

INSTITUTE FOR PERFORMANCE EXCELLENCE



BALDRIGE | PERFORMANCE EXCELLENCE | QUALITY | LEADERSHIP

# The Baldridge Foundation Institute for Performance Excellence

*Presents:*

## Agility in Strategic Planning: *Managing Change*

July 28th, 2022





Mac Baldrige Society  
Institute Trustees



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# Opening Remarks/Agenda

<b>Introduction</b>	<b>Al Faber, President &amp; CEO, Baldrige Foundation</b>
<b>Guest Presenters</b>	<b>Dr. Raina Knox, CEO &amp; Co-Founder, Stratex Solutions</b> <b>Courtney Cole, CTO &amp; Co-Founder, Stratex Solutions</b>
<b>Questions</b>	<b>Moderator</b>
<b>Closing Remarks</b>	<b>Al Faber</b>

# Stratex Solutions – Services & Software

## Strategic Planning

The strategic planning framework provides a complete solution to developing and managing the effective implementation of strategic plans.

Ascend software supports the development and embedment of strategy into the organization through governance, measurement, dashboards, and communication.



## Baldrige Performance Excellence

Embeds Baldrige into the organization, drives faster integration, bringing the Baldrige process into the 21st century.

Apex software provides full lifecycle management of organizational adoption of Baldrige framework through online, cloud-based system.

# Agenda

- Why do we believe agility is key to a successful plan?
- What are the foundational elements of strategic planning?
- How do you identify changes in the environment?
- How do you adjust and recover?

# Why do we believe agility is key?

*A lesson in hard knocks, and a little name dropping...*



Most organizations conduct strategic planning.

Most follow generic strategic planning principles.

Our combined experiences of success and failures inform our approaches.





# Strategic Planning Process

Strategy at the highest level

Tactical execution to support that strategy

Realistic work plans to attain the goals

Built in reviews to allow for adjustments to the plan.



# Internal and External Analysis

## SWOT Analysis

Strengths  
Weaknesses  
Opportunities  
Threats

## Stakeholder Feedback

Internal  
External

## When and What

## Core Competencies

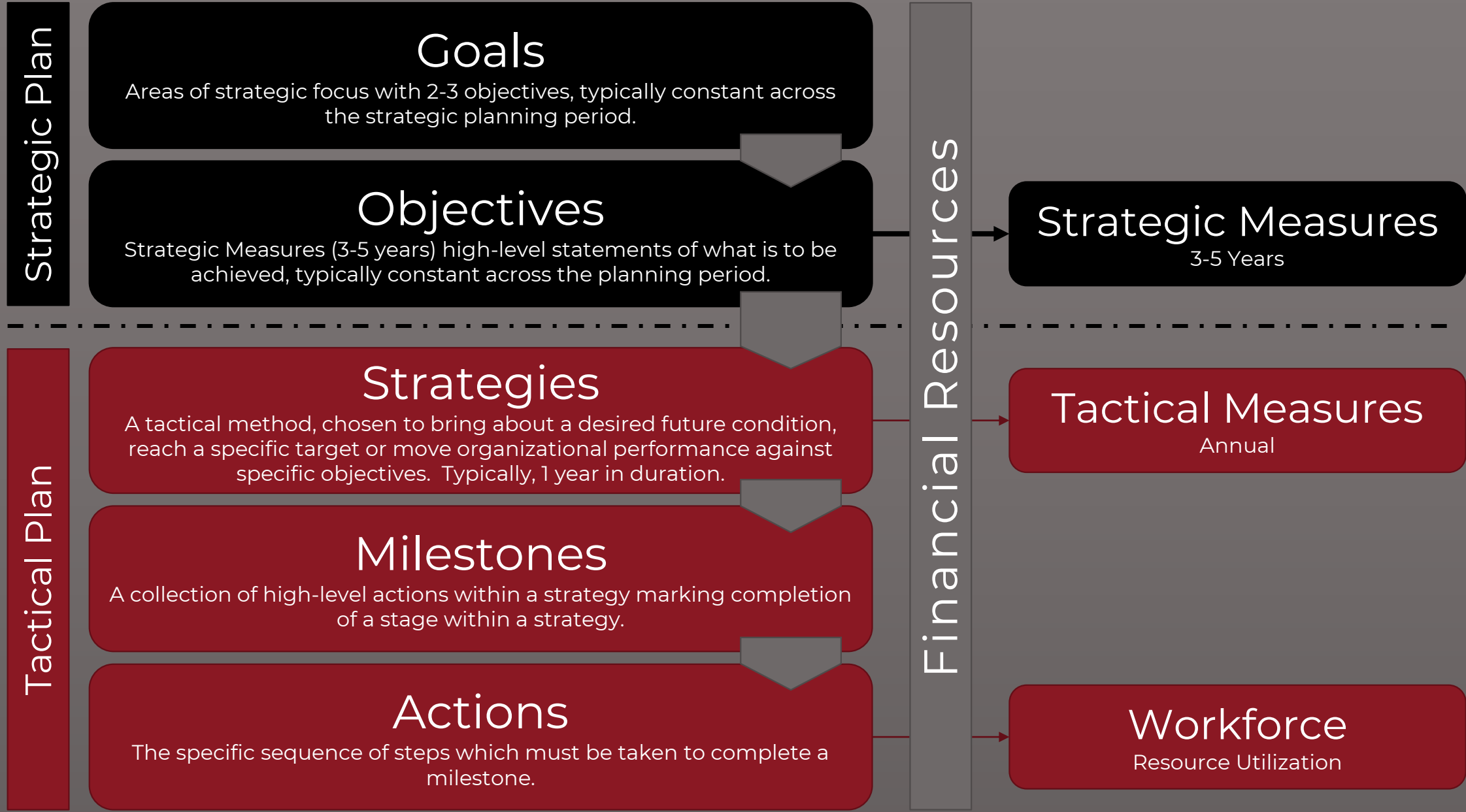
Current  
Needed

## Environmental Analysis

Technology  
Programs, Offerings and Services  
Stakeholder and Community Demographics  
Customer and Stakeholder Preferences  
Competitive Environment  
Regulatory Environment  
Barriers to Success



# Strategic Planning Framework



A formal framework is key to a successful Strategic Plan.

What might look rigid and process heavy is exactly what gives your plan the agility to flex when needed while maintaining plan integrity

# Metrics and Measures

**Metrics:** Defined as the science of measuring, or a set of measures that help you evaluate results.

**Measures:** Numerical information that quantifies the input, output, and performance dimensions of processes, products, programs, projects, services, and overall organization outcomes.

# Organizational Execution Not a Straight Line!

- Initiation of new strategic plans
- Execution of strategic plans
- New initiatives
- Review of Key Performance Indicators
- Reaction to:
  - Political and Health Events
  - Regulatory and Legislative Changes
  - At-Risk Strategic or Operational Measures
  - Leadership Changes
  - Changes in Capacity or Capability



Change Happens

# Governance – Key to Agility

- No changes to the plan or approval of “significant” projects or approved strategies occur without governance approval
  - Strategy timeline changes
    - Review and approval of new projects that
    - Have cross department impact
    - Do not have budgetary approval
    - Require resources above a certain threshold level
- Consider using business case or cost benefit analysis tools for new projects to support data driven decision making





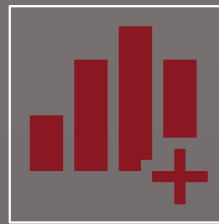
# When Change Happens



**Strategic Plan  
Review Must be a  
Priority**



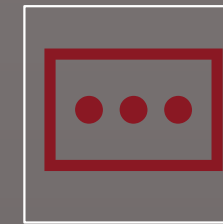
**Performance Review  
Must be Held Often  
Enough to be  
Proactive, Not  
Reactive**



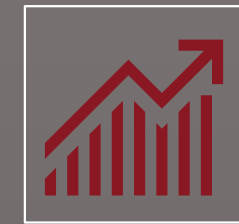
**Organizational  
Strategy Status  
Process Must be  
Systematic and  
Support  
Performance Review**



**Basis of Plan  
Adjustments as  
Needed**



**Any new strategic  
initiatives must be  
prioritized against  
approved plan.  
Capacity must be  
managed**



**Decisions and Plan  
Adjustments Must be  
Documented**

# Key Points

- Change Happens!
- To be truly AGILE you must have a process that embraces, accentuates the positives while mitigating the negatives of change.
- Governance of the Plan, should increase agility while limiting exposure.



**STRATEX**  
**SOLUTIONS**

Empowering Organizations to Realize Their Goals

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**Thank You!**

# Panelist Questions and Discussion



**Dr. Raina Knox**  
CEO & Co-Founder  
Stratex Solutions



**Courtney Cole**  
CTO & Co-Founder  
Stratex Solutions



**Al Faber**  
President & CEO  
Baldrige Foundation  
(Moderator)





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