

ROADMAP FOR THE DEVELOPMENT OF AN ORGANIZATION/UNIT/PROGRAMS/TEAMS

FAST, REACTIVE, DEVELOPING

STEADY, PROACTIVE, SUSTAINING

PACE

BUILD

LEVEL 1

GROW

LEVEL 2

MATURE

LEVEL 3

STRATEGY/LEADERSHIP

Strategy

- Develop mission, vision, values - engage staff at all levels
- Set strategic objectives and goals
- Create budget tied to strategic plan
- Identify benchmarking and ongoing data collection to track/evaluate success and strategic alignment
- Understand and mitigate risk

Leadership

- Develop and articulate leadership standards
- Develop leadership roles and responsibilities
- Hold frequent meetings to refine strategy; get to know staff and their abilities/backgrounds

Communications

- Develop and implement internal/external communications plan

Strategy

- Revisit mission, vision, values to update based on first year; conduct strategic planning for individual units
- Update budget to reflect changes in strategy and plan
- Develop data dashboard to track and review organizational performance aligned with strategy
- Understand and mitigate risk

Leadership

- Incorporate leadership standards into performance management, employee development plans, and culture (meetings, etc.)
- Identify and implement leadership development

Communications

- Refine, improve, and standardize communications approach so people know what to expect and where to go for information

Strategy

- Evaluate and iterate mission, vision, values
- Update and focus strategy and plans for units
- Work on longer-term budget and plan with a focus on sustainability
- Understand and mitigate risk
- Continuously assess risk and compliance issues

Leadership

- Create new development opportunities for leaders
- Develop succession plan for leaders

Communications

- Proactively seek input on what people need to know and how to find information

CUSTOMERS

Customer Focus

- Define customers and services and create stakeholder map
- Build relationships with customers
- Create customer service standards

Data

- Implement process for customer feedback (surveys, focus groups, etc.)

Tools

- Develop website and customer communication tools

Customer Focus

- Build and maintain customer relationships
- Improve understanding of customer needs

Data

- Incorporate customer feedback into Service Level Agreements and establish performance metrics

Tools

- Reevaluate website for user satisfaction

Customer Focus

- Develop Customer Relationship Management (CRM) plan

Data

- Use customer feedback for planning/forecasting
- Use customer feedback in Continuous Process Improvement

Tools

- Change/update website and communication tools (as needed)

PEOPLE

Capacity

- Identify positions/skills needed and performance standards
- Develop and execute against hiring timeline
- Plan to hire diverse set of team members

Operationalize

- Build participatory culture (create working teams, seek collaboration opportunities with other departments)
- Establish norms (meetings, scheduling, decision-making)
- Establish onboarding process
- Establish recognition program
- Create and implement internal communication structure

Customer Focus

- Train on service standards

Capacity

- Implement employee development program (including coaching)
- Develop new employee opportunities (project leads, etc.)

Operationalize

- Assess employee performance, engagement, and areas for improvement
- Evaluate/expand recognition program

Customer Focus

- Promote a culture of service (integrate with employee development plans, performance management)
- Assess service and identify areas for improvement

Capacity

- Assess and practice continuous improvement
 - Provide mentoring
 - Improve team-based practices and competency
 - Enhance team expertise (training etc.)

Operationalize

- Practice continuous improvement
- Develop and implement employee retention and succession plan

Customer Focus

- Implement continuous improvement

WORK

Establish and Identify Processes

- Assess current state:
 - Roles and responsibilities
 - Processes and procedures
 - Operational performance measures
 - Meeting cadence, format/type (1:1, group, retreat), timing and audience/attendees
 - Workflows, resources assignments, and capacity
- Understand documented/undocumented organizational knowledge
- Establish overall understanding, methodology, and adherence to documented processes and procedures
- Begin tracking and build awareness for incidents and errors
- Benchmark and learn best practices from peers/industry

Continuous Process Improvement

- Develop framework for staff to identify and communicate issues and errors
- Ensure work is standardized, reduce variability within unit
- Establish basic measures and begin tracking and performing analysis
- Work toward eliminating paper-based manual processes
- Build visibility into workflow - for both internal staff and customers (as appropriate)
- Prioritize work and effort based on alignment with strategic priorities
- Benchmark and learn best practices from peers/industry
- Evaluate progress and modify approach to achieve desired results

Continuous Process Improvement

- Proactively address issues with robust performance analysis
- Track and report incident or error resolution
- Create cross functional process standardization and process improvement
- Eliminate redundant or misaligned efforts
- Establish clear roles, responsibilities and accountabilities
- Benchmark and learn best practices from peers/industry

INFRASTRUCTURE

Technology and Space

- Identify space needs to support organization
- Identify technology and tools needed
- Determine website for internal and external communication
- Determine systems to use

Data

- Create data and tracking processes
- Establish policies and procedures

Technology and Space

- Align space and technology
- Ensure collaboration systems are in place
- Provide tools and resources for positions and teams

Data

- Prepare and use metrics and reports for decision-making
- Implement data management governance and policies

Technology and Space

- Integrate systems internally and externally
- Automate systems to support workflow
- Plan for capital or equipment replacement

Data

- Share, advise, and consult with others