## TOOL 1: ROADMAP

### BUILD

#### Level 1

- **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 plans

### GROW

#### Level 2

- **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

### MATURE

#### Level 3

- **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
- **Communication**
  - 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

## PEOPLE

- **Capacity**
  - Identify positions/skills needed and performance standards
  - Develop and execute against hiring timeline
- **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

## WORK

- **Establish and Identify Processes**
  - Identify and establish 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

## TECHNOLOGY AND SPACE

- **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
  - Create data and tracking processes
  - Establish policies and procedures
- **Data**
  - Prepare and use metrics and reports for decision-making
  - Implement data management governance and policies

## INFRASTRUCTURE

- **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

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*[Image of roadmap and chart with sections for strategic planning, people, processes, technology, space, infrastructure, and tools with specific actions and tasks]*