

TOOL 1: ROADMAP

PACE FAST, REACTIVE, DEVELOPING → STEADY, PROACTIVE, SUSTAINING

STRATEGY/LEADERSHIP **BUILD** LEVEL 1 **GROW** LEVEL 2 **MATURE** LEVEL 3

CUSTOMERS	<p>Strategy</p> <ul style="list-style-type: none"> 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 <p>Leadership</p> <ul style="list-style-type: none"> Develop and articulate leadership standards Develop leadership roles and responsibilities Hold frequent meetings to refine strategy; get to know staff and their abilities/backgrounds <p>Communications</p> <ul style="list-style-type: none"> Develop and implement internal/external communications plan 	<p>Strategy</p> <ul style="list-style-type: none"> 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 <p>Leadership</p> <ul style="list-style-type: none"> Incorporate leadership standards into performance management, employee development plans, and culture (meetings, etc.) Identify and implement leadership development <p>Communications</p> <ul style="list-style-type: none"> Refine, improve, and standardize communications approach so people know what to expect and where to go for information 	<p>Strategy</p> <ul style="list-style-type: none"> 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 <p>Leadership</p> <ul style="list-style-type: none"> Create new development opportunities for leaders Develop succession plan for leaders <p>Communication</p> <ul style="list-style-type: none"> Proactively seek input on what people need to know and how to find information
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PEOPLE	<p>Customer Focus</p> <ul style="list-style-type: none"> Define customers and services and create stakeholder map Build relationships with customers Create customer service standards <p>Data</p> <ul style="list-style-type: none"> Implement process for customer feedback (surveys, focus groups, etc.) <p>Tools</p> <ul style="list-style-type: none"> Develop website and customer communication tools 	<p>Customer Focus</p> <ul style="list-style-type: none"> Build and maintain customer relationships Improve understanding of customer needs <p>Data</p> <ul style="list-style-type: none"> Incorporate customer feedback into Service Level Agreements and establish performance metrics <p>Tools</p> <ul style="list-style-type: none"> Reevaluate website for user satisfaction 	<p>Customer Focus</p> <ul style="list-style-type: none"> Develop Customer Relationship Management (CRM) plan <p>Data</p> <ul style="list-style-type: none"> Use customer feedback for planning/forecasting Use customer feedback in Continuous Process Improvement <p>Tools</p> <ul style="list-style-type: none"> Change/update website and communication tools (as needed)
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WORK	<p>Capacity</p> <ul style="list-style-type: none"> Identify positions/skills needed and performance standards Develop and execute against hiring timeline <p>Operationalize</p> <ul style="list-style-type: none"> 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 <p>Customer Focus</p> <ul style="list-style-type: none"> Train on service standards 	<p>Capacity</p> <ul style="list-style-type: none"> Implement employee development program (including coaching) Develop new employee opportunities (project leads, etc.) <p>Operationalize</p> <ul style="list-style-type: none"> Assess employee performance, engagement, and areas for improvement Evaluate/expand recognition program <p>Customer Focus</p> <ul style="list-style-type: none"> Promote a culture of service (integrate with employee development plans, performance management) Assess service and identify areas for improvement 	<p>Capacity</p> <ul style="list-style-type: none"> Assess and practice continuous improvement <ul style="list-style-type: none"> Provide mentoring Improve team-based practices and competency Enhance team expertise (training, etc.) <p>Operationalize</p> <ul style="list-style-type: none"> Practice continuous improvement Develop and implement employee retention and succession plan <p>Customer Focus</p> <ul style="list-style-type: none"> Implement continuous improvement
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INFRASTRUCTURE	<p>Establish and Identify Processes</p> <ul style="list-style-type: none"> Identify and establish current state: <ul style="list-style-type: none"> 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 	<p>Continuous Process Improvement</p> <ul style="list-style-type: none"> 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 	<p>Continuous Process Improvement</p> <ul style="list-style-type: none"> 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
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INFRASTRUCTURE	<p>Technology and Space</p> <ul style="list-style-type: none"> Identify space needs to support organization Identify technology and tools needed Determine website for internal and external communication Determine systems to use <p>Data</p> <ul style="list-style-type: none"> Create data and tracking processes Establish policies and procedures 	<p>Technology and Space</p> <ul style="list-style-type: none"> Align space and technology Ensure collaboration systems are in place Provide tools and resources for positions and teams <p>Data</p> <ul style="list-style-type: none"> Prepare and use metrics and reports for decision-making Implement data management governance and policies 	<p>Technology and Space</p> <ul style="list-style-type: none"> Integrate systems internally and externally Automate systems to support workflow Plan for capital or equipment replacement <p>Data</p> <ul style="list-style-type: none"> Share, advise, and consult with others
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