Potential Timeline for Strategic Planning in 2016

March 8th All Manager Meeting
- Review Timeline for the SP process

March 22 All Manager Meeting
- Review and Analysis of SP Documents

April 12th All Manager Meeting
- Core Value Assessment facilitated by Brett Remington
- 9am-11am – 2 full hours needed

May 12th
- PESTLE facilitated by Brett Remington
- Identification of Strategic Objectives, Goals, Action Plans, targets and measures
- 9am-12pm – 3 full hours needed

June 14th
- Review Strategic Objectives and Goals
- Staff development of SMART Goals
- Group 1 – 9am-11am - 2 full hours needed
- Group 2 - 1pm-3pm - 2 full hours needed

July TBD
- Comparative data sources
- Data collection and management

Baldrige Core Value Assessment

The eleven Baldrige Core Values describe the beliefs and behaviors found in all high performing organizations. Assessing yourself against the Core Values provides strong leading indicators of where process strengths and opportunities for improvement exist within the organization. All of the Baldrige Core Values are reflected in the seven criteria items (Leadership, Planning, Customers, Information, Workforce, Processes and Results). The core values are also embedded in your <u>approach</u> to work, the way that approach is <u>deployed</u>, the <u>learning</u> that takes place through doing the work, and the way in which these systems are <u>integrated</u> to achieve higher, more sustainable <u>outcomes</u> valued by all stakeholders.

Using **customer focused excellence** as an example, the following table illustrates how one core value reaches every area in your business.

Core Value	Criteria Category	Illustrations of Key Questions to Answer, Assess, and Act Upon
Customer Focused Excellence	Leadership	How are leaders communicating with key customers? How are they helping to motivate the workforce to meet or exceed customer expectations?
	Strategy	How are (internal/external) customer performance expectations reflected in the selection/creation of strategic objectives? What are the workforce plans to improve customer satisfaction and engagement?
	Customers	How do you listen to, interact with, and observe customers to obtain actionable information? How do you enable customers to interact with you? How do you manage complaints?
	Measurement, Analysis and Knowledge Management	How do you use voice of the customer data within the organization? How are you measuring workforce performance in order to ensure efficient and effective customer relationships? How are you sharing best practice information between work units/areas?
	Workforce	How do we know our workforce has the capability and capacity to meet customer expectations? What are the customer-related factors that contribute to workforce satisfaction and engagement? How is the workforce learning and sharing information about customers that would improve overall organizational performance?
	Operations	How are the work processes designed to meet expected customer outcomes efficiently and effectively? How are our work processes minimizing costs, defects, errors and rework in our customer interactions?
	Results	What data do we have to substantiate our performance in satisfying customers and achieving satisfactory engagement? How does our performance compare to other similar agencies?

Regardless of whether you feel you are a role model for a core value, have some obstacles that you must address and overcome, or uncover a difference in perspective among your leadership about your current maturity levels, the Core Value Assessment delivers powerful new insight to the factors that distinguish your organization in a competitive marketplace.

PESTLE Analysis: *Establishing actionable, comprehensive*
context for organizational planning

What is PESTLE Analysis?

PESTLE is an analytical tool used in strategic planning. It provides a strategic framework for understanding and addressing <u>external</u> influences on an organization. PESTLE is an acronym for Political, Economic, Societal, Technological, Legal, and Environmental trends and events. The framework prompts leaders to continually examine the external business environment, consider what may be changing, emerging or receding, and determine whether those changes represent opportunities, threats, or uncertainties. PESTLE analysis considers the past, present and future, whereas traditional SWOT analysis tend to focus only on one moment in time. Because PESTLE analysis is more expansive in both time and factor context, it tends to do a better job of mitigating blind spots. PESTLE analysis is based on agility, which for many organizations yields a more effective and efficient approach to strategic planning.

How does PESTLE Analysis work?

- Relevant teams (often cross-functional or leadership teams) look at each of the PESTLE elements one by one
- Evaluate what is new or changed – new entrants to the scene, known actors leaving or changing roles, new or changing trends, new data emerging, etc.
- Determine what has not changed, contrary to expectations
- Draft key of items of interest, add relevant knowledge, validate that knowledge, and perform a preliminary assessment of component factors (see accompanying template).
- Look for constructive or destructive interference. Interference occurs when trends or events interact to reinforce or counteract each other's impact. An organization gains a competitive advantage when it acts on potential interference, anticipating the effect of a future interaction before competitors have an opportunity either to influence inputs, or prepare for a potential outcome.
- Prioritize PESTLE factors based on common criteria
- Develop plans at the Strategic or Operational level to address these factors
- Review the PESTLE Analysis on a semi-annual basis and update/act accordingly

PESTLE Analysis Template:

Rank	Type (PESTLE)	Description	Reference/Source	Importance	Risk	Likelihood	Ability to Control	Timescale
Rank order the factor from 1 to n in order of nominal group priority	P = Political E = Economic S = Social T = Technological L = Legal E = Environmental	Describe the observation/issue in plain language	Provide a reference, benchmark, weblink, or other fact-based source to substantiate the observation	High, medium, or low in terms of organizational impact	Categorize the risk as high, medium, or low	Categorize the likelihood of the event happening given the risk as high, medium or low	Categorize the ability to control the factor as: "Affect/control = high", "Influence = medium" or "respond/react = low"	Describe the time horizon that the factor will be present and/or at its greatest
				High	High	High	Low	<= 1 year
				Medium	Medium	Medium	Medium	1-5 years
				Low	Low	Low	High	Far future

The organization may also choose to do PESTLE analysis storyboarding, showing cause and effect linkages between factors as a means to substantiate their planning recommendations.

Blue Rock WI
Enterprise-based Performance Improvement

SMART Goal Setting Overview

	Component	Description	Questions to Ask	Sample *"Go to France next year"*
S.	Specific	Specific initiatives are clear, precise and unambiguous; they describe **exactly** what is expected.	Who? What? Where? What are the requirements?	Go to **Paris and Marseille** next year.
M.	Measurable	Measurable initiatives require you to establish concrete criteria for measuring progress toward attainment of each goal you set.	How much? How many? How will we know it is accomplished? Can the change be seen as it occurs?	Go to Paris and Marseille **for 2 weeks** next year.
A.	Attainable (Accountable)	Attainable initiatives are realistic and attainable in the current environment. The resources are available to ensure the desired outcome is within reach. The best goals require contributors to stretch just a bit to achieve them.	Can the objectives pertaining to this initiative be carried out? If so, in what manner will they be carried out? Is there a benchmark available? Who owns this initiative?	**I will** go to Paris and Marseille for 2 weeks next year, **and will set aside $335 a month for the next 10 months in order to fund the trip.**
R.	Results-based	Results-based initiatives support a concrete business outcome that is both valuable and meaningful. You (and other stakeholders) will be better off for having accomplished it. The resulting outcome should support or compliment other key strategies.	What business result are you trying to achieve? What tangible value is created by accomplishing this initiative? How will the organization be different/better when it is accomplished?	I will go to Paris and Marseille for 2 weeks next year **to research my family ancestry** and will set aside $335 a month for the next 10 months in order to fund the trip.
T.	Time-bound	Time-bound initiatives have starting points, ending points, and fixed durations. There is a clear target date for accomplishment.	When will the initiative be completed? What are the key milestones?	I will go to Paris and Marseille for 2 weeks **in July** next year to research my family ancestry, and will set aside $335 a month for the next 10 months in order to fund the trip.

brettremington@bluerockwi.com   262.893.5971   www.bluerockwi.com

Strategic Plan Development for 2017-2019

Step 1 Review & Analyze (March 22, 2016)

Review Stakeholders
Review Stakeholder expectations
Review/Revise Mission, Vision, & Guiding Principles
Core Values Assessment **(April 12, 2016)**

Step 2 Review & Analyze (May 12, 2016)

PESTLE Analysis
Identify Key Advantages and Challenges
Identify Strategic Objectives and Goals
Identify Strategic Action Plans, Measures, & Targets

Step 3 Department Goal Alignment (June 14, 2016)

Department goal alignment & development
Development of SMART goals

Step 4 Department Goal Deployment (June)

Finalize Goals and Action Plans
Share Strategic Plan with staff

Step 5 Data & Comparators (July)

Develop comparative data sources
Establish data collection and management system

Step 6 Improve & Share (August-November)

Implement Action Plans
Develop format to share learning

Step 7 Recognize & Reward (December)

Recognize progress on goals
Reward staff for progress on goals