**ROADMAP FOR THE DEVELOPMENT OF AN ORGANIZATION/UNIT/PROGRAMS/TEAMS**

**LEVEL 1**

**BUILD**

- **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 to know staff and their abilities/backgrounds
- **Communications**
  - Develop and implement internal/external communication plan
- **Customer Focus**
  - Define customers and services and create stakeholder map
  - Build relationships with customers
  - Create customer service standards
  - Implement process for customer feedback (surveys, focus groups, etc.)
- **Data**
  - Develop website and customer communication tools
- **Tools**
  - Develop and implement internal communication structure
- **Capacity**
  - Identify positions/skills needed and performance standards
  - Develop and execute against hiring timeline
  - Plan to hire diverse set of team members
- **Operationalize**
  - Build participatory culture (creating working teams, seek collaboration opportunities with other departments)
  - Establish norms (meetings, scheduling, decision-making)
  - Establish onboarding process
  - Establish recognition program
- **Customer Focus**
  - Train on service standards
- **Establish and Identify Processes**
  - Assess current state:
    - Roles and responsibilities
    - Processes and procedures
  - Operational performance measures
  - Meeting cadence, format/typology (1:1, group, retreat), timing and audience/attendees
  - Workflows, resources assignments, and capacity
  - Understand documented/undocumented organizational knowledge
  - Establish over-all understanding methodology, and adherence to documented processes and procedures
- **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
- **Data**
  - Create data and tracking processes
  - Establish policies and procedures

**LEVEL 2**

**GROW**

- **Strategy**
  - Revise 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
- **Customer Focus**
  - Build and maintain customer relationships
  - Improve understanding of customer needs
- **Data**
  - Incorporate customer feedback into Service Level Agreements and establish performance metrics
- **Tools**
  - Reevaluate website for user satisfaction
- **Capacity**
  - Implement employee development program (including coaching)
  - Establish new employee opportunities (project leads, etc.)
- **Operationalize**
  - Assess employee performance, engagement, and areas for improvement
  - Evaluate/expand recognition program
- **Customer Focus**
  - Promote culture of service (integrate with employee development plans, performance management)
  - Assess service and identify areas for improvement
- **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**
  - Align space and technology
  - Ensure collaboration systems are in place
  - Provide tools and resources for positions and teams
- **Data**
  - Prepare and use metrics and reports for decision-making
  - Implement data management governance and policies

**LEVEL 3**

**MATURE**

- **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
- **Communications**
  - Proactively seek input on what people need to know and how to find information
- **Customer Focus**
  - Develop Customer Relationship Management (CRM) plan
  - Data
    - Plan for capital or equipment replacement
    - Integrate systems internally and externally
    - Plan to hire diverse set of team members
  - Tools
    - Change/update website and communication tools (as needed)
- **Capacity**
  - Assess and practice continuous improvement
    - Provide mentoring
    - Improve team-based practices and competency
    - Enhance team expertise (training, etc.)
  - Operationalize
    - Practice continuous improvement
    - Develop and implement employee retention and succession plan
- **Customer Focus**
  - Implement continuous improvement
- **Continuous Process Improvement**
  - 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
- **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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**Note:** Could be in different levels at the same time.

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