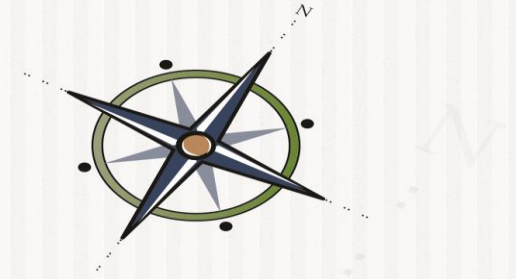


Organizational Excellence Specialists

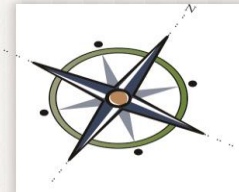


Strategy and Organizational Excellence

Institute of Industrial and Systems Engineers

February 23, 2023





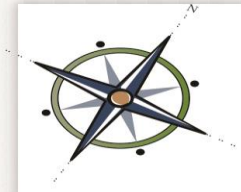
What is Strategy?



Strategy

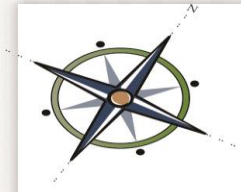
- Strategy - plan of action designed to achieve an overall aim
 - Strategic plan
 - Corporate statements
 - SWOT analysis
 - Strategic priorities
 - Goals
 - Objectives

Other plans must align with the strategic plan: business, financial, marketing, operations, human resource...



SWOT Analysis

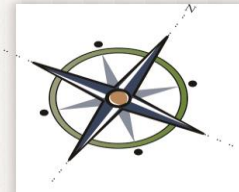
Strengths and Weaknesses	Opportunities and Threats
Governance	Political
Leadership	Economic
Planning	Social
Customers	Technology
Employees	Legal
Work Processes	Environment
Suppliers and Partners	
Resource Management	
CI & Performance Measurement	



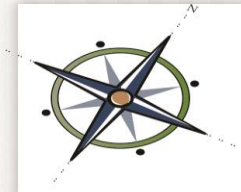
Identify Strategic Priorities

- Build on strengths
- Address weaknesses
- Capitalize on opportunities
- Mitigate threats

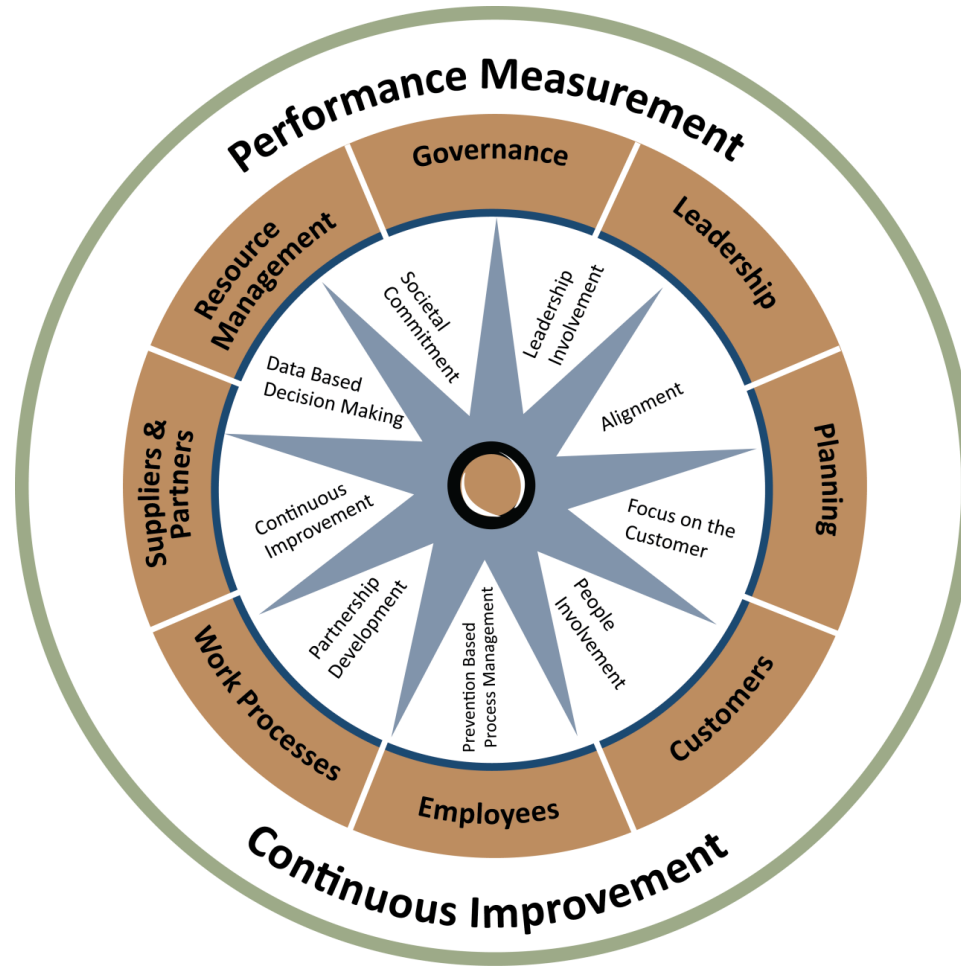




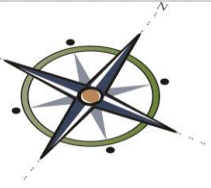
What is Organizational Excellence?



Organizational Excellence Framework



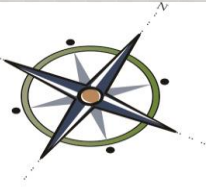
Source: Dawn Ringrose © 2010



Principles

1. Leadership involvement
2. Alignment
3. Focus on the customer
4. People involvement
5. Prevention based process management
6. Partnership development
7. Continuous improvement
8. Data based decision making
9. Societal commitment

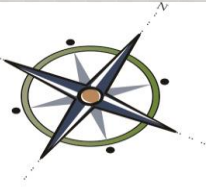
Degree to which the culture is committed to excellence



Key Management Areas

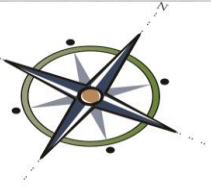
1. Governance
2. Leadership
3. Planning
4. Customers
5. Employees
6. Work Processes
7. Suppliers & Partners
8. Resource Management
9. Continuous Improvement & Performance Measurement

Degree to which the best management practices are deployed throughout the organization



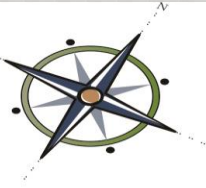
Performance Measurement

Key Management Area	Examples
Governance	Community perception of governance
Leadership	Degree leadership is shared
Planning	Understanding about business plan
Customers	Customer confidence
Employees	Effectiveness of training
Work Processes	Level of service / product quality
Suppliers & Partners	Quality and value of purchases
Resource Management	ROI, innovation rate, access to knowledge, optimization of transportation



Performance Measurement

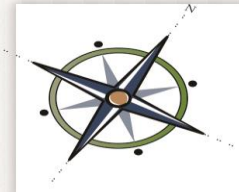
- Organization wide measures:
 - Relevance to marketplace
 - Capability to manage change
 - Meeting stakeholder objectives
 - Community perception of organization as model of excellence
 - Quality of products or services
 - Performance accomplishments and program outcomes
 - Customer satisfaction
 - Customer loyalty
 - Customer confidence
 - Employee satisfaction
 - Employee morale
 - Financial performance



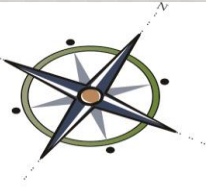
Exceptional Results

- Good governance
- Trust in leadership
- Customer delight
- Employee engagement
- Continually improving work processes
- Strong supplier and partner relationships
- Better utilization of resources
- Financial

Validated by global
research since 1990

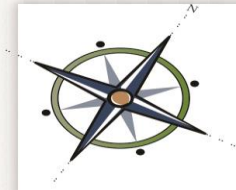


Assessment



Assessment Tasks

- Involve good cross-section of employees
- Orient employees to organizational excellence and assessment instrument
- Invite employees to self-assess the organization against the:
 - Principles
 - Best Management Practices
- Prepare feedback report:
 - Ratings
 - Open-ended comments
 - Action plans



Assessment Results

INTERRELATIONSHIPS		Leadership Involvement	Alignment	Focus on the Customer	People Involvement	Prevention Based Process Mgmt	Partnership Development	Continuous Improvement	Data Based Decision Making	Societal Commitment
PRINCIPLES		7.00	5.88	6.50	5.63	4.88	4.88	4.00	5.88	6.38
KEY MANAGEMENT AREAS WITH BEST MANAGEMENT PRACTICES										
1.0 Governance										
1.1 Identify governance responsibility to stakeholders	5.34		5.94						5.94	5.94
1.2 Implement system of authority, accountability, control	4.61								4.61	
1.3 Ensure governance system meets obligations*	6.11								6.11	6.11
1.4 Establish governance processes at all appropriate levels	4.76		4.76	4.76	4.76					4.76
1.5 Act as model of good practice for the community	4.34									4.34
1.6 Communicate policy & strategy to stakeholders	4.47	4.47								
	4.94									
2.0 Leadership										
2.1 Develop corporate statements*	7.08	7.08		7.08						
2.2 Communicate corporate statements to all levels*	6.50	6.50		6.50						
2.3 Identify factors that contribute to organizational success	4.61	4.61		4.61						
2.4 Develop strategic plan that will guide toward vision	6.14	6.14	6.14							
2.5 Use risk mgmt to assess strategic goals & objectives	3.36					3.36				
2.6 Monitor & review strategic plan on regular basis	5.12							5.12		
2.7 Ensure senior mgmt demonstrates commitment to improvement *	5.19	5.19						5.19		
2.8 Ensure senior mgmt participates in professional events	4.50									4.50
2.9 Remove barriers to organizational effectiveness	2.22					2.22		2.22		
2.10 Promote teamwork amongst employees*	3.67			3.67						
2.11 Communicate openly to employees about performance	4.39	4.39								
2.12 Share responsibility, accountability, leadership	2.78		2.78	2.78						
2.13 Link senior mgmt rewards & recognition to performance	1.56	1.56		1.56					1.56	
2.14 Demonstrate responsibility to society & environment*	3.53									3.53
2.15 Learn from ideas & practices & share internally & externally	3.83							3.83		3.83
	4.30									
3.0 Planning										
3.1 Use factual information for business planning*	4.42								4.42	
3.2 Create business plan that supports strategic direction*	3.91	3.91	3.91	3.91					3.91	
3.3 Develop contingency plans for unforeseen events	3.27					3.27			3.27	3.27
3.4 Communicate & integrate business plan internally & externally	3.12	3.12					3.12			
3.5 Allocate resources to ensure implementation of business plan	3.64	3.64	3.64	3.64						
3.6 Conduct capability gap analysis for resources	0.86	0.86				0.86				
3.7 Reallocate resource requirements to adjust to change	2.39	2.39				2.39				
3.8 Monitor & review business plan regularly*	2.81							2.81		
3.9 Make changes to business plan aimed at improvement*	2.61							2.61		
	3.00									
4.0 Customers										
4.1 Use research to define & segment customers*	3.53		3.53						3.53	
4.2 Determine customer needs & expectations*	3.53		3.53							
4.3 Communicate value of products & services to customer*	3.00		3.00							
4.4 Align employees on importance of customer*	4.81		4.81	4.81						
4.5 Train & empower employees to be advocates for customer*	5.33		5.33	5.33						
4.6 Ensure positive experiences by managing contact points*	3.08		3.08							



Action Plan

Key Management Area:

Practise:

Action Steps:

1.

2.

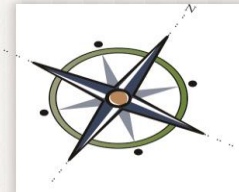
3.

Responsibility:

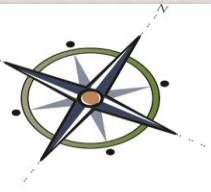
Timing:

Measurement:

Cost:

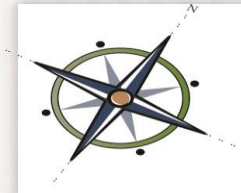


Map Assessment Results to Strategic Plan



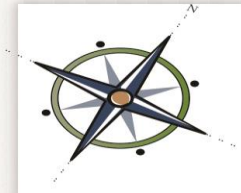
Assessment and Strategic Plan

1. Review strategic plan and assessment feedback report
2. Map assessment action plans to strategic plan
3. Prioritize assessment action plans
4. Assign action plans to employees
5. Schedule regular meetings
6. Have employees report on progress
7. Bring progress updates forward when reviewing and monitoring strategic plan
8. Celebrate success along the way

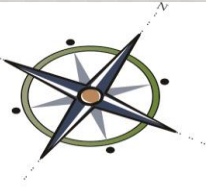


Map Assessment Action Plans to Strategic Plan

	Vision	Mission	Values	Goals & Objectives
Governance				
Leadership				
Planning				
Customers				
Employees				
Work Processes				
Suppliers & Partners				
Resource Management				
CI & Performance Measurement				

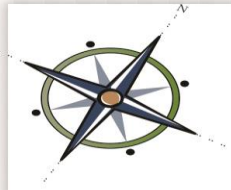


Benefits



Benefits

- Provides a strategic approach to move an organization from current state to desired future state
- Helps leadership communicate and involve employees in working toward a common aim
- Provides an integrated and coordinated way to drive tangible results
- Provides an umbrella under which quality approaches and improvement initiatives can be brought together:
 - ISO Standards
 - Lean
 - Six Sigma



Thank You !

Dawn Ringrose MBA, FCMC

Principal, Organizational Excellence Specialists

Executive, Organizational Excellence Technical Committee QMD ASQ

Board, ISCM Foundation

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