



TO-BE FUTURE STATE ASSESSMENT

Future State Design & Vision

A disciplined framework for defining where you are going — and how you will get there.

CLIENT	ASSESSMENT DATE	PREPARED BY
[Company Name]	[Date]	[Your Name / Firm]

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How to Use This Template

This template guides your leadership team through designing a clear, realistic vision of your future state across operations, technology, customer experience, and culture. The output becomes the destination your Strategic Roadmap is built to reach.

- Complete this template in facilitated sessions with your leadership team — not individually
- Replace all bracketed placeholders [like this] with your specific information
- Be specific and realistic — anchor every future state to what is actually achievable
- Use your AS-IS Analysis findings as the baseline for every gap you identify
- The output of this template feeds directly into your Business Value Assessment and Strategic Roadmap
- Delete this instruction section before sharing with stakeholders



TO-BE FUTURE STATE ASSESSMENT

Executive Summary

Capture the transformation vision and key outcomes at a glance. This section should be completable in a single leadership session and should be revisited after all other sections are complete.

VISION STATEMENT

[Enter response here]

One powerful sentence describing the future state the organization is working toward. It should be aspirational but grounded — something every employee can understand and leaders can commit to.

FUTURE STATE SNAPSHOT

ELEMENT	DETAILS
Primary Strategic Driver	<i>[Growth / Efficiency / Customer Experience / Digital Transformation / Other]</i>
Scope	<i>[Business units, functions, geographies, or systems in scope]</i>
Transformation Horizon	<i>[Near-term: 12 months / Mid-term: 1–2 years / Long-term: 3+ years]</i>
Key Outcome Areas	<i>[List 3–4 high-level outcome themes that define success]</i>
Engagement / Project Title	<i>[Name of this transformation initiative]</i>
Version	<i>[1.0]</i>



SECTION 1 · Future State Design — Operations

Define how the business will operate in the future state. Focus on what will be meaningfully different — not incremental improvements, but a clear picture of how work gets done.

TARGET OPERATING MODEL

[Enter response here]

Describe how work will be organized, managed, and delivered in the future state. Address structure, decision-making, process ownership, and key workflows.

KEY PROCESS IMPROVEMENTS

[Process improvement 1]

[Process improvement 2]

[Process improvement 3]

[Process improvement 4]

OPERATIONAL GAPS TO CLOSE

[Gap 1 — from AS-IS to TO-BE]

[Gap 2]

[Gap 3]

[Gap 4]

SUCCESS LOOKS LIKE

[Enter response here]

Describe what operational success looks like in the future state — be specific and measurable. What will be visibly different for employees, managers, and customers?



SECTION 2 · Future State Design — Technology

Define the target technology landscape — systems, platforms, integrations, and infrastructure. Ground every technology decision in a specific business capability it enables.

TARGET TECHNOLOGY ARCHITECTURE

[Enter response here]

Describe the target technology landscape — systems, platforms, integrations, and infrastructure. What is retained, replaced, upgraded, or newly introduced?

SYSTEMS TO IMPLEMENT / UPGRADE	TECHNOLOGY GAPS TO CLOSE
<i>[System 1]</i>	<i>[Gap 1 — legacy system, integration, capability]</i>
<i>[System 2]</i>	<i>[Gap 2]</i>
<i>[System 3]</i>	<i>[Gap 3]</i>
<i>[System 4]</i>	<i>[Gap 4]</i>

AI ENABLEMENT OPPORTUNITIES

[Enter response here]

Where does AI create real, defensible value in the future state technology landscape? Reference your AI Enablement Assessment for detailed use case analysis.



SECTION 3 · Future State Design — Customer Experience

Define how customers will experience the business in the future state. Be specific about what will be different — what customers will feel, see, and receive that they cannot today.

TARGET CUSTOMER EXPERIENCE

[Enter response here]

Describe the ideal customer experience in the future state — what will customers feel, see, and receive? Map this to specific touchpoints and journeys where possible.

KEY CX IMPROVEMENTS

[CX improvement 1]

[CX improvement 2]

[CX improvement 3]

[CX improvement 4]

CX GAPS TO CLOSE

[Gap 1 — current vs. future experience]

[Gap 2]

[Gap 3]

[Gap 4]

CUSTOMER SUCCESS METRICS

[Enter response here]

What metrics will confirm the customer experience has improved? NPS, retention rate, satisfaction scores, first-contact resolution, time-to-value, etc.



SECTION 4 · Future State Design — Organization & Culture

Define the people, structure, and culture required in the future state. Organizational design is often the most underestimated — and most critical — dimension of transformation.

TARGET ORGANIZATIONAL STRUCTURE

[Enter response here]

Describe the future organizational structure — roles, reporting relationships, team design, and governance. Note what changes from the current state and why.

SKILLS & CAPABILITIES NEEDED

[Capability 1]

[Capability 2]

[Capability 3]

[Capability 4]

CULTURE & CHANGE REQUIREMENTS

[Culture shift 1 — what must change and why]

[Culture shift 2]

[Culture shift 3]

[Culture shift 4]

ORGANIZATIONAL SUCCESS LOOKS LIKE

[Enter response here]

What does organizational health and capability look like in the future state? Describe what leadership, teams, and individuals will be doing differently.



TO-BE FUTURE STATE ASSESSMENT

Gap Analysis Summary

Consolidate the gaps identified across all four dimensions. These gaps become the candidate initiatives for your Business Value Assessment and Strategic Roadmap.

Tip: Complete the four Future State Design sections first, then return here to synthesize. Use your AS-IS Analysis findings as the baseline for each current state description.

DIMENSION	AS-IS (Current State)	TO-BE (Future State)	KEY GAPS	PRIORITY
Operations	<i>[Describe current state]</i>	<i>[Describe future state]</i>	<i>[Key gaps to close]</i>	<i>[H/M/L]</i>
Technology	<i>[Describe current state]</i>	<i>[Describe future state]</i>	<i>[Key gaps to close]</i>	<i>[H/M/L]</i>
Customer Experience	<i>[Describe current state]</i>	<i>[Describe future state]</i>	<i>[Key gaps to close]</i>	<i>[H/M/L]</i>
Organization & Culture	<i>[Describe current state]</i>	<i>[Describe future state]</i>	<i>[Key gaps to close]</i>	<i>[H/M/L]</i>

These gaps are your roadmap inputs. High priority gaps with high business impact become the first initiatives in your Business Value Assessment.



Strategic Objectives & Success Metrics

Define the strategic objectives that this transformation must achieve, and the metrics that will confirm you have arrived. These become the outcomes your Strategic Roadmap is built to deliver.

KEY STRATEGIC OBJECTIVES

Objective 01	[Strategic Objective 1] [Describe the outcome this objective delivers and how it connects to the future state vision]
Objective 02	[Strategic Objective 2] [Describe the outcome this objective delivers and how it connects to the future state vision]
Objective 03	[Strategic Objective 3] [Describe the outcome this objective delivers and how it connects to the future state vision]
Objective 04	[Strategic Objective 4] [Describe the outcome this objective delivers and how it connects to the future state vision]

OVERALL, SUCCESS METRICS

METRIC / KPI	BASELINE	TARGET	TIMEFRAME	OWNER
[KPI 1]	[Current]	[Goal]	[Date]	[Name]
[KPI 2]	[Current]	[Goal]	[Date]	[Name]
[KPI 3]	[Current]	[Goal]	[Date]	[Name]
[KPI 4]	[Current]	[Goal]	[Date]	[Name]
[KPI 5]	[Current]	[Goal]	[Date]	[Name]



Next Steps & Roadmap Connection

This TO-BE Assessment feeds directly into your Strategic Roadmap. The gaps identified across Operations, Technology, Customer Experience, and Organization become the initiatives on your roadmap. The strategic objectives become the outcomes your roadmap is built to achieve.

01

Validate TO-BE Design

Review this document with your full leadership team and confirm alignment on the future state vision before proceeding to prioritization.

02

Prioritize Gaps

Run the Business Value Assessment to score and prioritize the gaps and initiatives identified in this template across all four dimensions.

03

Build the Strategic Roadmap

Connect BVA priorities and TO-BE vision into a workstream-by-horizon Strategic Roadmap with clear sequencing and ownership.

04

Develop Business Cases

Build investment-grade business cases for priority initiatives before committing resources. Use the HQ Partners Business Case Template.

You cannot design a better future without an honest view of the present.

This TO-BE Assessment is the bridge between where you are and where you want to be.

Every initiative, every roadmap decision, every resource commitment starts here.

HQ Partners · The Touchstone Discovery Method · Trust | Confidence | Capable

The right questions change everything.

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