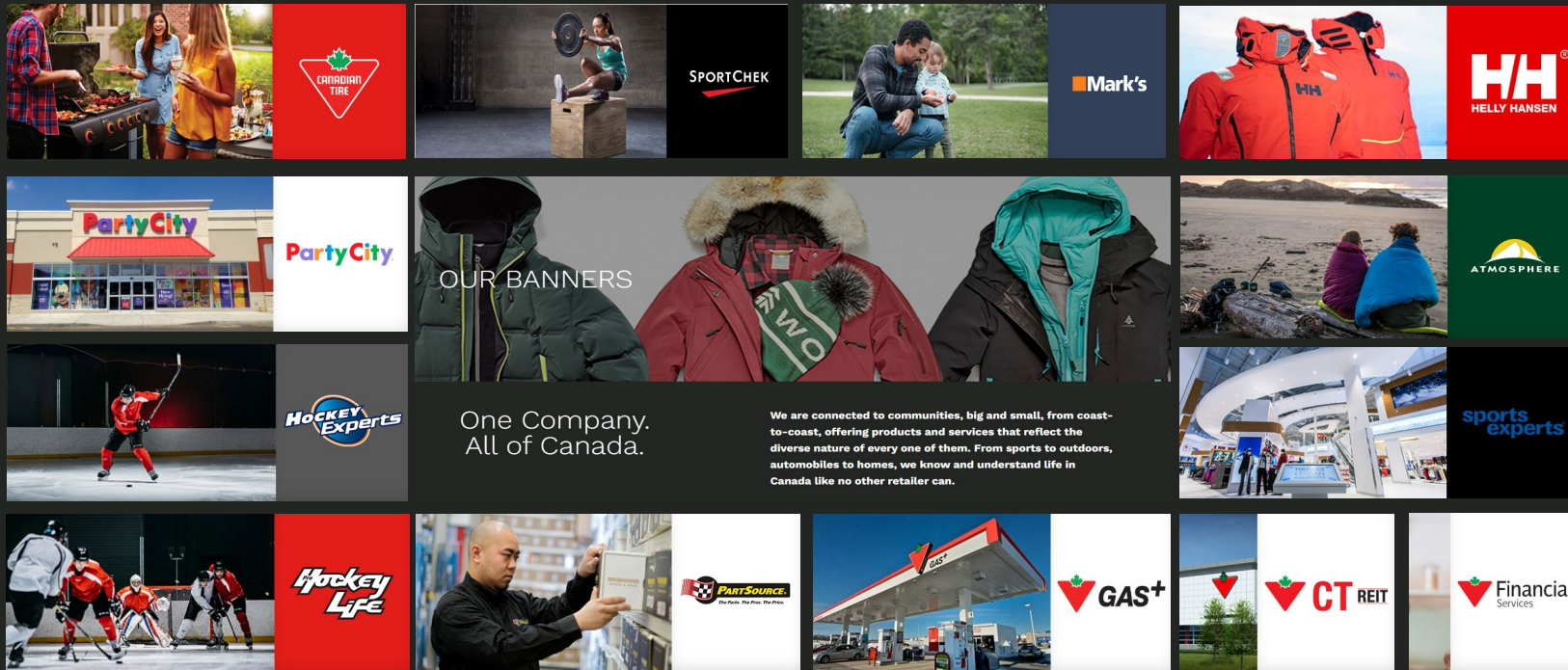
ABOUT US

We Are Here to
Make Life in Canada
Better.

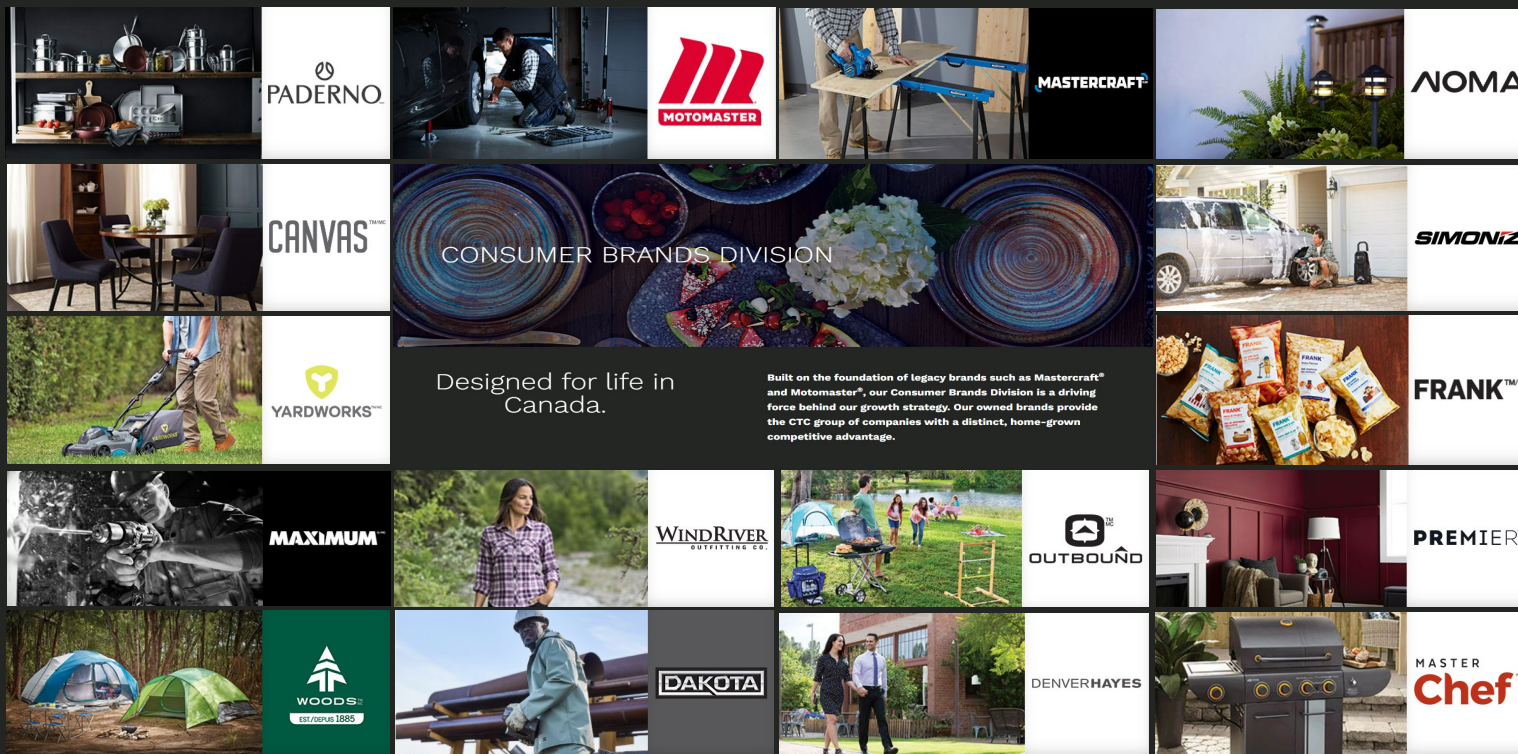
Guided by our founders A.J. and J.W. Billes' innovative and entrepreneurial spirit, we strive always to make things better for our customers. Today, our network of 1,700 retail locations couldn't be stronger and our staff, more connected to the communities they serve. The retail landscape is changing, and so are we – all to serve you better than ever before.



Background | Our Banners



Background | Our Brands

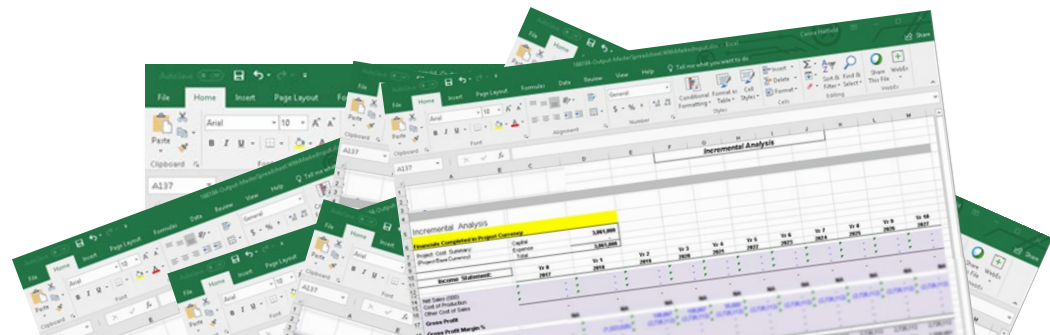


Problem | Keeping Up with Speed of Change

Impacts To The Annual Plan

- × Market and Competition
- × Adjusted Targets
- × Pivoting Priorities
- × Conflicting Priorities
- × Intake of New Demand
- × Technology Advances
- × Capacity Changes
- × Schedules Shifting

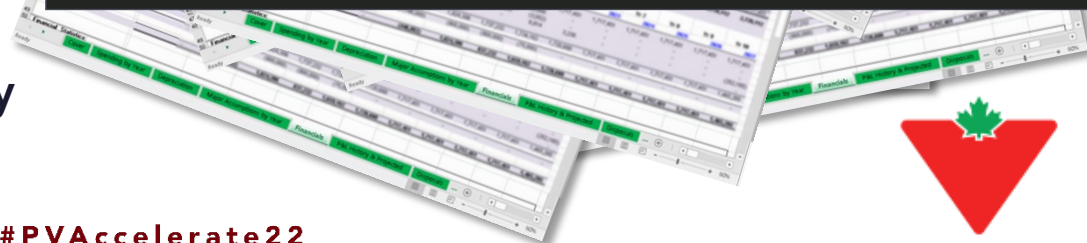
Disconnected Strategy to Delivery



DISRUPTION

“Processes that were just inefficient last month don’t work at all today.”

Forrester, [COVID-19 Remote Work Just Broke Your Processes: Here's What To Do About It](#)



Solution | Enterprise Investment Planning

Enable Enterprise Investment Planning (EIP) in alignment with Strategic Outcomes



- A single unified **Enterprise Investment Planning process** across all investment types
- A single **System of Record** for multi-year investment plans over the Outlook Horizon & beyond
- A **Strategic Hierarchy** which clearly articulates the Enterprise Strategies and Target Outcomes
- Transition of all inflight and planned investments to **Outcome-centric Investment Ownership**
- **Measurement of the Planned Contribution** of each investment to the target Outcome



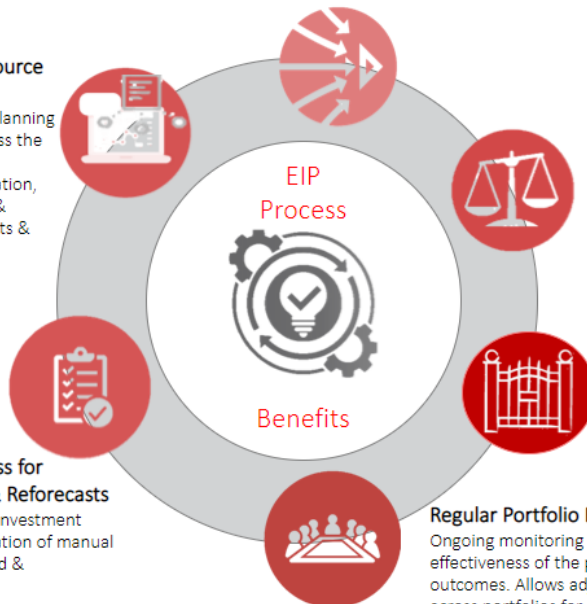
Focus | Objectives & Key Enablers

Align investments to strategic business outcomes

Strategic Investment Portfolios will align investment spend with CTC strategic priorities to provide a consistent process for identifying, prioritizing, approving & tracking initiatives

Planview – Single Source of Truth

Common investment planning & tracking system across the Enterprise will enable identification, prioritization, approval and tracking & reporting of investments & investment portfolios



New Enterprise CBA

The use of a standard enterprise CBA provides a consistent approach to the evaluation of investment opportunities across the organization based on financial metrics, risk profile & alignment to strategic priorities

Standardize Governance & Funding Staged Gates

Consistent governance across all investment types, ensures prioritization based on contribution to the portfolio's strategic objective & facilitates spend approvals independent of spend type

Regular Portfolio Review Meetings

Ongoing monitoring & reporting to assess progress & effectiveness of the portfolio in delivery of the target outcomes. Allows adjustments as required within and across portfolios for more effective decision making

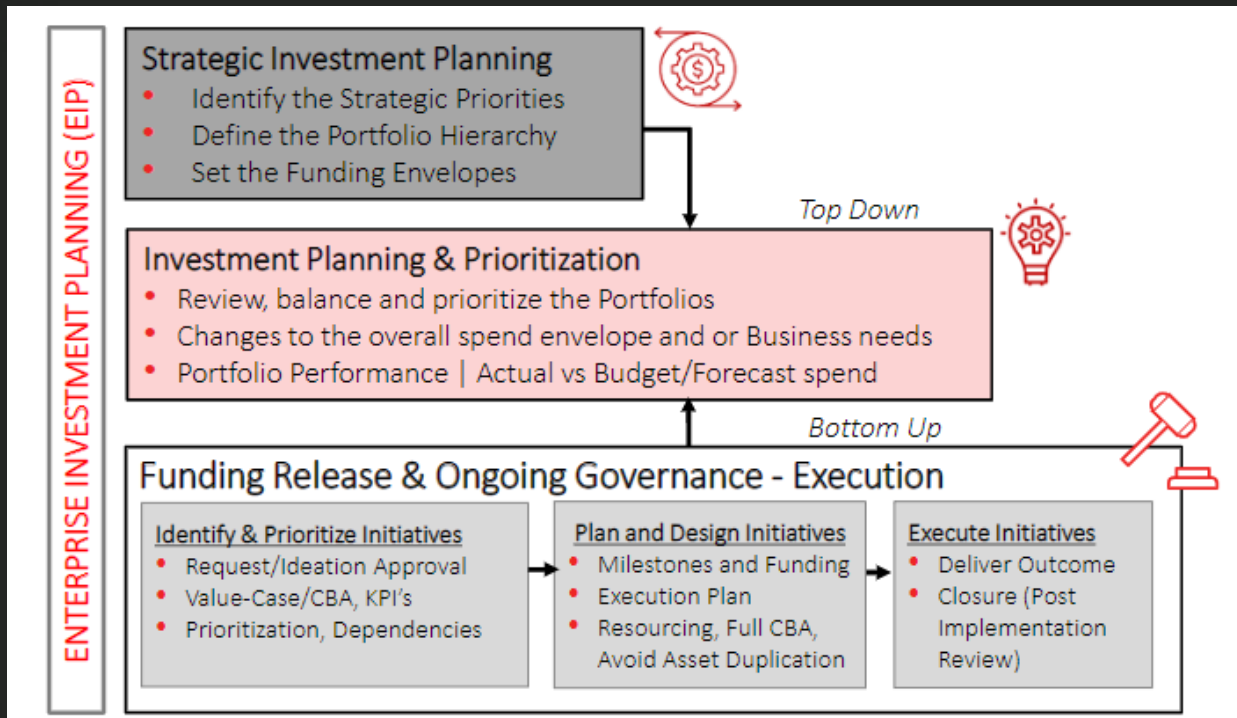
Standardized Process for Capturing Actuals & Reforecasts

Centralized source for investment reforecasting & elimination of manual tracking of actual spend & reforecasting



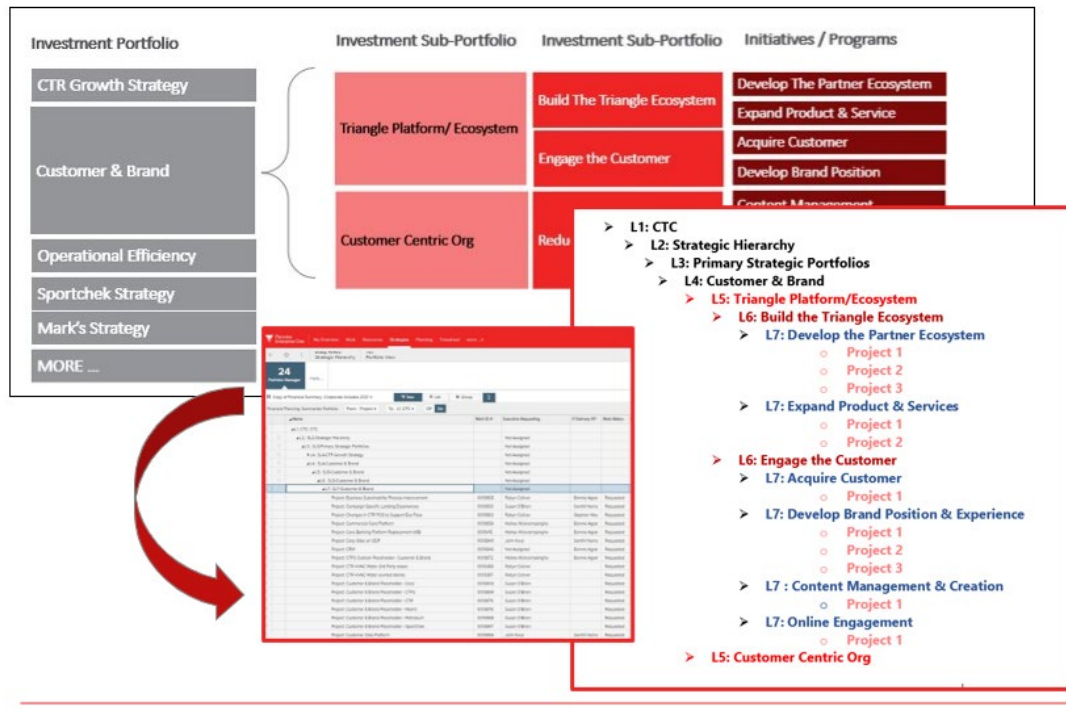
Journey | Establish the Process

Establish Executive
Alignment on EIP Process
Design



Journey | Establish the Structure

Design the Strategic Hierarchy



Journey | Establish the System of Record

2021-2026 INVESTMENT PLAN IN PLANVIEW

Create the Single
Source of Truth



862 New Projects

x25 attributes each added to Planview, making it 21, 500 attributes updated as part of the Work Breakdown Structure



205 OE Projects

x25 attributes updated and linked to the new Strategic Hierarchy



100 In-Flight Projects

X25 attributes updated and validated and linked to the new Strategic Hierarchy



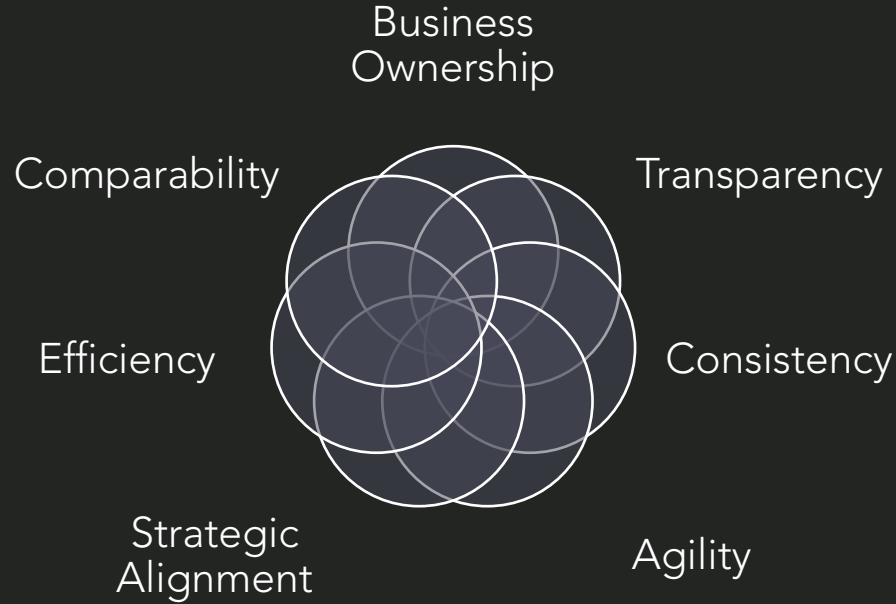
Financials 2021-2026

All financials from 2021-2026 uploaded in PV to match December Board Submission

All projects from the 2021 Investment Portfolio Master have been setup in Planview
The financial values for the December Board submission for the 5 year Outlook have been uploaded



Benefits | What We Have Gained



Next | Where Do We Go From Here?



- Enterprise Dashboarding & Reporting
- Investment Returns & Benefits Tracking
- Big Room Planning & Prioritization
- OKR's and Road-mapping
- LeanKit integrated to Jira for Agile Program Management



Next | Where Do YOU Go From Here?

Make it Happen!

Develop your roadmap leveraging Planview's Enterprise One capabilities, extensive communication, change management, and train, train, train!



- Evaluate Your **Current State**
 - Would your organization benefit from a single system of record which clearly maps your investments to your strategic outcomes?
- Define Your **Target End State**
 - Establish executive alignment with your EIP vision.
 - Create a strategic hierarchy comprised of portfolios with clearly defined executive ownership and accountability.
- Design & Enable **Enterprise Governance Processes**
 - Create processes & workflows which will establish and maintain the mapping and alignment of all investments to strategic portfolios.



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ACCELERATE™
COLLABORATE. INSPIRE. GROW.

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Thank you!

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