



Balanced Strategic Planning & Management for Mission-Driven Organizations

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February 2022

Center for Excellence in Public Leadership
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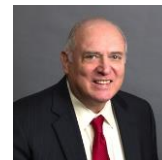
Welcome and Topics

Topics:

- Challenges standing in the way of improving performance in government and other mission-driven organizations, and what can be done to address them
- Tools and techniques to improve performance
- A disciplined process for getting more balance and creating more high performance



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Selected Clients



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Adopt a Balanced, More Disciplined Approach to Improve Mission-Driven Organization Performance

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A Balanced Systems Approach Addresses Many Government / Mission-Driven Organization Challenges

- Program Effectiveness/ Value
- Accountability for Results
- Evidence-Based Decision Making
- Informed Budget Process
- Continuous Improvement
- Organization Alignment

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A Formal, Balanced Approach to Performance Management Answers Key Questions and "Connects Dots"

What is our mission and vision for a successful future?

What is our strategy and plan?

How do we align programs, services, departments, and employees with the plan?

How do we measure progress, prioritize work, and get the important stuff done?

- Performance Questions:
- "What are we trying to accomplish?"
 - "How will we know success when we see it?"
 - "How will we monitor and report success using simple, concrete terms?"

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Changes in People's Mindset and Behaviour Contribute to Improved Performance

Change = Transformation

- Establishing what needs to change and the reasons
- Creating a guiding coalition that builds an engaged leadership team and a dedicated workforce:
 - A clear shared picture of future success
 - Effective communication
 - A clear road map
 - Evidence of success – Using performance measures



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Balanced Strategic Planning

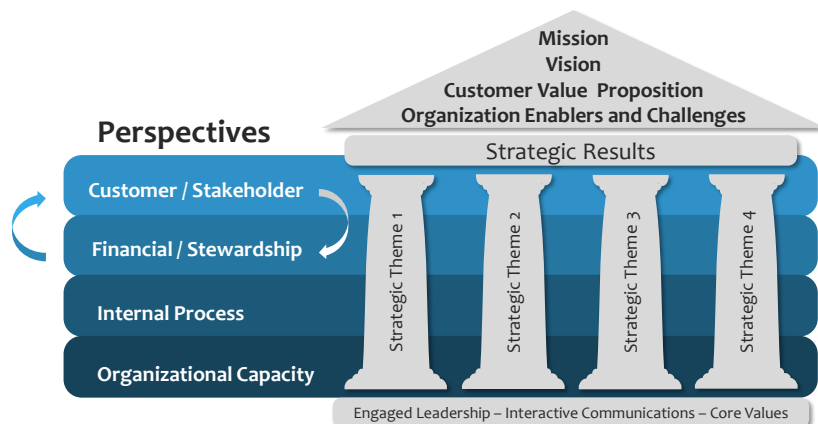


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Balanced Strategy Built on “Pillars of Excellence”



“Balanced” = f (short/long term, financial/non-financial, leading/lagging, internal/external, strategic/operational, customers/employees, stability/agility, people/profits/planet)

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Some Tools to Help Improve Performance

Tools/Techniques

- Scenario Planning
- SWOT/PESTLE
- Stakeholder Focus Groups
- Customer/Competition Profile (Strategy Canvas)
- Customer Value Proposition
- Strategic Goals (Intended Results)
- Strategy Map
- Balanced KPI Development Process
- Balanced Strategic Plan
- Balanced Scorecard System
- Change Management Plan
- Capacity-Capability-Competency Matching
- Process Improvement/Lean/Six Sigma



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Selected Tools and Purpose

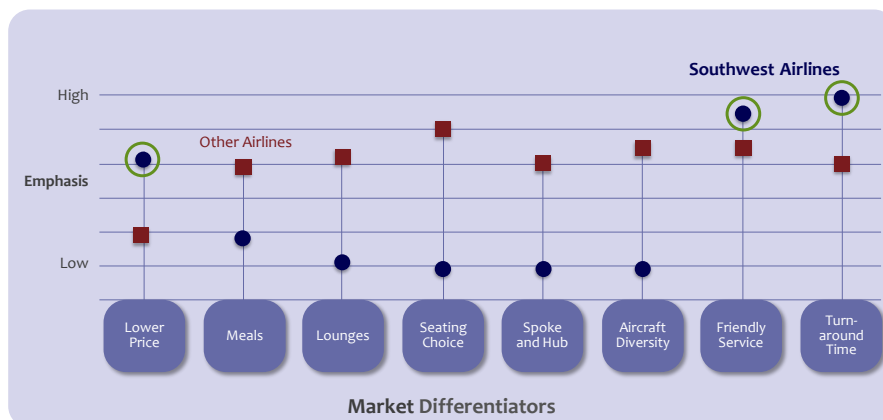
Tool	Application
• Strategy Profile	• Compares key attributes of your organization to others/best practices
• Customer Value Proposition	• Defines value through stakeholders' eyes
• Strategy Map	• Improves communication clarity internally and externally; alignment
• Balanced KPI Development	• Measures what matters... not what's easy to measure
• Balanced Scorecard	• Improves communications, alignment, and focus on strategy and what matters
• Cascading Strategy	• Aligns the workforce and processes to organization strategy

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The Strategy Profile Compares “As Is” to “To Be”



This “Strategic Performance Profile” or “Strategy Canvas” allowed Southwest to understand and build market share by focusing on *differentiators*.

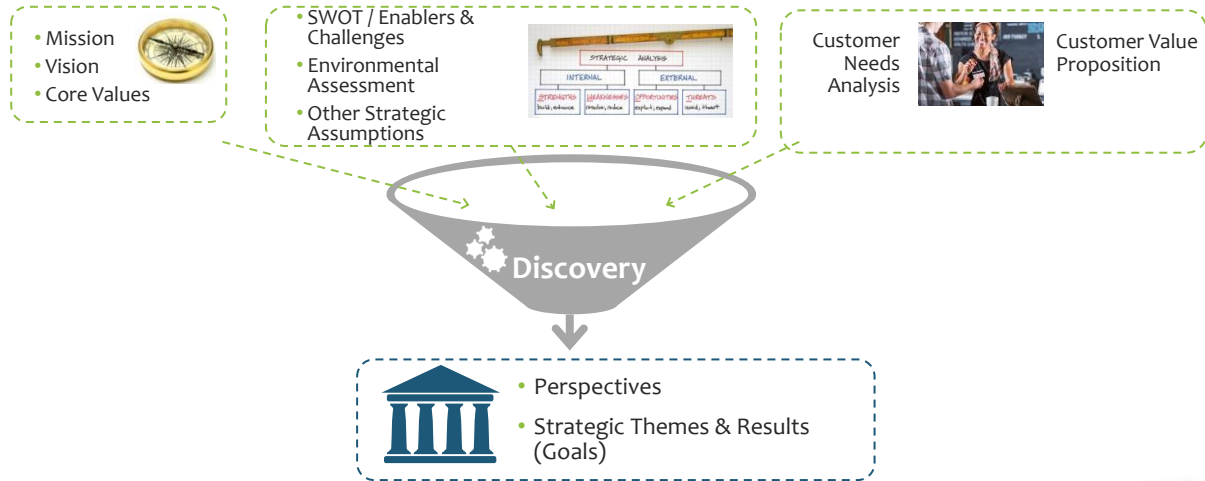
Source: Adapted from *Charting Your Company's Future*, W. Chan Kim and Renée Mauborgne, HBR, June 2002.

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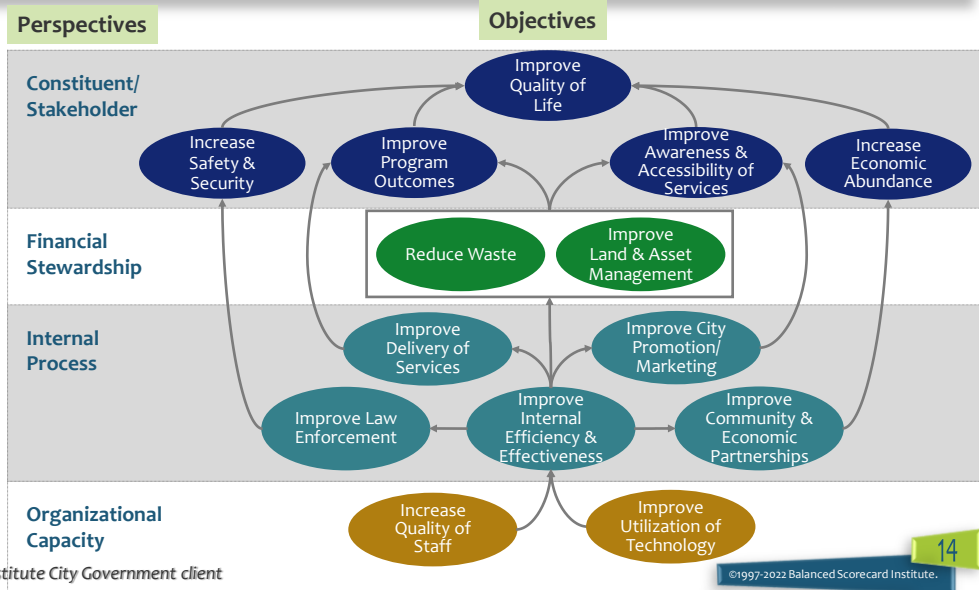
BALANCED SCORECARD INSTITUTE Understand Customer Needs, and Formulate Strategy Through a Process of Strategic Thinking and Discovery



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BALANCED SCORECARD INSTITUTE Strategy Maps Help Visualize Linkages Between Objectives

- **4 Perspectives** are lenses to view the organization
- **Objectives** are continuous improvement action statements
- **Strategy Maps** shows upward flow and cause-effect relationships



Source: Balanced Scorecard Institute City Government client

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BALANCED SCORECARD INSTITUTE Example: Translate Strategy Into Action

Strategic Objectives and Strategy Map

Desired End Outcome				
Objective Description	Intended Results	Performance Measures	FY 2022 Targets	Strategic Initiatives
This objective deals with improving processes for efficient energy generation, utility service reliability, and customer-facing services. We can and should make improvements in these areas.	<ul style="list-style-type: none"> Our service excellence reputation is characterized by timely installations, prompt repairs, efficient customer service, and utility service reliability in the top 5% of our industry. 	<ul style="list-style-type: none"> Average new-installs installation time Average repair time Average time to respond to a customer question Average outage duration 	<ul style="list-style-type: none"> Less than or equal to 14 business days Less than or equal to 2 days Less than or equal to 4 hours Less than or equal to 82 minutes 	<ul style="list-style-type: none"> Customer facing process bottleneck improvement program Advanced repair training for field staff Expanded Q&A database for call center

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BALANCED SCORECARD INSTITUTE Different Types of Measures Are Used to Measure Progress Towards Results

Operational

Inputs: cost of *Dropout Prevention Programs* in \$ or FTEs

Process: delivery of program quality or consistency measures

Outputs: # of programs held or # of people attending parenting programs

Strategic

Outcomes: parent program graduations or behavior improvement; child school attendance; *child dropout rates*

Project

Project: Curriculum redesign schedule and resource attainment

Employee

Employee: Instructor skills measures

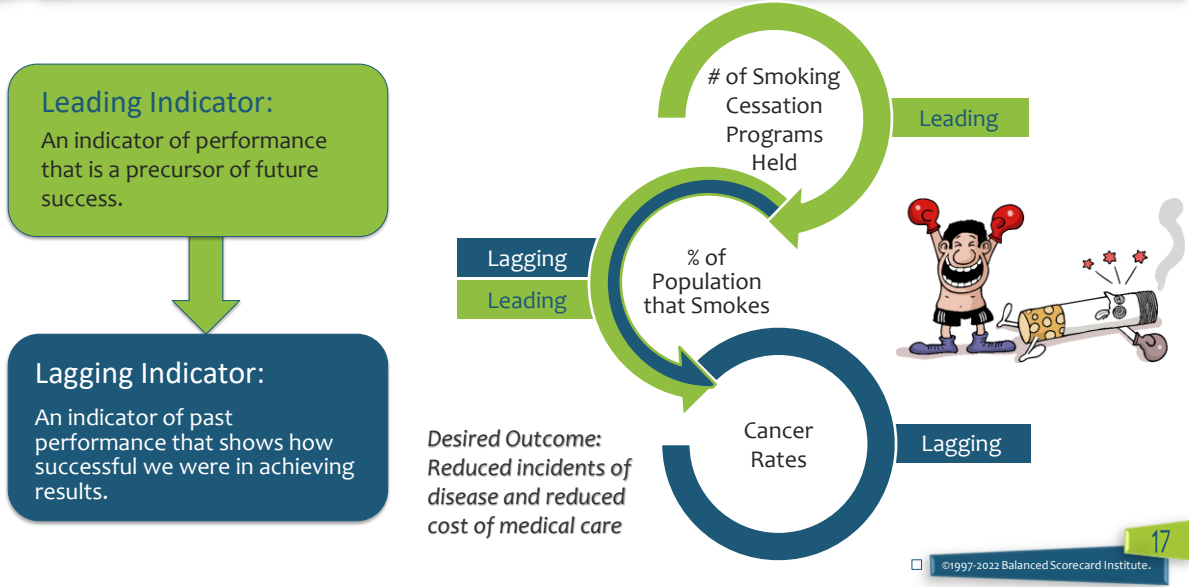
Risk

Risk: parental, child, or cultural backlash; negative behavior results

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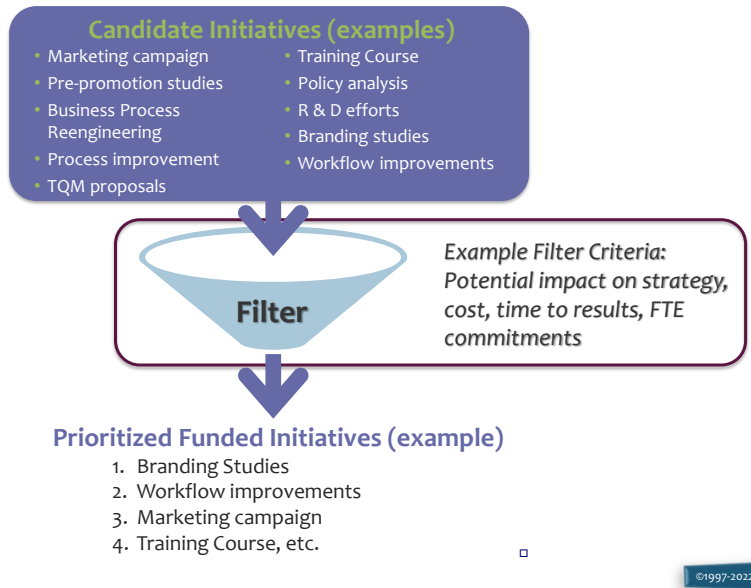
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BALANCED SCORECARD INSTITUTE Understand Leading and Lagging KPIs



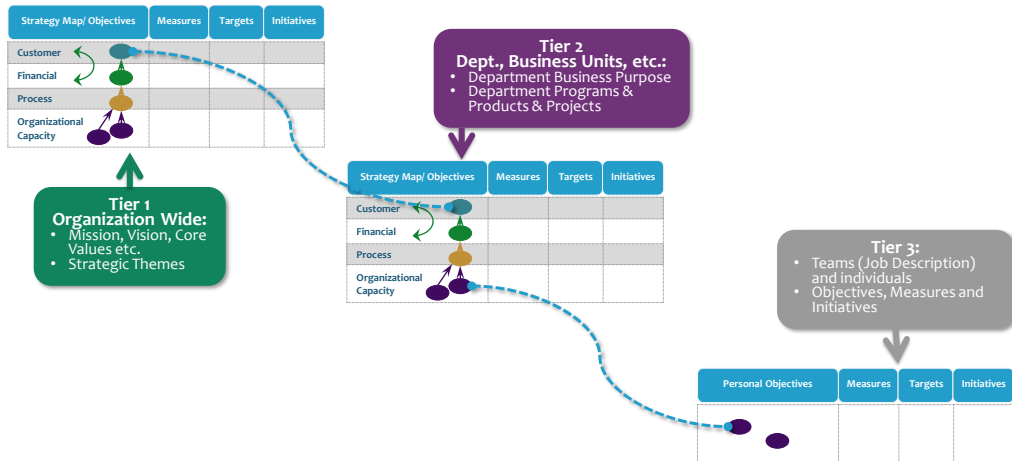
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BALANCED SCORECARD INSTITUTE Identify Potential Strategic Initiatives

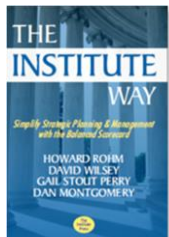


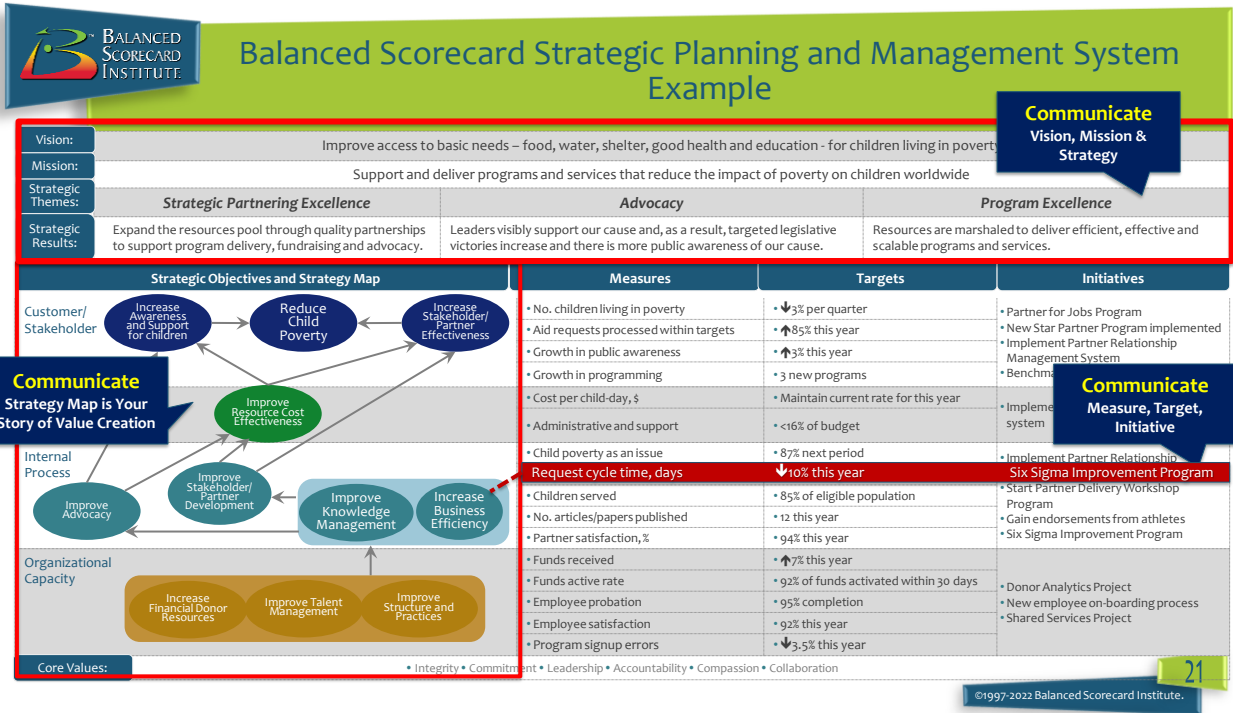
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BALANCED SCORECARD INSTITUTE Cascading Strategy Aligns the Workforce, Processes, IT, and Projects

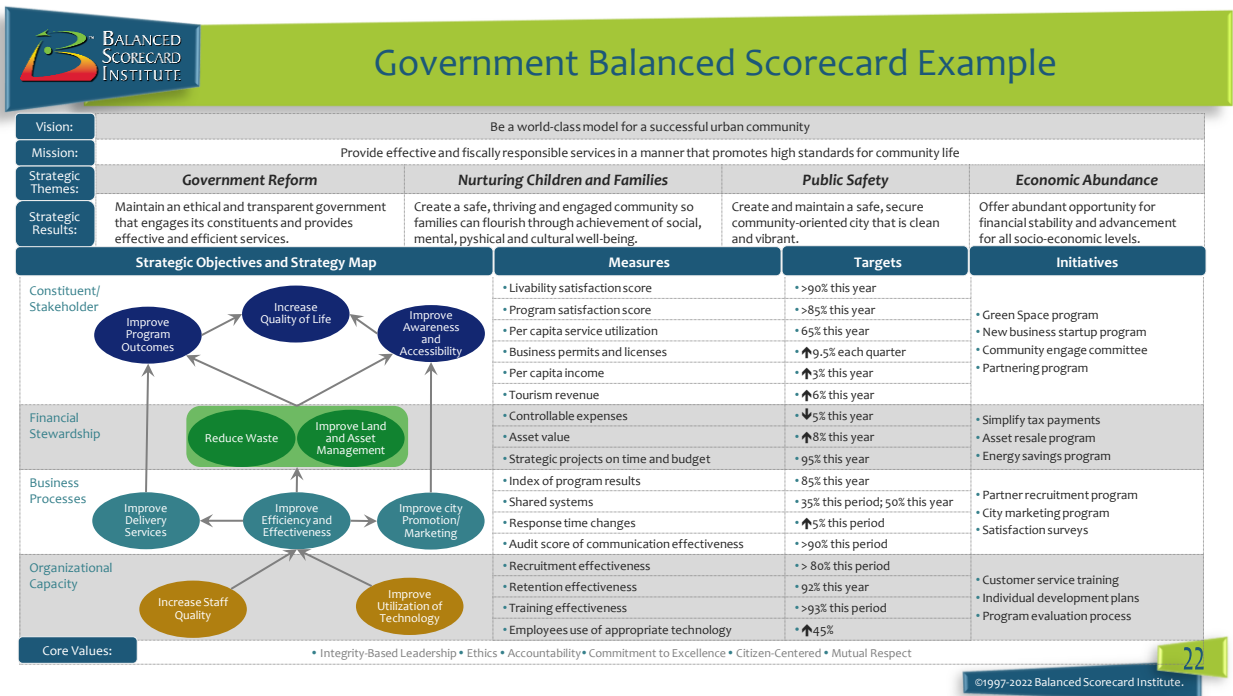


BALANCED SCORECARD INSTITUTE Building & Implementing a Balanced Scorecard: Nine Steps To Success™





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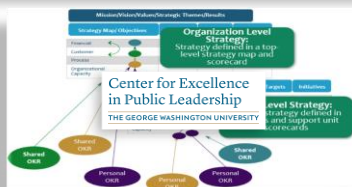


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BALANCED SCORECARD INSTITUTE Strategic Planning and Management Support



Consulting & Facilitation



Balanced Scorecard, KPI and OKR Training and Certification



Executive & Team Training



SMO / PMO Establishment & Improvement



Strategy Systems Development, Management & Implementation



Strategy Execution & Process Improvement

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