



**STRATEGIC
INITIATIVE
INVENTORY TOOL
2026**

For a productive
working session with
your leadership team.

2026

Practical Diagnostic Worksheet

for Project Portfolio Clarity



This worksheet helps HR and leadership teams assess active initiative volume, identify capacity collisions, and determine where sequencing or subtraction may be necessary.



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Worksheet

Use this tool in a live working session with executive or functional leaders.

Part 1: Initiative Inventory Snapshot



Begin by reviewing all your enterprise-level initiatives that are active.

- Include transformation projects, compliance initiatives, cultural programs, system upgrades, and major launches.
- Exclude routine business as usual work unless it significantly expands workload.



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Part 2: Load and Collision Review

01 Portfolio Volume

- How many active initiatives are currently in motion?
- How many are labeled “high priority”?
- Are more than three initiatives ranked as top enterprise priorities?

02 Team Collision Scan

- Which teams appear in 3+ initiatives?
- Which leaders sponsor multiple concurrent initiatives?
- Where are the same subject matter experts repeatedly required?

03 Timing & Stacking

- Are multiple initiatives launching within the same 30-60 day period?
- Are high-intensity initiatives stacked without sequencing?
- Have deadlines been compressed to “maintain urgency”?



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Part 3: The Subtraction Filter

For each high-intensity initiative, ask the following questions:

1. If we paused this for 60-90 days, what would break?
2. Does this directly advance a top three enterprise priority or strategic pillar?
3. Are we measuring outcomes or activity?
4. Is this initiative solving a structural problem or reacting to pressure?



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Part 4: Executive Reflection

Use the following prompts to guide your executive discussion.

1. Are we asking the organization to carry more work than capacity allows?
2. Where is initiative volume creating invisible friction?
3. What are we willing to stop in order to protect execution quality?
4. If everything feels urgent, what is actually essential?



Categorize each initiative:

-  Proceed as Planned
-  Sequence Later
-  Pause Temporarily
-  Sunset



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