

STRATEGY PLANNING THROUGH IMPLEMENTATION

WACUBO BMI 2019

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GROUND RULES

- Be on time, come prepared, and end on time
- Stay with agenda unless team decides to deviate or move on; keep on the subject and current issue
- Do work assigned between meetings; follow through on commitments
- Give permission to question and be questioned
- Help include others, share the floor, and allow for all voices
- Free yourself of distractions (phones, e-mail)
- Minimize paper – go green
- If a member misses a meeting, take responsibility to catch up
- Have open, free communications
- Maintain a safe environment
- Assume best intent, don't take things personally
- Ask for clarity when needed
- Be positive – change is hard
- Celebrate success
- 80% is good enough!

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AGENDA

- Session One: Strategy Planning Overview
- Session Two: SWOT, Mission, Vision, Values and Strategy Mapping
- Session Three: Action Planning and Lean Process Improvement
- Session Four: Demonstrating Knowledge
- Session Five: Leading Change and Course Summary



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CASE STUDY WORK AND TEAMS

- In teams, you will complete work assignments and report out at last session
 - SWOT analysis
 - Strategy map (mission, vision, values, strategic goals)
 - Activity Scope related to one strategic goal
 - Presentation



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Session one: Strategic Planning Overview

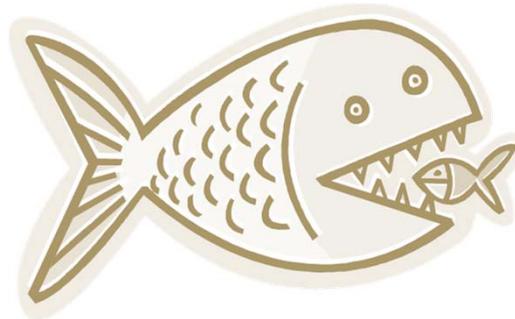


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BUT FIRST, WHAT ABOUT CULTURE?

- Culture can eat strategy for lunch, but without strategy you cannot change the culture!



Peter Drucker

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WHAT IS STRATEGIC PLANNING?

“Strategic planning is the process by which the guiding members of an organization envision its future and develop the necessary procedures and operations to achieve that future.”

- J. William Pfeiffer, Leonard D. Goodstein, and Timothy Nolan of University Associates, Inc.

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CONTINUUM

Each of these components needs the other two in order to make an impact in an organization



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ENGAGE, ENVISION AND TRANSFORM

- Strategic planning is aimed at **engaging with work groups to envision the future and manage the inevitable changes** caused by economic conditions, leadership, student, patient, or organizational needs and technology. It assists organizations to **help shape the future**, rather than to simply prepare for or adapt to the future. It also looks very carefully at current performance and allows for analysis of the gaps between the present and the envisioned future.
- Because all levels of staff and faculty are to be included in this process, all tasks and positions are open to evaluation. The Applied Strategic Planning Model looks at the values held and articulated by the organization and fits those values into the mission of the organization and the plans that are made. **Decisions are made more easily and are consistent with predetermined goals, values and missions.**
- Another goal of strategic planning is **to transform the strategic plan into individual plans and actions** and to reward behavior accordingly.

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STRATEGY IS ABOUT



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ASSUMPTIONS AROUND STRATEGIC PLANNING

- The process of planning is as important, as the product.
- It can be painful.
- It requires changing the culture of the organization.
- It is a crafting process.
- It develops the form and function of the organization.
- An organizational development tool designed to influence the future, to anticipate and respond appropriately to changing times, to increase productivity and to develop consensus and commitment.
- Strategic planning is about shaping change.

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STRATEGIC PLANNING FEATURES

- Strategic decision making means its leaders are **active** rather than passive about their position in history.
- Strategic planning **looks outward** and is focused on keeping the organization in step with the changing environment.
- Strategy making is **competitive**, recognizing that organizations are subject to economic market conditions and to increasingly strong competition.
- Strategic planning **concentrates on decisions**, not on documented plans, analyses, forecasts and goals.
- Strategic planning is people acting decisively (and roughly in concert) to carry out a strategy they have helped devise.
- Strategy making is a **blend of rational and economic analysis, political maneuvering and psychological interplay**. It is therefore participatory and highly tolerant of controversy.
- Strategic planning concentrates on the fate of the organization above everything else.

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10 PRINCIPLES OF STRATEGY THROUGH EXECUTION

1. **Aim High** – lead, communicate, set lofty goals, demonstrate courage and commitment
2. **Build on Your Strengths** – what makes us distinctive?
3. **Be Ambidextrous** – must be able to manage strategy planning and execution equally well
4. **Clarify Everyone’s Strategic Role** – and expect action in alignment
5. **Align Structures to Strategy** – reorganize if needed, collect metrics
6. **Transcend Functional Barriers** – don’t allow for silos, working independently, create cross functional teams

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10 PRINCIPLES, CONTINUED

7. Become Fully Digital
8. Keep It Simple, Sometimes
9. Shape Your Value Chain – engage your partners
10. Cultivate Collective Mastery – support, encourage, be flexible

“Fit For Growth”

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BENEFITS OF STRATEGIC PLANNING

- Increased effectiveness
- Increased efficiency
- Improved understanding and better learning
- Better decision making

John Bryson and Farnum Alston

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STRATEGIC PLANNING MODEL



J. William Pfeiffer, Leonard D. Goodstein,
and Timothy Nolan of University Associates, Inc.

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PHASE OF PLANNING: PLANNING TO PLAN

- Usually done in conjunction with the top level management in the organization, school or institution, this phase includes decisions on who will be involved in the process, how long it will take, who will perform certain tasks or roles, and other similar logistical issues.
- **Outcomes:**
 - Identification of the planners and their roles (usually no more than 12)
 - Understanding and support for planners to reallocate their responsibilities in order to participate
 - Awareness of the strategic planning model and the established time frame (for ex., 3–10 days in planning meetings over 9–12 months)
 - Determination of organizational assistance needed to enhance the planning effort

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ORGANIZATIONAL SUPPORT FOR STRATEGIC PLANNING

Instructions

This instrument will help you and your fellow participants examine the strength of support in you organization for effective strategic planning. Sixteen conditions which foster effective strategic planning are listed below. Consider to what extent each condition is present in your organization and state your feelings by circling the number that best corresponds to your opinion. Add all of the circled numbers and write the total in the box provided.

	Not Very Present	Some-what Present	Mostly Present	Almost Completely present
1. Clarity of responsibilities between operation units	0	1	2	3
2. Successful history with planning and implementation	0	1	2	3
3. Prior skills in planning	0	1	2	3
4. Effective communication and feedback systems	0	1	2	3
5. Rewards for long-term thinking and action	0	1	2	3
6. Available information on the organization's business activities	0	2	4	6
7. Available information on the organization's business environment	0	2	4	6
8. Sufficient time and attention given to planning tasks	0	2	4	6
9. Good relations between segments of the organization	0	2	4	6
10. Desire among managers to do strategic planning	0	2	4	6
11. Financial and political stability	0	3	6	9
12. Willingness to take calculated risks	0	3	6	9
13. Demonstrated creativity	0	3	6	9
14. Demonstrated flexibility and adaptiveness to change	0	3	6	9
15. Skill at group process and interpersonal relations	0	3	6	9
16. Commitment of the senior leader to planning	0	3	7	10

Total Score (100 possible)

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PHASES OF PLANNING: VALUES AUDIT

- This phase includes two parts:
 - A discussion of core values the organization wants to embrace and how those values are articulated or presented to the staff and constituencies. This is a very important section of the strategic planning process because the values held and espoused directly affect what will or will not be accomplished within the work unit.
- **Outcomes:**
 - Agreement on shared organizational values
 - Statement of organizational values
 - Understanding of organizational culture and operating philosophies

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PHASES OF PLANNING: MISSION AND VISION

- The group reviews or writes a mission statement that clearly defines answers to three questions and defines the most important element: 1) what function is performed, 2) for whom and 3) how. Identifying the answers to these questions is often fairly easy; writing the mission statement to the group's satisfaction is most difficult. This should articulate the purpose of the organization and often doesn't change much.
- The group then writes a vision statement, a stretch into the future, of what it wants to achieve or be known for in the future. Sometimes groups combine mission and vision, for a visionary mission.
- **Outcomes:**
 - Identification of organization's primary mission and what makes it distinctive
 - Understanding of who the organization is primarily serving
 - Understanding of how the organization does its work
 - Agreed upon mission statement (clear, brief, realistic, reflective of values, energizing)
 - Agreement to a vision statement

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PHASES OF PLANNING: STRATEGIC GOAL SETTING

- This phase envisions the future, and defines goals and directions in the context of the functions it wants to perform. It looks at how to measure success, how to achieve it and how these elements fit within the mission of the unit. Decision making criteria is also determined in this phase.
- **Outcomes:**
 - Understanding of planners' orientation to creativity and risk
 - Identification of critical success measures
 - Understanding of primary functions/program areas
 - Understanding of the kind of culture needed to support the plan

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BIG HAIRY AUDACIOUS GOALS (BHAG)

- "A true BHAG is clear and compelling, serves as unifying focal point of effort, and acts as a clear catalyst for team spirit. It has a clear finish line, so the organization can know when it has achieved the goal; people like to shoot for finish lines."
 - Collins and Porras, *Built to Last: Successful Habits of Visionary Companies*
- Martin Luther King: I Have a Dream:
<https://www.youtube.com/watch?v=3vDWWy4CMhE>
- JF Kennedy: Why we go to the moon:
<https://www.youtube.com/watch?v=RaRC6YuYCO>

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PHASES OF PLANNING: PERFORMANCE AUDIT

- This audit analyzes the current or recent performance of the organization. Discussion of internal strengths and weaknesses and external opportunities and threats is held. This phase looks at communication methods, how tasks get completed, how duties are allocated and assessment of productivity.
- **Outcomes:**
 - Determination of how the performance audit will be conducted
 - Understanding of strengths, weaknesses, opportunities and threats to the organization (SWOT)
 - Measurement of the current performance of the organization

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PHASES OF PLANNING: GAP ANALYSIS

- The gap analysis is a comparison of the performance audit and the envisioned future. Plans are made to address any gaps.
- This phase can be disheartening to some if the gaps are large between current and desired performance.
- **Outcomes:**
 - Identification of the gaps between current performance and desired performance
 - Development of strategies to bridge the gaps, such as broadening the time frame, reducing the scope of the objective, reallocating resources to focus effort, or obtaining new resources

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PHASES OF PLANNING: CONTINGENCY PLANNING

- This phase includes considerations of any opportunities or threats which may occur to jeopardize the strategic plan. Examples might include changing economic times, a decrease in enrollments, leadership shifts or the assignment of new divisions or functions. The planners will develop indicators and plans to deal with contingencies based on factors that could affect the organization.
- **Outcomes:**
 - Understanding of the most important and probable internal and external vulnerabilities of, and opportunities for, the organization
 - Understanding of the point at which to take action if the contingency comes true
 - Developing and integrating

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PHASES OF PLANNING: ACTION PLANS

- This phase includes the development of the action plans and budgets (general-not overly detailed) by the units/teams. Plans may include impact to financial, human resources, operations, customer service and even marketing. The plans should ideally be completed before budget decisions are finalized so that they may be prioritized and incorporated. Plans are then checked against organizational values and the mission statement. This phase entails group agreement to work together, share resources and support each approved plan.
- **Outcomes:**
 - Consideration of appropriate organizational structure needed to make the plan successful
 - Identification of functions to submit supporting plan
 - Overall resource review (budgets, resources needed, etc.)
 - Understanding of predicted conflict between areas

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PHASES OF PLANNING: IMPLEMENTATION

- The final phase involves taking the action plans and integrating them within the organization. Implementation is the step in the strategic plan when the plans become functional. A review of the process, plans to evaluate progress, and a reward system need to be incorporated in this phase as well. Finally, the plan should capture the commitment of the organization, be consistent with its values, beliefs and culture, and spur the unit into action.
- **Outcomes:**
 - Creation of a communications plan to reinforce the strategic plan with all impacted
 - Identification of any changes needed to support the plan, e.g., management structure, reward system and/or information systems
 - Identification of ongoing training and tools needed to manage strategically

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LEADING THE EFFORT: YOUR ROLE

- The leader/planner role varies depending of the leader's skills, abilities and interests, and those of the organization he or she is leading. However, Mintzberg identifies several key qualities of the planner:
 1. Planners are crafters: they must have intimate knowledge of the area being studied and be flexible to shift as needed (think of a potter).
 2. Planners see patterns in action and plan for the future with consideration from patterns from the past.
 3. Planners understand that strategies need not be deliberate, they can emerge and form, as well as be formulated.
 4. Planners manage strategy—they are involved, responsive, sensitive, encouraging, have individual vision and are continuous leaders.
 5. Planners manage stability—they know the subject area, detect discontinuity, manage patterns and reconcile change and continuity.

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LEADERSHIP CONSIDERATIONS

- Who should be involved with the effort?
- Who else outside the organization should I talk to?
- What changes are occurring in your organization, in the state, nation or globe that might influence your plan?
- How will you communicate about the planning effort and final plan?
- What is your role as coordinator of the effort: a visionary, a doer, a meeting leader, a member, etc?

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STRUCTURAL ALTERNATIVES

- Do it alone and present to organization/guiding members
- Do it alone, ask for response and revise based on input
- Charter strategic planning team to lead effort
- Leader drafts plan for consideration
- Leader leads team based effort to draft plan
- Team prepares plan and presents to leader
- Find a consultant/facilitator to lead team through the effort
- Check with other leaders and institutions for their models

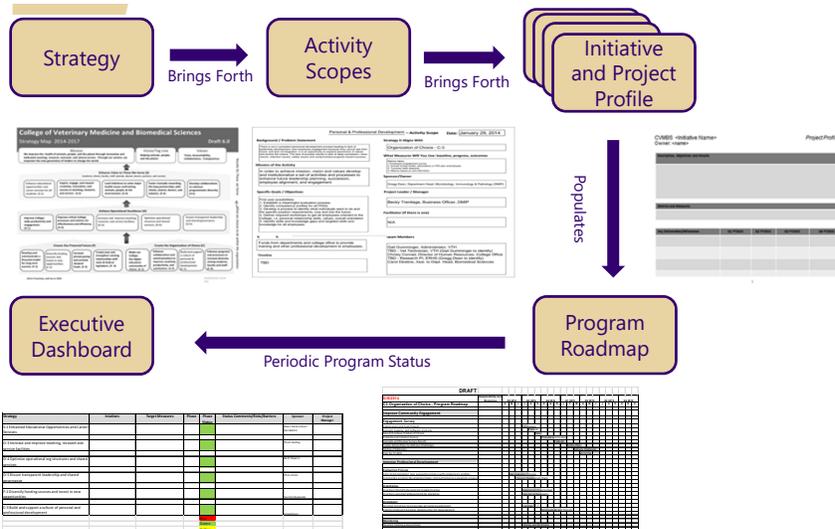
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ROLE OF STRATEGIC PLANNING PROJECT MANAGER

- Serve as point of contact for the leader, sponsor and team members (resources, process, conflict management)
- Regularly connect the leaders/sponsors with each other to share information and learning
- Set clear expectations for teams, taking lead from sponsor
- Assure strategic alignment of activities toward achievement
- Provide feedback and communications to team leaders and members
- Collect information and metrics and report on team progress
- Assist teams to prepare for updates
- Identify and provide training as needed for individuals, teams or all involved
- Assist team over hurdles/barriers

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PLANNING TO IMPLEMENTATION FLOW



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BALANCED SCORECARD STRATEGY

Structure of the Scorecard:

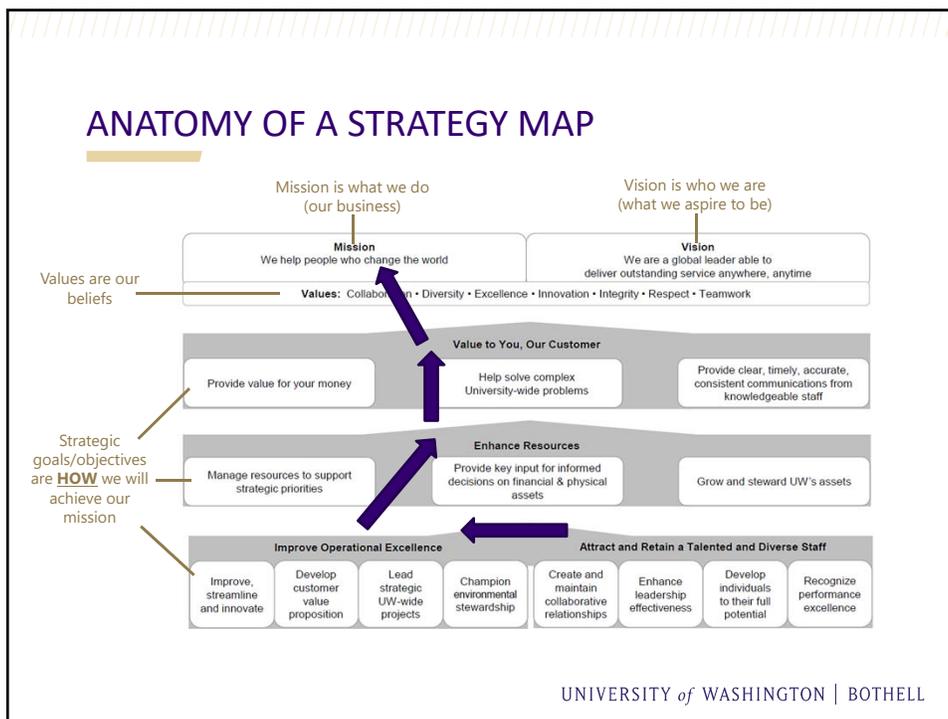
- Strategy is an organization's plan to look forward
- Strategic goals are foundation for achieving strategy
- Quadrants:
 - Financial
 - Customer
 - Internal Process
 - Learning and Growth
- Initiatives/Activities are the key action steps needed to achieve the strategic goals
- Illustrates patterns to examine past performance
- Measures are chosen to track success
- Targets are the level of performance needed

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GLOSSARY OF TERMS

- **Strategy Map** — one page visual representation of the mission, vision, values, strategic themes, and strategies. Normally a 3-5 year period. The map is dynamic and should illustrate how these goals in relation to each other will help achieve the mission, vision and values.
- **Mission** — the purpose of the organization (doesn't usually change).
- **Vision** — what the organization hopes to achieve (changes over time as vision is realized).
- **Value** — core beliefs of the organization, e.g. teamwork. A small set of 5-7 values people demonstrate in how they work. Some values may be those the organization wants to achieve and will work toward.
- **Strategic Theme** — a description of a set of strategies, e.g. customer focused, internal processes, assets, organizational capacity. See Balanced Scorecard Strategy slide on prior page. The themes can be named what makes sense to the organization.
- **Strategic Goals/Objectives** — future focused activity that will help drive the organization in meeting its mission and vision.
- **Actions/Initiatives** — not on the strategy map, but are activities or initiatives the organization will take in order to achieve the strategic goal. Often to-dos.
- **Activity Scope** — a one page visual (included later) that can be used to map out the actions needed to achieve a goal. Includes problem statement, activity's mission, objectives/set of to-do's, timeline, alignment with strategy, roles (sponsor, leader, facilitator, team members).

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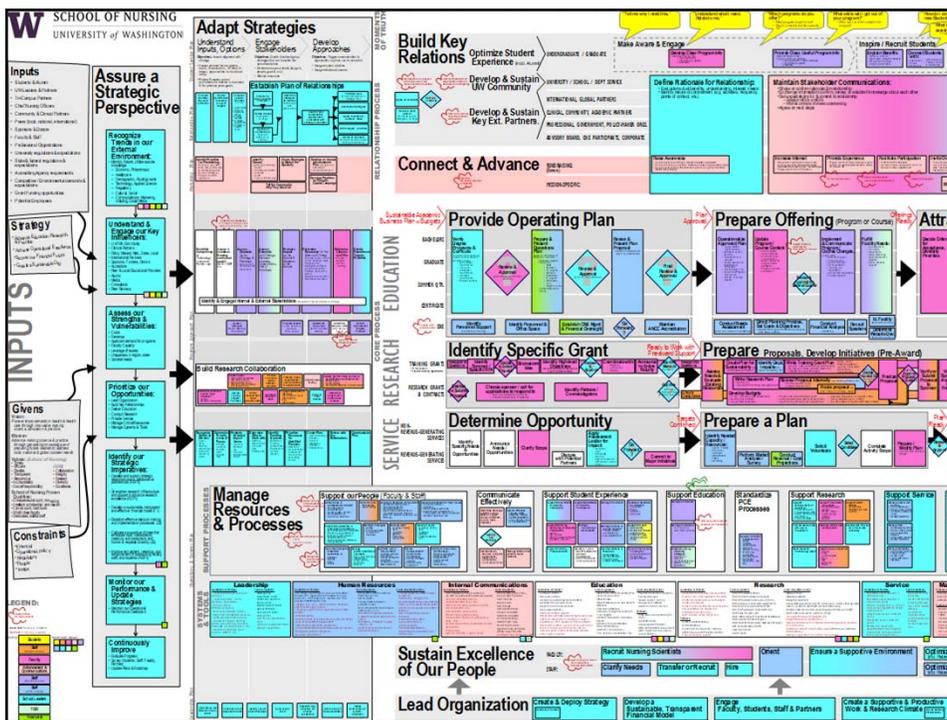
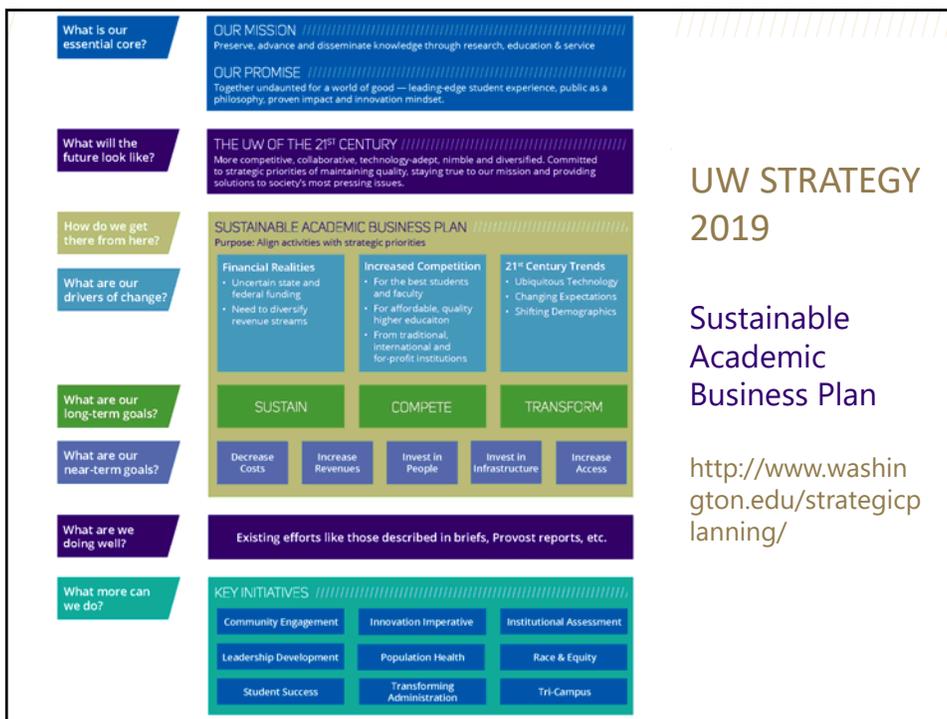


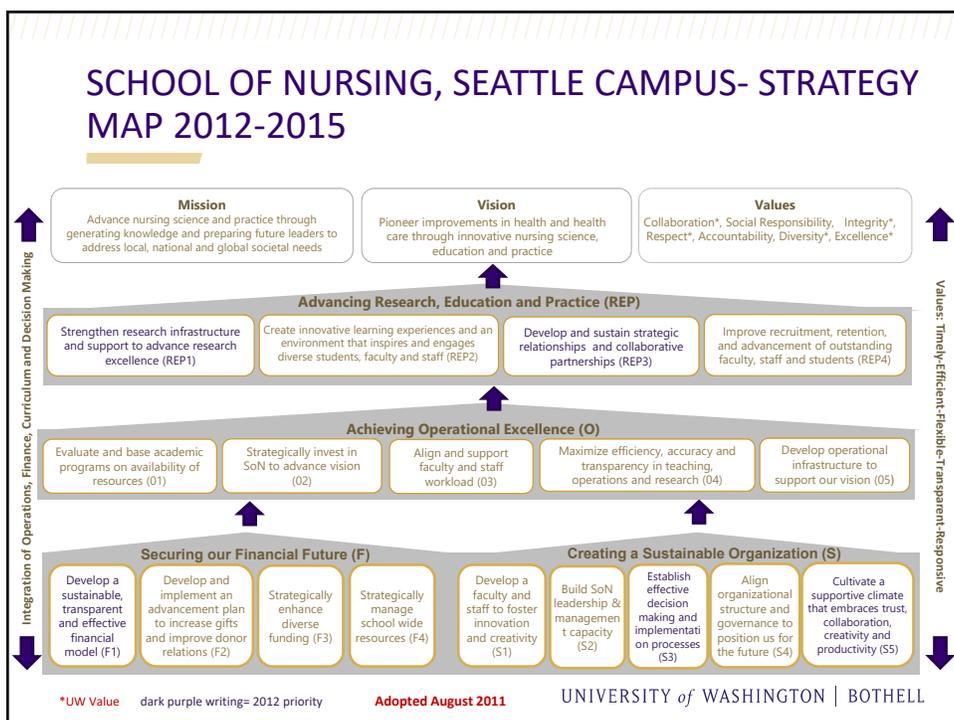
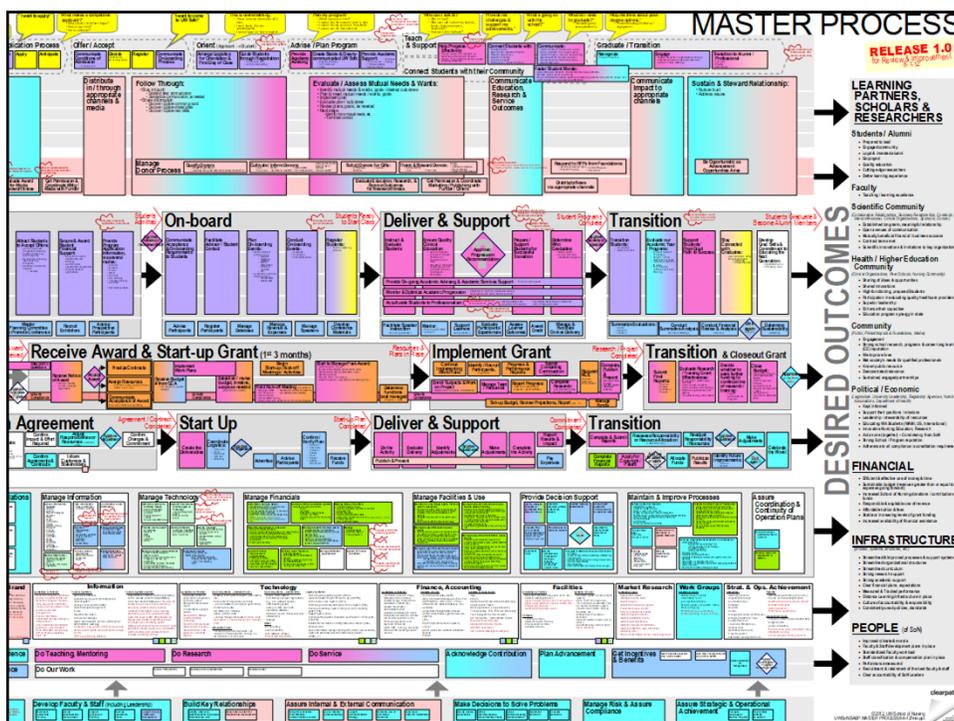
ORGANIZATION NAME: _____

STRATEGY MAP FOR 2017 - 2020

Mission	Vision	Values
Customer Focus		
Improving Internal Business Practices		Build Capacity
Securing Resources (Funding, Time, Space, Etc.)		

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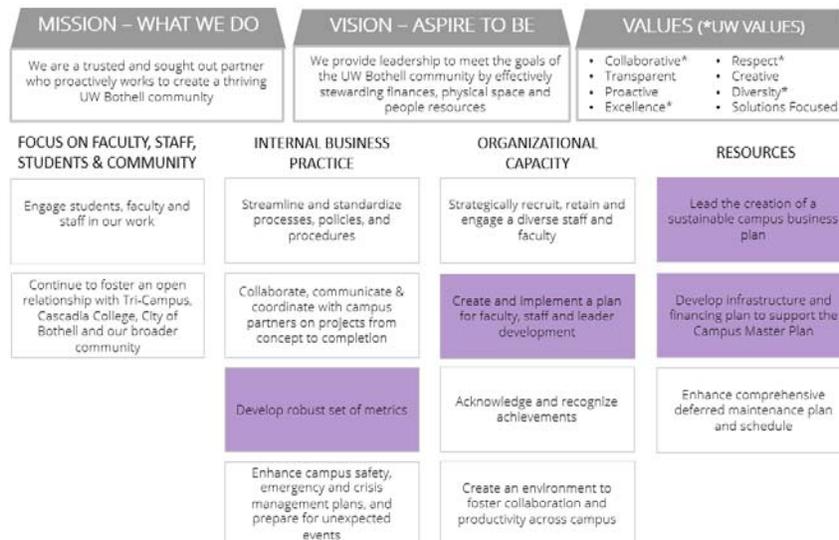
UW BOTHELL CHANCELLOR'S EXECUTIVE TEAM STRATEGY MAP FOR 2018-2021



Purple boxes are this year's priorities

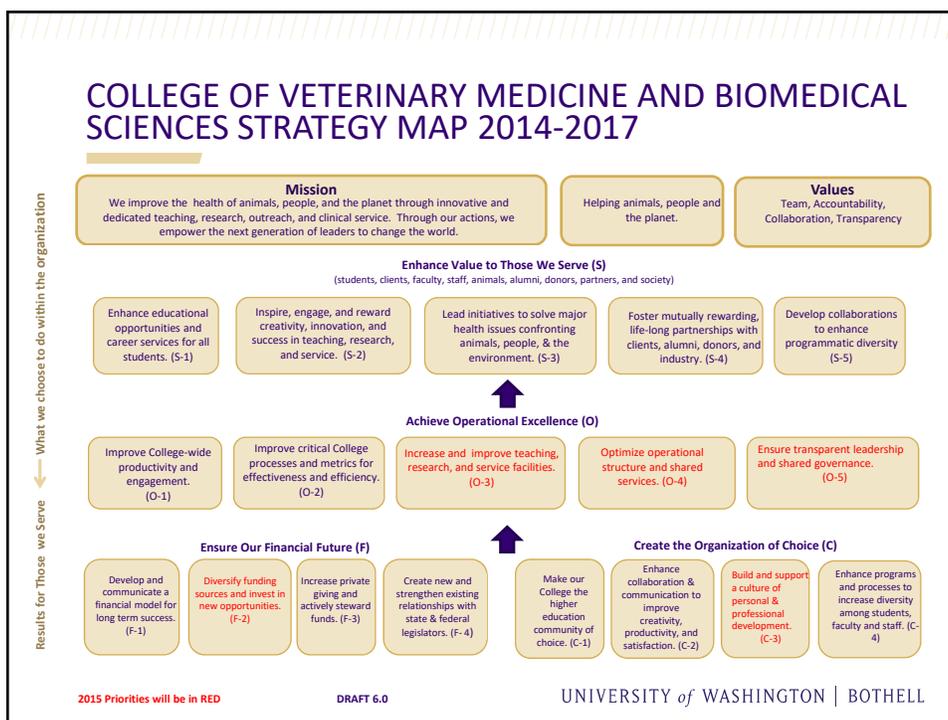
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UW BOTHELL ADMINISTRATION & PLANNING STRATEGY MAP FOR 2017-2020

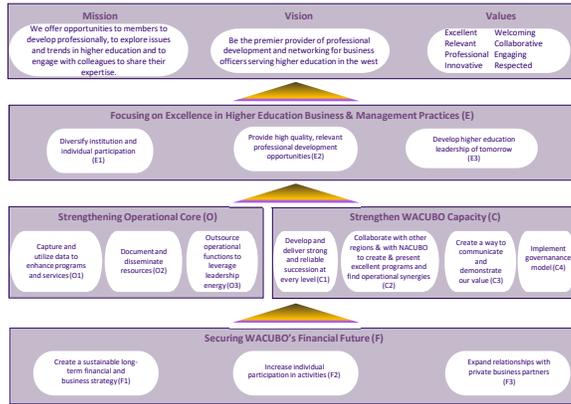


Purple boxes are this year's priorities

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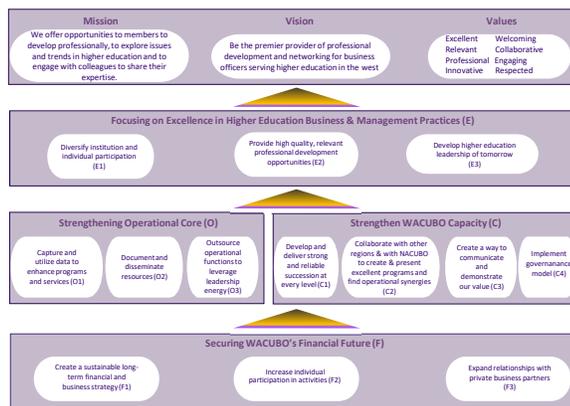


WACUBO CURRENT STRATEGY MAP



Adopted by WACUBO Board, May 2, 2014

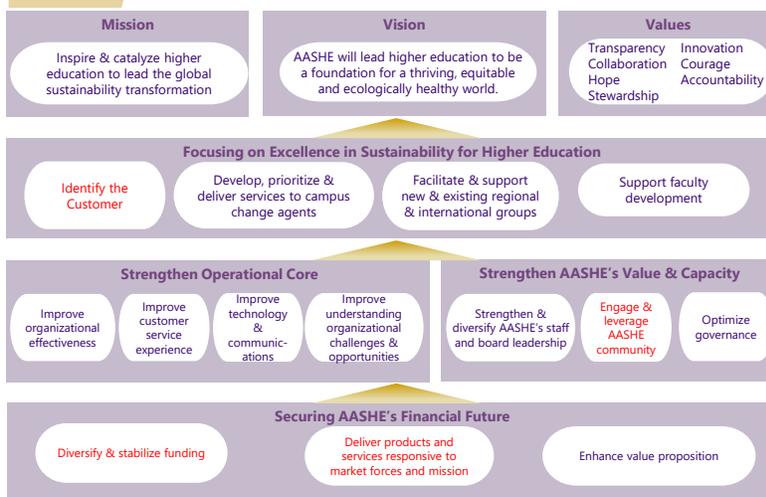
STRATEGY MAP: 2018-19 GOALS & OBJECTIVES



2018-19 GOALS/OBJECTIVES

- ❑ Financial & Organizational Sustainability (F1,F2,F3,O3)
- ❑ Diversity and Inclusion (E1)
- ❑ Building Reputation and Social Media Presence (C3,C2,E2,E3)
- ❑ Risk Management (C4)
- ❑ Monitoring Performance against Goals (O1)
- ❑ Orientation of New Board Members (C1)

AASHE STRATEGY MAP FOR 2014-2017



Note: Red is 2014 priority

Affirmed General Direction May 23, 2014, AASHE Board

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PROCESS TIMELINE



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STRATEGIC PLANNING TIMELINE EXAMPLE

- November 16:
 - Plan to plan: structure and participants
 - Begin planning meetings, draft pieces
- January – March 17:
 - Agree to priorities, assign leader
 - Agree to mission, vision, values, strategies, goals
- April – May 17:
 - Vetting and tweaking
 - Develop action plans
 - Discuss and roll out communications
- June 17:
 - Finalize and communicate plan

In Between Meetings:

- Small group meetings
- Wordsmith the documents
- Review drafts
- Draft action plans (who, what, how, resources)
- SWOT Analysis
- Develop Metrics

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Session two: Strategic Planning- SWOT, Mission, Vision, & Values

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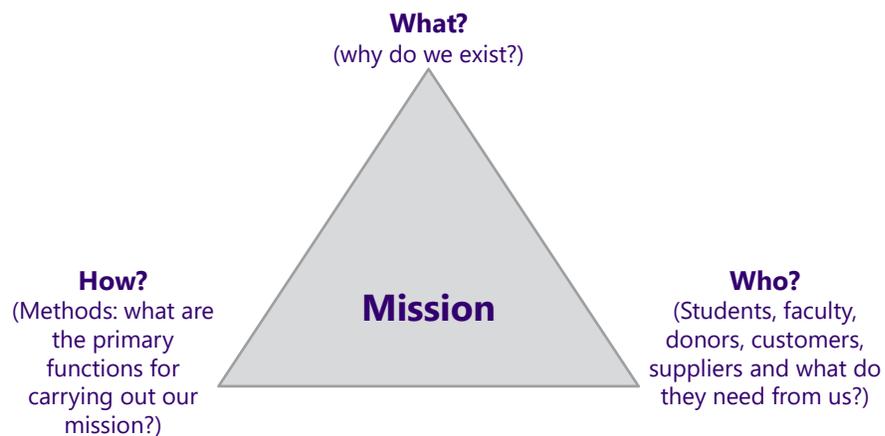


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MISSION BUILDING



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VISIONING

- Where do we want to be in 3+ years?
- What will be our stakeholder needs?
- This is an aspirational statement – something to work toward.
- Some groups have only one statement that includes mission, vision, and values.



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VALUES

- What are our organizational beliefs and principles?
- This often begins with discussion of personal values – what do individuals want to be known for, internally and externally. Then a shift to organizational values; with agreement to begin practicing and using them to help change the culture if the values are new to the organization.

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ORGANIZATIONAL VALUES EXERCISE

Below are twelve possible organizational values. Please rank them from one to twelve in the slots provided -- 1 being the most important to you organizationally, 12 being the least important to you organizationally.

- A. Positive image and organizational pride _____
- B. High expectations for performance _____
- C. Teamwork and communications _____
- D. Inspiring leadership _____
- E. Cost effectiveness and prosperity _____
- F. Dedication to the customer _____
- G. Concern for the community and environment _____
- H. Innovation and creative solutions _____
- I. Growth and professional opportunity _____
- J. Empowerment of employees _____
- K. Stability and security _____
- L. Completing jobs in time frames given _____

After you complete this, turn it in for compilation and discussion of the most important ones to adopt.

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SWOT ASSESSMENT MODEL

- Organizational assets, resources, people, culture, systems, partnerships, suppliers, etc.
 - Strengths
 - Weaknesses
- Marketplace, competitors, social trends, technology, regulatory environment, economic cycles
 - Opportunities
 - Threats
- Internal Assessment
- External Assessment (voice of the customer)



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SWOT ASSESSMENT MODEL

- Strengths
 - Those things that you do well, the high value or performance points
 - Strengths can be tangible: loyal customers, efficient distribution channels, very high quality products, excellent financial condition
 - Strengths can be intangible: good leadership, strategic insights, customer intelligence, solid reputation, highly skilled workforce
 - Often considered “Core Competencies” – best leverage points for growth without draining your resources
- Opportunities
 - Potential areas for growth and higher performance
 - External: marketplace, unhappy customers using your competitors, better economic conditions, alternative funding sources
 - Internal: classified as strengths
 - Timing may be important for capitalizing on opportunities

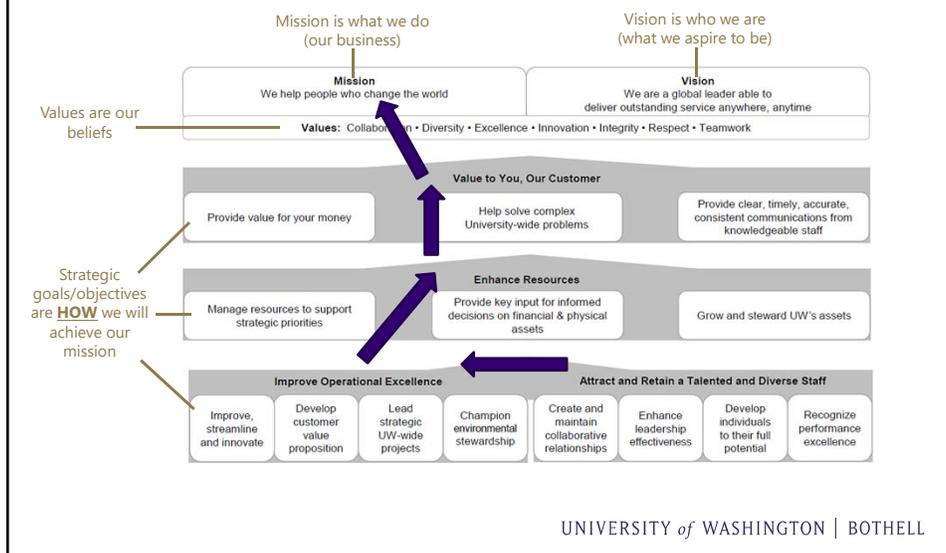
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SWOT ASSESSMENT MODEL

- Weaknesses
 - Those things that prevent you from doing what you really need to do
 - Since weaknesses are internal, they are within your control
 - Weaknesses include: bad leadership, unskilled workforce, insufficient resources, poor product quality, slow distribution and delivery channels, outdated technologies, lack of planning...
- Threats
 - Challenges confronting the organization, external in nature
 - Threats can be wide ranging – bad press coverage, shifts in consumer behavior, substitute products, new regulations...
 - It may be useful to classify or assign probabilities to threats
 - The more accurate you are identifying threats, the better position you are for dealing with the “sudden ripples” of change

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ANATOMY OF A STRATEGY MAP



STRATEGIC GOALS/PRIORITIES

- In what major directions will we focus our efforts to advance toward our vision? (customer, operational excellence, fiscal, organizational)
- Choose no more than 12, but prioritize for year 1 no more than 3-5

Ask:

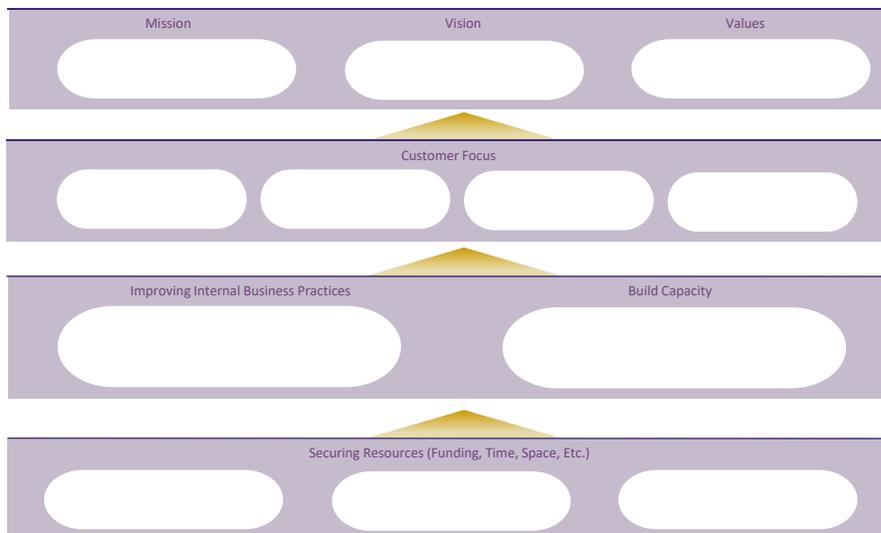
- Do our strategic priorities support those of the greater organization?
- With whom will we link with to accomplish these goals?

CREATING STRATEGIC GOALS

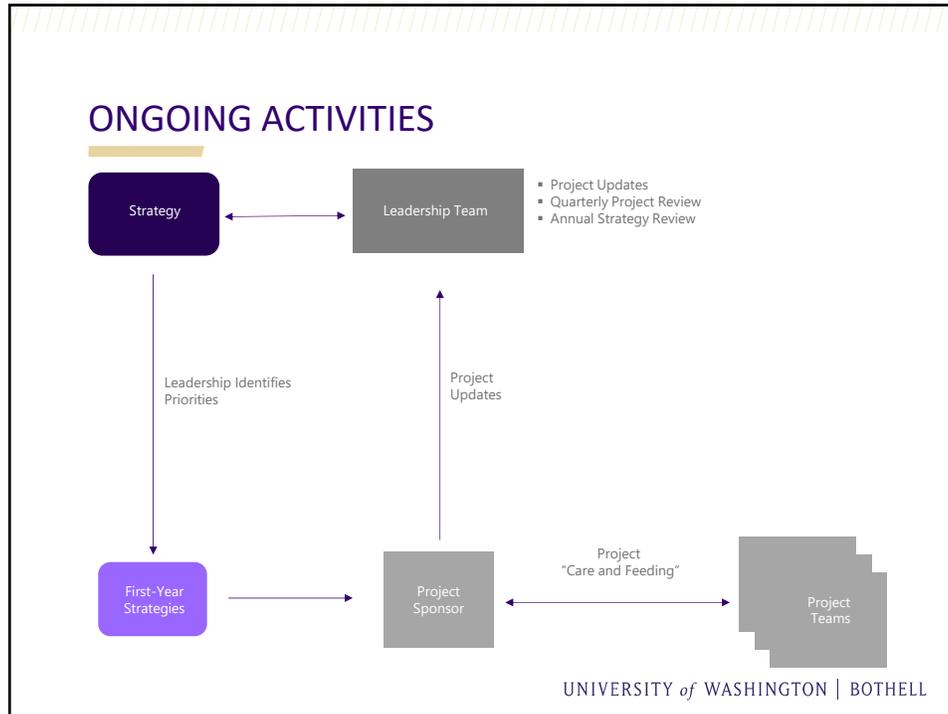
- Normally use one flip chart per quadrant
- Put ideas, at least one per quadrant, on a post it
 - Must start with an action work (e.g. develop, create, enhance) that's future focused
 - Not (e.g. maintain, continue)
 - Must be short to fit into a bubble
- Stick in the quadrant you think fits best
- Discuss together
- Choose no more than 12-14, balances between quadrants
- Name each quadrant

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STRATEGY MAP FOR 2019 - 2022



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CASE STUDY WORK ASSIGNMENT

- Get into teams
- Review the case study material
- Do a SWOT analysis
- Develop the mission, vision and values
- Construct your strategy map
 - Mission, Vision Values
 - Theme names for quadrants (customer, operations, staff capacity, resources)
- Strategic goals (no more than 12)
- Pick one – three to focus on for year one



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ROLE OF STRATEGIC PLANNING PROJECT MANAGER

- Serve as point of contact for the leader, sponsor and team members (resources, process, conflict management)
- Regularly connect the leaders/sponsors with each other to share information and learning
- Set clear expectations for teams, taking lead from sponsor
- Assure strategic alignment of activities toward achievement
- Provide feedback and communications to team leaders and members
- Collect information and metrics and report on team progress
- Assist teams to prepare for updates
- Identify and provide training as needed for individuals, teams or all involved
- Assist team over hurdles/barriers

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Session three: Action and Lean Process Improvement

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AGENDA

- Session One: Strategy Planning Overview
- Session Two: SWOT, Mission, Vision, Values, Strategy Mapping
- **Session Three: Action Planning and Lean Process Improvement**
- Session Four: Demonstrating Knowledge
- Session Five: Leading Change and Course Summary

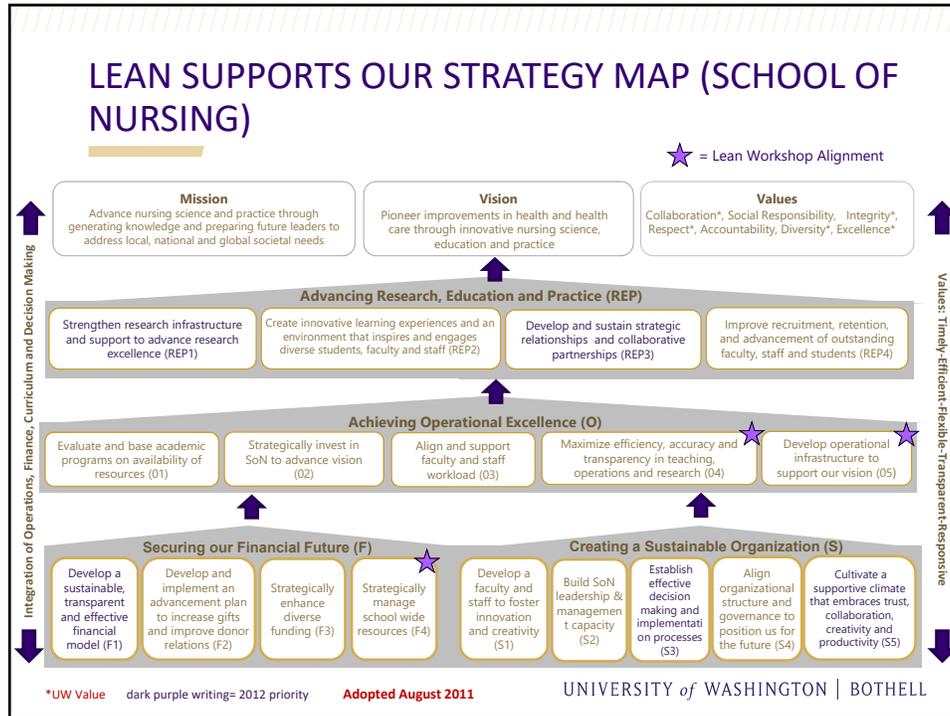


LEAN:

A METHODOLOGY FOR ACHIEVING GOALS, IMPROVING PROCESSES AND CHANGING THE CULTURE



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WHAT IS LEAN?

LEAN is “a systematic approach to identifying and eliminating waste...” which includes:

- Identify current state
- Envision future vision
- Rapid process improvements
- Customer involvement

LEAN engages staff:

- To identify and solve problems
- To help achieve the strategic plan

LEAN encourages leaders:

- To trust and respect staff to do so



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WHY LEAN?

LEAN helps leaders and staff to become more:

- Customer sensitive
- Nimble
- Efficient

LEAN thinking and actions help us to:

- Achieve our strategic plan
- Build a common culture – those closest to the work constantly learning how to make that work better
- Improve our management processes of observation, experimentation and speed
- Become better problem finders and solvers
- Develop transferable job skills

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WHAT IS UNIQUE ABOUT LEAN?

- “Wing-to-wing” improvements involve customers, staff, process partners and suppliers
- Faster rate of change
- Customers define what’s valuable
- Aggressive improvement goals (often 50%)
- A continuous improvement is a way of life

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PRINCIPLES OF LEAN

1. Customer defines value
2. Produce at the rate of customer demand “pull”
3. Eliminate waste
4. Focus on work flow and value streams
5. Pursue continuous improvement

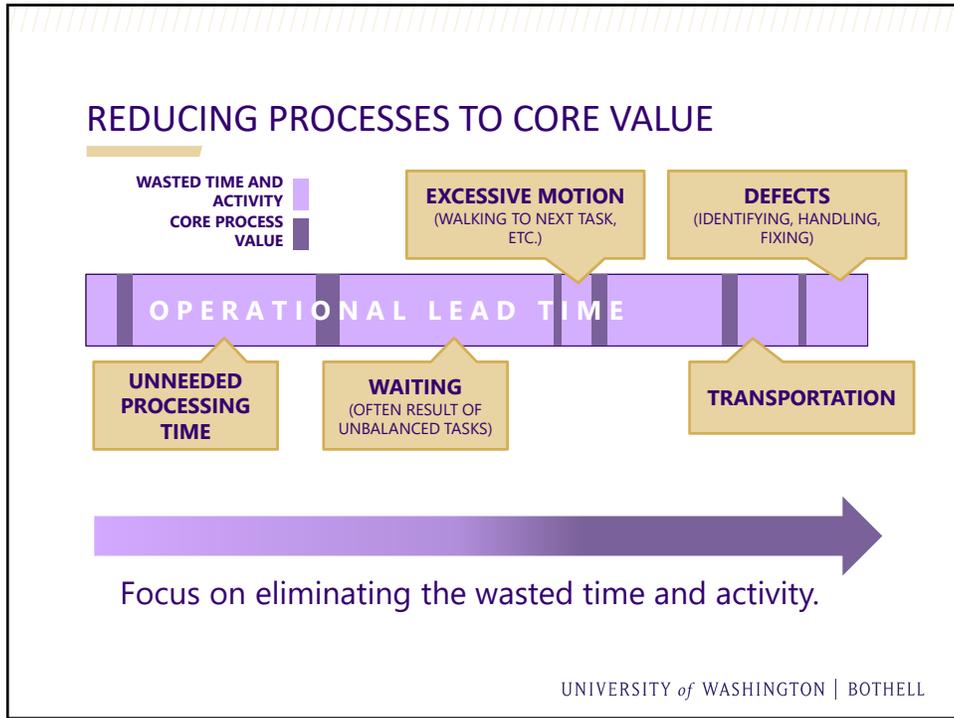


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ADDITIONAL LEAN CONCEPTS

1. Welcome problems (“Having no problem is the problem”)
2. Build meaning from data (go see what’s happening, “*gemba*”)
3. Focus on the process, not people
4. Develop people and teams
5. Learn by doing

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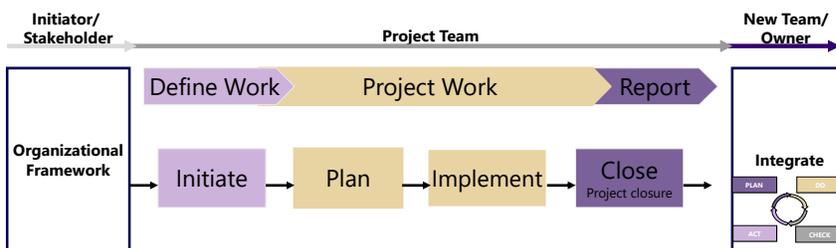


WHAT IS A KAIZEN EVENT?

- **Kaizen:** a Japanese term that means “change for the better” through continuous, incremental improvement
- **Kaizen Event/Workshop:** an event or workshop that teaches how to identify waste in a given process and to make rapid improvements to a process
- **1-3 Day Workshop:**
 - Team includes project leader, facilitator, staff members, customers/process partners
 - Identify current state identify issues, envision future state, identify Kaizen Projects
- **30, 60 and 90-Day Improvement Report Outs** to leaders/stakeholders/ interested parties using visual board

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PROJECT LIFECYCLE



- **Organizational Framework** – identify project and align with strategy map, identify and provide resources, project scheduling, prioritizing, direction-setting, issue resolution, milestone reviews
- **Initiate** – develop business case and project plan/charter, including role(s) of sponsor(s), owner(s), define problem/opportunity with supporting data, participants, success measure(s), and scope (boundaries and parameters)
- **Plan** – develop execution steps, timeline, dependencies, milestone dates, plans for risk and risk mitigation, plans for communications and for training
- **Implement** – do the work defined in plans
- **Control** – hold milestone meetings with sponsors, produce reports on performance and success measure(s), identify issues, resolutions, and management (e.g. scope management)
- **Close** – report results, determine ownership and integration into ongoing work of all affected work units, evaluate the project, summarize lessons learned, and document the process and materials developed
- **Integrate** – implement agreements, identify ongoing roles/responsibilities, create ongoing operational measures and dashboard reporting cycles, provide training, standardize processes, and continually improve

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ACTIVITY SCOPE (WORK CHARTER)	
PROJECT NAME:	DATE:
PROJECT DESCRIPTION:	
PROJECT START DATE:	PROJECT END DATE:
PROBLEM TO SOLVE/OBJECTIVE:	DELIVERABLES AND TIMELINES:
TEAM MEMBER NAMES	
EXECUTIVE SPONSOR(S):	TEAM MEMBERS:
PROJECT LEADER(S):	FACILITATOR(S):
REVIEW TEAM IF NEEDED:	

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EXAMPLE ACTIVITY SCOPE (WORK CHARTER)	
PROJECT NAME: Classroom Scheduling Improvements	DATE: Updated 8/29/15
PROJECT DESCRIPTION: The goal of this project is to institute new classroom scheduling practices that will provide a variety of benefits to the UW community. Three new practices will be implemented: increasing the instructional week to 50 hours (from the current 40), requiring that requests for general-assignment classrooms be distributed evenly throughout an instructional day, and requiring that class offering conform to specific day/time combinations (so-called "block scheduling").	
PROJECT START DATE: November, 2014	PROJECT END DATE: November, 2016
PROBLEM TO SOLVE/OBJECTIVE: In 2013-14 academic year an extensive review of learning spaces on the UW Seattle campus was performed, and a series of recommendations to improve classroom scheduling were identified. The problems created by current scheduling practices include: <ul style="list-style-type: none"> • In Autumn 2015 roughly 20% (approximately 800) of classroom requests were not met. Unmet requests significantly disrupt academic planning and course scheduling. To meet peak demand, 100 new classrooms would need to be added to current inventory, more than a 30% increase. • From 9:30 am to 2:30 pm nearly 100% of classrooms are in use. As such, there is no opportunity to renovate or repair classrooms during academic quarters. A benchmark or industry standard for classroom utilization is 70%. • For many courses there is a significant mismatch between enrollment and classroom capacity. The objective of this project is to explore the scheduling recommendations, and implement those that will significantly impact classroom use.	DELIVERABLES, METRICS AND TIMELINES: <ul style="list-style-type: none"> • June 2015 (done) - Implementation Committee to explore recommendations (including data modeling) and present a scheduling plan to the Governance Committee. • Through Jan 2015 - Governance Committee to review plan, and gauge impacts and mitigation through communication with key stakeholders. • April 2015- Final recommendations to Provost. April 1, 2015. • Nov. 2016 - New scheduling processes used for the 2017-2018 academic year. Metrics that will be employed to gauge the efficacy of this effort: <ul style="list-style-type: none"> • Reduction in the number of unassigned class requests. • Reduction in the time to finalize the time schedule for a given academic quarter. • Better compliance with the "70/70" rule: average of 70% of classrooms used at an occupancy of 70%. • Better match between course enrollment and classroom capacity.
TEAM MEMBER NAMES	
Executive Sponsor(s): Jerry Baldasty, Interim Provost	Team Members: The Scheduling Governance and Implementation Committees Data Subcommittee: Roberta Hopkins, Diane Machatka, Philip Reid, Nancy Salts, and Matt Winslow.
Project Leader(s): Bruce Balick, Chair of the Scheduling Governance Committee Philip Reid, Chair of the Scheduling Implementation Committee	Facilitator(s):
Review Team if needed:	

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ALIGNING ACTIVITIES TO STRATEGIES (NAME, STRATEGY CODE, ACTIVITIES) - EXAMPLE

Adam: V3 V2 C4 C3 C1 C2

- Snapshots
- Program fliers/visual communications
- Event support fliers

Elise: V1 R4 V4

- CAP communications – working with students
- CAP policy work
- Green seed fund
- Sustainability in the curriculum

Graham: R3 R4 C2

- CSF
- Green Seed Fund

Jennifer: V1 V3 V4 O3 C2 C3

- Web
- Green Office
- Social Media

Claudia: R1 R4 O1 O3 C2

- Paper reduction
- Administration
- ESC support
- Communications
- Reporting

Katya: O3 O1 V1

- Program support
- Dashboard updates
- Metrics

Alex: V1 V3 O1 O3 C1 C3 R1 R4

- Communication strategy
- Messaging – tell story
- Promotion
- Senior leadership talking points

Dan: V1 V3 C2 C3 R3

- Website support

Aubrey: V1 V2 V3 O1 O2 O3 C1 C2 C3 R3

- Green lab
- Student project oversight
- Metrics support
- Presentations

Ruth: R1 V3 V4 O2 O3 C2 C4 R2 R4

- Politics/negotiations
- CAP policy
- Secure resources/funding
- Senior leadership communications

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WHAT IS A KAIZEN EVENT?

▪ **Visual map of work flow:**

- From beginning to end, including the customer perspective (wing-to-wing)
- The steps in the process including time it takes to do it

▪ **A tool to:**

- Document the current process
- Point to problems
- Focus direction

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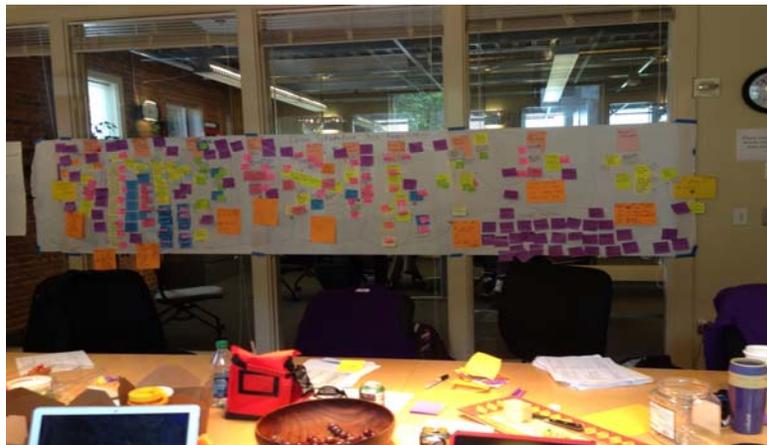
IT ALL STARTS WITH GETTING THE MESS ON THE WALL...

- Chartered cross-functional teams participate in a launch
- They learn to value-stream map, identify pain points, see waste, "own" the problems, and envision a future state
- More important than tools, staff are empowered to make improvements that will make their work-lives better, together, with support from leadership



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DOCUMENTING PROCESSES & STANDARDIZING



<http://www.youtube.com/watch?v=EKllov5Ji2o&sns=em>

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SET AN AUDACIOUS GOAL

- Anything less than 50% improvement encourages just working harder
- Tweaks aren't worth the time you're spending here
- An impossible goal requires that you dismantle a (often times dysfunctional) process
- A big goal serves as "true north" for where your organization must head

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FOLLOWED BY A 90-DAY IMPROVEMENT CYCLE: "LEARNING LAB" OF SORTS



Along the way, leaders and team members discover each others' untapped talents, creativity, and energy.

Teams learn and experience:

- Visual management
- Weekly rhythm
- What it means to be in charge of change
- Seeing gaps
- Problem solving through ideas



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LEAN EVENT 30 – 90 DAY VISUAL BOARD

- Illustrates progress toward goals, shows accomplishments, roadblocks, cross-pollination, metrics
- Also shows ideas, kudos, etc.
- It changes weekly, with monthly check ins with leadership and others, or whenever someone wants to know



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KANBAN BOARD (WORKFLOW)

Ideas	Ready	Doing	Done
<ul style="list-style-type: none"> • Take a vacation • In-grade salary increases for two staff • 5 S paper in Gerb office 	<ul style="list-style-type: none"> • ISSP materials 	<ul style="list-style-type: none"> • AASHE ED search • BMI presentation • Tacoma Lean curriculum • Lean annual calendar 	<ul style="list-style-type: none"> • NCCI presentation • Flights for AASHE/ISSP • ESS retreat

This can be a combination of everything, those just you do, what your team is doing, etc. Deadlines can be put on along with who is responsible. Make it work for you!

This should be visible – handwritten with post-its and moved as tasks progress. Can also use kanbanflow.com (free) or trello.com (free and app)

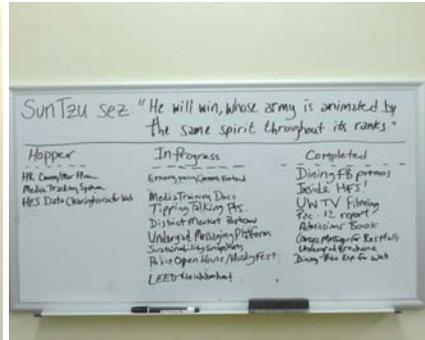
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KANBAN BOARDS

- Tracks flow of work to meet each person's unique work and value stream. Work aligns with the area's visual control board, which aligns with strategic goals.



Assistant Director's board



Communications Manager's Board

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UNIT KANBAN BOARD



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CASE STUDY ASSIGNMENT

- Using the Activity Scope Document, choose one of your strategic priorities to map out for an action plan
- If time, experiment with a Kanban (work flow) board – ideas, ready, doing, done



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Session four: Demonstrating Knowledge

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AGENDA

- Session One: Strategy Planning Overview
- Session Two: SWOT, Mission, Vision, Values, Strategy Mapping
- Session Three: Action Planning and Lean Process Improvement
- **Session Four: Demonstrating Knowledge**
- Session Five: Leading Change and Course Summary

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REPORT OUTS

- Student
- Administrative
- Academic
- Auxiliary



You will have 10 - 15 minutes each, plus questions and feedback.

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PRESENT ON, 10 MINUTES

- Team members
- Case facts
- Highlight SWOT
- Review Strategy Map
- Describe Action Plan
- Talk about how your team functioned

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FEEDBACK IS A GIFT!

Comments/feedback/questions:

1. Is the vision compelling?
2. Are the goals strategic? (not tactical)
3. Is there a clear action plan/activity scope?

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Session five: Leading Change and Course Summary

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AGENDA

- Session One: Strategy Planning Overview
- Session Two: SWOT, Mission, Vision, Values, Strategy Mapping
- Session Three: Action Planning and Lean Process Improvement
- Session Four: Demonstrating Knowledge
- **Session Five: Leading Change and Course Summary**



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STRATEGIC PLANNING IMPLEMENTATION

- Lead the effort
- Collect data, but not too much
- Engage people, but the right ones and expect faculty (and others) to be critical
- Communicate, in many varied and frequent ways; have a plan from the beginning
- Make sure all subordinate plans connect to the overall
- Resources, make sure you have them to achieve the plan
- Content, it needs to be strategic and distinctive
- Learn to be a good politician
- Choose action over perfection

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LESSONS LEARNED ABOUT IMPLEMENTATION

1. Always have a designated responsible party
2. Reward the "doers"
3. Provide support to be "accountable"
4. Be tolerant of failure
5. Clarify decision rules
6. Small wins matter
7. Don't micromanage
8. Get people involved in creating their own goals
9. Middle management is key to implementation
10. Focus on results, not activity



Pat Sanaghan, Academic Impression, December

2014

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A NOTE ABOUT FACULTY

Faculty:

- Love learning, research, discovery, etc.
- Are driven by need for grants/research
- Enjoy academic freedom
- Are used to critique
- Gain success from their colleagues in their distinct discipline

Can be frustrated by:

- Bureaucratic rules
- Not being able to use research dollars as they wish
- Pressure to get promoted, get tenure, etc.
- Teaching workload
- Service (committees) expectations

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A NOTE ABOUT STAFF

Staff:

- Want to understand the goals of the organization and how they fit
- Want to support the organization
- Are attuned to compliance requirements
- Are often generalists
- Know how to and get things done
- Are structures in their work and work expectations
- Understand need for process improvement and standardization

Can be frustrated by:

- People not following or carding about the rules
- Last minute requests
- Too much work
- Directness or perceived lack of respect
- Lack of recognition for good work
- Unrealistic expectations
- Not being valued as a partner

Adapted in part from Susan Christy, Ph. D.

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A NOTE ABOUT STUDENTS

Students:

- Are fresh, eager, idealistic
- Are inexperienced
- Are smart
- Want some direction
- Are thoughtful
- Have great ideas

Can be frustrated by:

- Being kept out of planning
- Bureaucracy
- Being told "no"
- Time it takes

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EIGHT STAGE CHANGES PROCESS

Note: Kotter says the sequence is important!

- Establish a sense of urgency
- Create a guiding coalition
- Develop a vision and strategy
- Communicate your change vision
- Empower broad-based action
- Generate short term wins
- Consolidate gains and produce more change
- Anchor new approaches in the culture

- John Kotter

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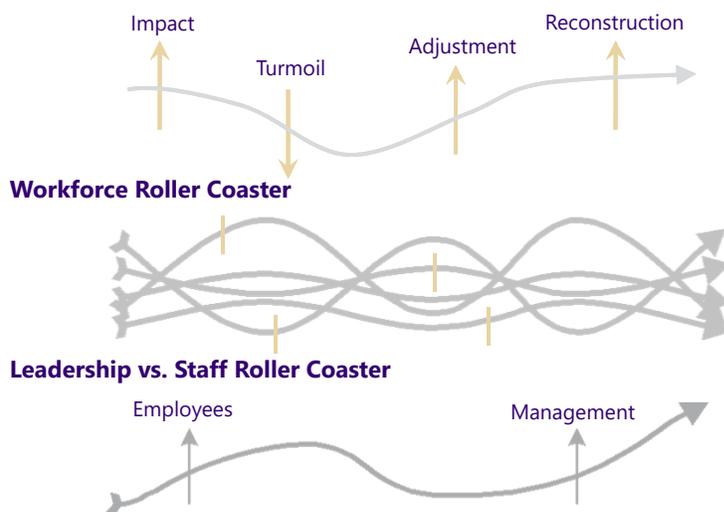
MYTHS AND REALITIES OF CHANGE

Myth	Reality
This will go away	Change is here to stay
It will help if I get upset about this	Controlling your emotions increases your control over the situation
Top management knows a lot more than they are telling	The odds are that higher management is being as open and straightforward as the situation permits
Management doesn't care about us	Management has to make some tough decisions, and it's impossible to keep everyone happy
I'm not in a position to make a difference	You're either part of the solution, or part of the problem
Top management is supposed to make these changes work	If you work here, this is your plan
They don't know what they're doing	Top managers have a pretty good idea of what they're doing, but can't do it without running into problems or making some mistakes
The changes weren't really necessary	What's necessary now is to make the changes work

- Pritchett and Pound

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ROLLER COASTERS OF CHANGE



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THREE PHASES OF TRANSITION

Transitions **Begin** with **Endings**

- Of some relationships
- Of some job duties
- Of some expectations

What are some of the things you need to let go of?

- *William Bridges*

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ELEMENTS OF THE NEUTRAL ZONE

- | | |
|--|--|
| ▪ Nothing works well | ▪ Priorities confused |
| ▪ A feeling of being nowhere between two somewhere | ▪ Information miscommunicated |
| ▪ Anxiety rises and motivations falls | ▪ People become polarized – some rush ahead while some go backward |
| ▪ Feeling disoriented | ▪ Discord rises |
| ▪ Becoming self-protective | ▪ Some creativity emerges |
| ▪ People often miss more time from work | |
| ▪ Feeling of overload | |

- *William Bridges*

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“It’s not so much that we’re afraid of change, or so in love with the old ways, but it’s that place in between we fear, it’s like being in between trapezes. It’s Linus when his blanket is in the dryer. There’s nothing to hold on to.”

- Marilyn Ferguson

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WHY IS CHANGE DENIED AND RESISTED?

Resistance increases when...

1. The purpose of the change is not made clear
2. The need for change is not understood
3. Communication regarding the change is poor
4. People who will be involved with the change are not included in planning
5. There are no rewards
6. Key people are not seen as really supporting the change
7. People perceive a negative impact on their social relations
8. Change is introduced too slowly or quickly
9. Habit patterns are ignored
10. Key job duties are exchanged
11. Feelings of failure exist
12. There is a tendency to seek security in the past
13. There is a lack of confidence in the outcome of change
14. Too much pressure exists
15. Vested interests are involved
16. The status quo cant be reestablished if the change proves unacceptable
17. People believe the change will reflect negatively on their past performances
18. Poor behavior on the part of others is tolerated during the change process
19. The change process is not open to input or critique
20. Decisions are passed down hierarchically and therefore some people have much information and others have little
21. The timing for the change is bad
22. One change means many changes
23. People want to know what the outcome will be before the change occurs
24. Behavioral change usually comes in small steps

- Pritchett and Pound

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MAKING CHANGE HAPPEN: LEADER'S ROLE

What you need to know:

- Why you are driving this change and your feelings about it/commitment to it
- That change won't work without people (even if you wish it were otherwise)
- How this change affects other changes
- The benefits to this change (short, long term) – focus on who you serve
- The risks of change
- When to push and when to hold back a bit

Personal behaviors:

- Listen to the pain that is caused by the pending change(s) and throughout the change process
- Connect personally to others, show your vulnerability
- Be courageous and persistent; champion, inspire
- Be involved and accessible

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MAKING CHANGE HAPPEN: LEADER'S ROLE

What you need to do:

- Package and promote the change, reinforce it over and over and stress what's in it for them (WIIFM)
- Plan to change process and timing well – ask for help if this isn't your strength
- Communicate over and over: share the context and problem, the process and how decisions will be made and communicated
- Involve and engage those affected – encourage ownership for change, doing the work, generating ideas and questions
- Set measures of baseline, progress and outcomes
- Recognize progress – even little things

What to consider:

- Involving a facilitator – sometimes the smartest thing you can do, so you can participate
- How to create new leaders, new leadership opportunities
- Doing a risk analysis/assessment

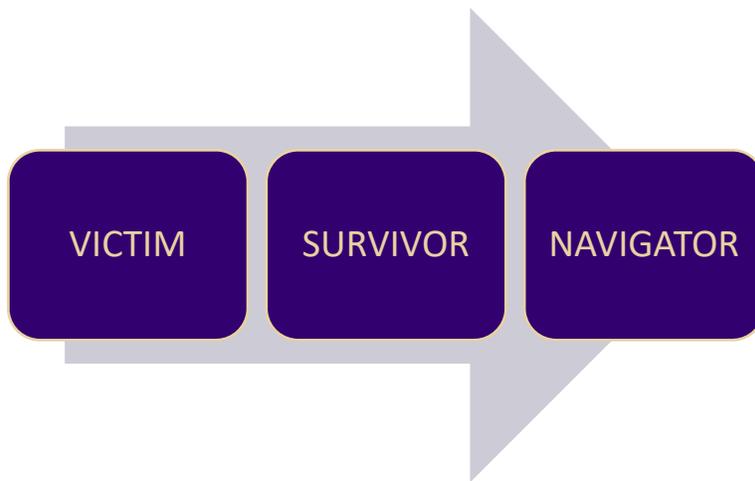
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SUCCESS FACTORS IN LEADING EFFECTIVE CHANGE AND STRATEGIC PLANNING IMPLEMENTATION

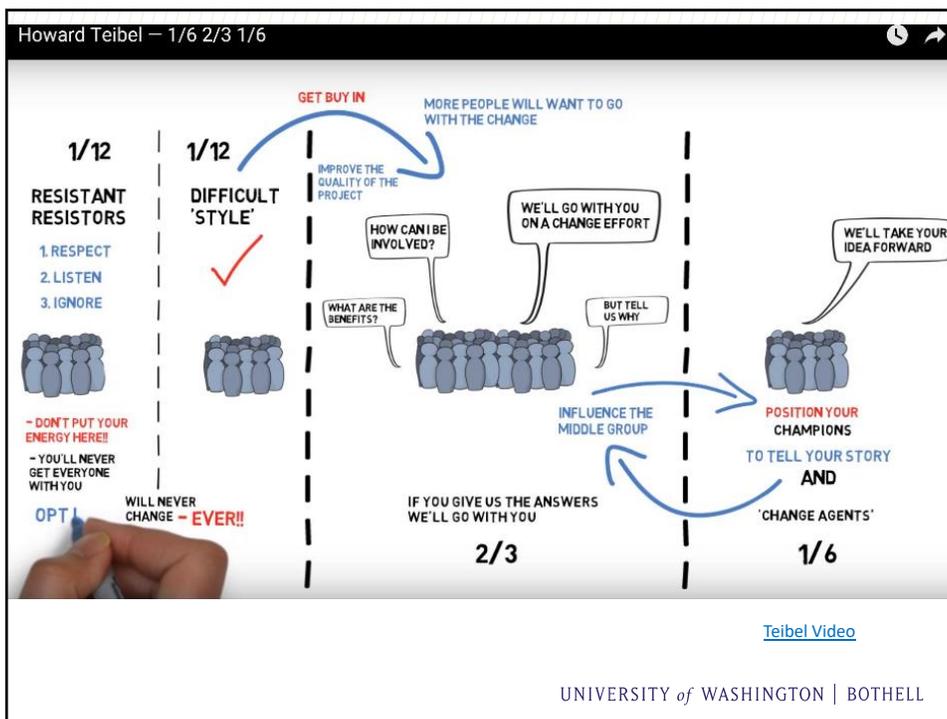
1. Embrace it
 2. Take initiative and try different things/take risks
 3. Follow through/make things happen
 4. Be persistent
 5. Be patient
 6. Reflect/adapt/be flexible
 7. Try to find some humor
 8. Involve the right people/build teams
 9. Communicate, communicate, communicate
 10. Measure processes
 11. Build allies
 12. Focus on customer needs
 13. Focus on process improvement
 14. Choose your battles
 15. Treat yourself well
- Ruth Johnston, Ph.D.

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PERSONAL RESPONSES TO CHANGE



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THREE CONDITIONS OF SUCCESSFUL CHANGE

- Valid Information – good communication going and coming to all levels of employees
- Informed choice – having the opportunity for all levels of people to have some choice about the new plans and changes
- Internal commitment – to have any change be successful all people must be committed to the course of action. There will be varying degrees of commitment, of course, but to be truly successful all people need to be committed to the general direction

WHERE DO WE START?

Focus on type 1 changes and prepare for type 2 changes

- Type 1: Control
 - We have the information, expertise, resources and authority necessary to manage the change.
- Type 2: Influence
 - We do not have full control, but can influence the outcome, with assistance.
- Type 3: Neither
 - We have neither control nor influence, and should not take on this change.



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COACHING SKILLS DURING CHANGE

- **Acknowledge the past**
- **Be courageous, empower yourself**
- **Take charge: management by committee won't work**
- **Be persuasive**
- **Set a clear agenda**
 - Create temporary policies and procedures
 - Do it quickly
 - Do it clearly
 - Be definitive
 - Include input of your key employees
 - Communicate

Focus on hard results

- Trust will be down
- Morale will be down
- Loyalty will be down
- Stress will be up

Re-recruit the keepers

- They are your cornerstones
- Make them feel important
- Capture their spirit
- Stabilize the group

Carve out new roles and responsibilities

- Be detailed
- Try not to have overlap right now
- Cut out duties where possible
- Keep track of performance

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COACHING SKILLS DURING CHANGE

- Deal with conflict
 - Expect old issues to surface
 - Set up transition monitoring team
 - Show urgency for change
 - Demonstrate your energy, drive and passion
 - Be a good role model
 - Keep reasons for change on peoples' minds
 - Tighten discipline
 - Set high standards
 - Be tightly organized
 - Be clear and explicit
 - Define criteria
 - Expect to be challenged
 - Deal with poor performers
 - Give psychological boosts
 - Words of encouragement
 - Compliments
 - Give psychological boosts (cont.)
 - Develop recognition programs
 - Be empathetic
 - Say thank you
 - Show personal interest
 - LISTEN
 - Show you care
 - Communicate
 - Give constant updates of all kinds
 - Repeat all communications
 - Make sure issues are aired
 - Invite argument and allow conflict
 - Keep a high profile
 - Create a shared vision
 - Balance the task (what) with the process (how)
 - Eliminate fear
 - Play angel's advocate *- Pritchett and Pound*
- UNIVERSITY of WASHINGTON | BOTHELL

COMMUNICATING IS IMPORTANT

- Be clear and articulate the outcomes (not tasks)
 - Why, why now?
 - What will it mean?
 - How will we measure our progress?
 - How does this link to other things we are already doing?
- Model change
 - Allocate time, energy, priority
 - Discuss at leader meetings
- HBR – “How to communicate during organizational change,”
June 2017, Elsbeth Johnson

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TAKE CARE OF YOU: WAYS TO REDUCE STRESS

1. Do physical exercise, at least thirty minutes three times a week.
2. Learn relaxation techniques.
3. Cut down on caffeine.
4. Eat right.
5. Meditate.
6. Develop better time management.
7. Play, have fun, recharge.
8. Get plenty of sleep.
9. Smile more. Laugh.
10. Count your blessings... make thankfulness a habit.
11. Say nice things when you talk to yourself.
12. Personal goals. Give yourself a sense of purpose.
13. Forgive. Grudges are too heavy to carry around.
14. Simplify.
15. Practice optimism.
16. Take breaks and lunches!

What else can/do you do?

- Adapted from Pritchett and Pound

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SUCCESS FACTORS IN LEADING EFFECTIVE CHANGE AND STRATEGIC PLANNING IMPLEMENTATION

1. Embrace it
2. Take initiative and try different things/take risks
3. Follow through/make things happen
4. Be persistent
5. Be patient
6. Reflect/adapt/be flexible
7. Try to find some humor
8. Involve the right people/build teams
9. Communicate, communicate, communicate
10. Measure processes
11. Build allies
12. Focus on customer needs
13. Focus on process improvement
14. Choose your battles
15. Treat yourself well

- Ruth Johnston, Ph.D.

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STRATEGIC PLANNING SUMMARY

- Is future focused
- Is leadership driven
- Provides for a high level of organizational involvement
- Allows contention within the broad framework of the organization's goals
- Creates broad objectives that encompass organization purpose and culture
- Produces a plan that is widely understood and accepted
- Produces a plan that is both comprehensive and detailed
- Is a model that can be rigorously applied
- Provides the energizing force to drive the needed changes
- Will enable an organization to create and achieve its ideal future
- Allows dialog to take place in a continuous and interactive manner
- Is measurable

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STRATEGIC PLANNING RESOURCES

- Academic strategy: the management revolution in American higher education, George Keller, 1983
- Applied Strategic Planning: An Introduction, Goodstein, Nolan and Pfeiffer, 1992
- Crafting Strategy, Henry Mintzberg & Harvard Business Review, No. 87407
- The Strategic Plan is Dead. Long Live Strategy. O'Donovan and Flower, Stanford Social Innovation, January 2013
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- *The Balanced Scorecard – Translating Strategy Into Action*. Boston: Harvard Business School, 1996
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- Kotter, P. and L.A. Schesinger. "Choosing Strategies for Change", *Harvard Business Review*, March-April 1979, 111
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EXTRA MATERIALS

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ROADMAP FOR THE DEVELOPMENT OF AN ORGANIZATION

FAST, REACTIVE, DEVELOPING

STEADY, PROACTIVE, SUSTAINING

FACE
STRATEGY/LEADERSHIP
CUSTOMERS
PEOPLE
WORK
INFRASTRUCTURE

	BUILD YEAR 1	GROW YEAR 2 TO 3	MATURE YEARS ONWARD
STRATEGY/LEADERSHIP	<p>Strategy</p> <ul style="list-style-type: none"> Develop mission, vision, values - engage staff at all levels Create budget tied to strategic plan Identify benchmarking and ongoing data collection to track/evaluate success and strategic alignment <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 <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"> Tailor, improve, and standardize communications approach to people know what to expect and where to go for information 	<p>Strategy</p> <ul style="list-style-type: none"> Revisit and reiterate mission, vision, values Update and focus strategy and plans for units Work on longer-term budget and plan with a focus on sustainability <p>Leadership</p> <ul style="list-style-type: none"> Create new development opportunities for leaders Develop succession plan for leaders
CUSTOMERS	<p>Customer Focus</p> <ul style="list-style-type: none"> Define customer 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"> Evaluate 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 <p>Tools</p> <ul style="list-style-type: none"> Change/update website and communication tools (as needed)
PEOPLE	<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"> Prioritize 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"> Proactively address issues with robust continuous improvement 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
WORK	<p>Process Improvement</p> <ul style="list-style-type: none"> 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) Workflow, resource 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>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 	<p>Process Improvement</p> <ul style="list-style-type: none"> Proactively address issues with robust performance analysis Track and report incident or error resolution <p>Collaboration</p> <ul style="list-style-type: none"> 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	<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"> Adopt systems 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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