

BENCHMARKING ORGANISATIONAL AGILITY

GENERIC SELF-ASSESSMENT TOOLS

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Action Learning Exercise

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Level 2, 112 Cameron Street Launceston Tasmania 7250

p. 1 800 678 028 f. 03-6331 7376

NOTE: This tool has been developed as a 'generic' self-assessment tool. Therefore, it does not conform to any one set of quality criteria or certification regimes. However, the tools has been developed to permit those working with such principles or criteria, to determine their level of organisational agility and to utilise this information as part of a quality certification processes. It also serves as a basis for learning and reflection.

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Instructions

This Exercise is very detailed and will require at least three hours to complete.

Participants should select an established organisation you are familiar with, or one where information has been provided prior to this exercise.

*Participants should now work together to brainstorm responses to each of the self assessment stages included in this exercise. **Note this is an indicative exercise. the aim is to permit participants to become familiar with agility criteria and procedures for self-assessment.** Criteria will vary across different organisations and quality regimes. This exercise is not intended to be a formal audit tool.*

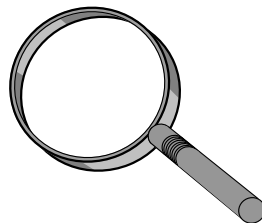
STEP

Analyse the tools & select the organisation



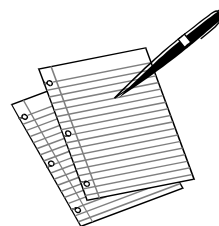
STEP 2

Collect evidence



STEP 3

Complete the self-assessment forms



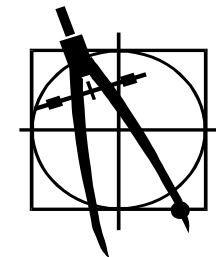
STEP 4

Make judgements on actions and priorities



STEP 5

Plot future improvement plans to achieve quality endorsement



1 SELF ASSESSMENT LEVEL MATRIX

Level 3 is the minimum required for recognition of agility as a factor contributing to competitive advantage. Level 1 to 2 would be considered reactive at best. Level 5 is marked by the unencumbered agility to move in multiple directions to seize opportunities or to defend against threats.

The matrix relates to the Plan, Do, Check and Improve columns in the self assessment proforma. It is a tool that can assist you benchmark the organisation's performance and to determine the level of organisational agility. The right hand column of the matrix identifies the Levels.

Plan	Do	Check	Improve	Level/ Score
Not part of a planned responsiveness to markets, competitors or customers.	Random relationship between individual & organisational capabilities & those required for a work outcome.	Haphazard responsiveness. No clear responsibility for solving barriers to improved service delivery.	Anecdotal. No systematic improvements evident.	Level 1 (Score 1)
Plans are ad hoc with little evidence of a plans being integrated into responsiveness.	Linkage of individual & team capabilities to planned work outcomes.	Responsive, but limited use of measures to assess the effectiveness of responses to customers/ markets.	Decisions to improve are cyclic & problem based.	Level 2 (Score 2)
Plans are focussed on improving processes, products & services to meet changing market opportunities & threats.	Work activities are applied and integrated based on individual & team capabilities.	Some positive trends evident in key areas & assessment of responses through measurement of customer needs & satisfaction levels.	Planning & customer responsiveness are subject to regular review & initiated as required.	Level 3 (Score 3) (minimum level for agility to be a competitive advantage)
Plans are clearly focussed, thorough & moving towards built-in responsiveness within all processes and service teams.	Individual & team capabilities are applied & developed to deliver organisational strategic needs outcomes.	Consistent, positive responsiveness evident. Evidence that optimum results/ outcomes is caused by integration of actions into business procedures & systems.	Improvement processes are integrated into operational systems with improvements reported across the organisation.	Level 4 (Score 4)
Planning process is accepted as dynamic & is designed to respond to opportunities and threats.	Individual & team capabilities are applied and developed to deliver organisational capabilities that represent a unique competitive advantage.	Built-in reporting mechanisms mapping & recording improved outcomes for customers & comparative data with external organisations for competitive position.	Improvement processes are designed-in to everyday systems & serves to enhance both learning & trigger pre-emptive actions.	Level 5 (Score 5)

HOW TO COMPLETE THE PROFORMA

An example

Self Assessment Proforma - LEADERSHIP

Leaders foster, communicate and model a vision, values and set of goals that embrace agility as a competitive factor.

You may immediately identify actions that will improve agility and/ or your scores for a standard.

ONE Leadership Outcomes	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN <i>Was it a planned response?</i>	DO <i>How quickly did we respond?</i>	CHECK <i>What well did we learn from the results?</i>	IMPROVEMENT <i>Have we locked in improvements?</i>		
A) Staff and stakeholders are involved and considered in developing the organisation's purpose and values.						
SCORE					TOTAL =	

Score where you think the organisation has progressed against this criterion for the 'Plan' stage. Refer back to the scoring matrix on the previous page and rank your organisation for this standard under the Leadership Criteria.

Now move on and score the Do, Check and Improve stages for this standard.

You may wish to note evidence or where evidence may exist to support your score. This will assist confirm your/ other's ranking. It will also target where the absence of evidence may require specific responses. You can do this for every stage and score.

The total score indicates an overall progression for this standard. The total score for all standards under a criteria (in this case Leadership) will indicate progression towards a level of agility. It is formally recorded using a table at the end of this document

1.1 Self Assessment Proforma - LEADERSHIP

Leaders foster, communicate and model a vision, values and set of goals that embrace agility as a competitive factor.

ONE Leadership Outcomes	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN Was it a planned response?	DO How quickly did we respond?	CHECK What well did we learn from the results?	IMPROVEMENT Have we locked in improvements?		
A) Our staff and stakeholders are involved and shape the organisation's purpose and values						
SCORE					TOTAL =	
B) Our leaders' behaviours are a credible and reliable example of our organisation's values and goals						
SCORE					TOTAL =	
C) We have planning processes that stimulate learning, continuous improvement and the involvement of all staff in achieving a shared future.						
SCORE					TOTAL =	
D) Leaders model and encourage ethical practices, accountability and responsibility to the community.						
SCORE					TOTAL =	
E) We have a vision all can share and individually align with						
SCORE					TOTAL =	
F) Our leaders work with others to communicate a clear sense of direction and strategic future						
SCORE					TOTAL =	
G) All actions and business processes are utilised as communication processes						
SCORE					TOTAL =	

You may wish to score each level and also note in the box above the score what or where evidence may be collected to support your score. To do this it may be best to copy each pro forma onto an A3 page.

1.2 Self Assessment Proforma - CLIENT FOCUS

We know our customers and move to make every product and service fit their specific preferences while striving to retain and gain customers.

TWO Client Focus Outcomes	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN <i>Was it a planned response?</i>	DO <i>How quickly did we respond?</i>	CHECK <i>What well did we learn from the results?</i>	IMPROVEMENT <i>Have we locked in improvements?</i>		
A) We have identified our internal and external customers						
SCORE					TOTAL =	
B) We have identified our potential customers not currently being serviced						
SCORE					TOTAL =	
C) We know and understand how and why our customers use our products, services and information						
SCORE					TOTAL =	
D) We know the different needs our customers have for each product/ service.						
SCORE					TOTAL =	
E) We customize our products, services and information offerings to satisfy customer preferences						
SCORE					TOTAL =	
F) We continuously search for better and quicker ways to service our customers						
SCORE					TOTAL =	
G) We continuously search for better and quicker ways to gain customer feedback						
SCORE					TOTAL =	

1.3 Self Assessment Proforma - ORGANISATIONAL DEVELOPMENT

Our structure is configured to focus the capabilities (knowledge assets) and operational systems we need to service a market or customer at a given point in time. The capabilities may be rapidly reconfigured to meet changing needs, but we are driven by customer and market needs. We can access and acquire capabilities through a knowledge network that extend beyond our formal operational boundaries.

THREE Planning Outcomes	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN <i>Was it a planned response?</i>	DO <i>How quickly did we respond?</i>	CHECK <i>What well did we learn from the results?</i>	IMPROVEMENT <i>Have we locked in improvements?</i>		
A) We have a structure designed to focus the capabilities we need to service a market/ customer						
SCORE					TOTAL =	
B) Our vision sets a direction customers and suppliers want us to achieve						
SCORE					TOTAL =	
C) Our structure reflects operational efficiency needs not artificial functional boundaries						
SCORE					TOTAL =	
D) Organisational values are translated into policies at all levels.						
SCORE					TOTAL =	
E) Our structure does not prevent us from immediately responding to new competitive threats and market opportunities with agility						
SCORE					TOTAL =	
F) We can rapidly reconfigure structures and operational processes to both lead, and to respond to, unanticipated change						
SCORE					TOTAL =	
G) We can quickly import the human capabilities we need to service markets/ customers						
SCORE					TOTAL =	

1.4 Self Assessment Proforma - INFORMATION ANALYSIS & KNOWLEDGE AND LEARNING

We use information to position our strategic operations. We also convert information into knowledge in well orchestrated formal and informal organisational learning systems. The speed we learn and the integration of contextual knowledge embedded within our people and systems, gives us a unique competitive advantage.

FOUR Information and Analysis Outcomes	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN Was it a planned response?	DO How quickly did we respond?	CHECK What well did we learn from the results?	IMPROVEMENT Have we locked in improvements?		
A) We can report a capital value for our knowledge assets						
SCORE					TOTAL =	
B) We know the capabilities required to succeed as an individual team and company today and in the future						
SCORE					TOTAL =	
C) We have frameworks for accelerating the absorption and transfer of learning between individuals and teams						
SCORE					TOTAL =	
D) We continuously monitor and interpret our business intelligence and performance data						
SCORE					TOTAL =	
E) We capture, report and record all customer contact & service information						
SCORE					TOTAL =	
F) Our competitive knowledge is deeply embedded in our people, networks & systems not text books, manuals and product/ service specifications						
SCORE					TOTAL =	
G) We all learn from our experiences						
SCORE					TOTAL =	

1.5 Self Assessment Proforma - PEOPLE

Our people enable us to embed competitive advantage in our shared identity, culture, the networks we build with community and business partners, and the way we embed responsiveness into everything we do. Through the balanced development of codified knowledge and knowledge preserved in individual interactions with customers and partners in our network, we know our competitors in the marketplace cannot easily replicate our business.

FIVE People Outcomes	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN <i>Was it a planned response?</i>	DO <i>How quickly did we respond?</i>	CHECK <i>What well did we learn from the results?</i>	IMPROVEMENT <i>Have we locked in improvements?</i>		
A) Diversity is valued and individual contributions to collective goals and visions are encouraged and embraced.						
SCORE					TOTAL =	
B) All staff evidence quality & continuous improvement behaviours in their daily work						
SCORE					TOTAL =	
C) We can measure and value capabilities held by staff that may seemingly make no immediate contribution to productivity						
SCORE					TOTAL =	
D) All staff can access their capability profiles and reports						
SCORE					TOTAL =	
E) Our staff work in the teams and locations that balance individual and operational needs						
SCORE					TOTAL =	
F) All staff understand their role and value in delivering an outcome to a customer						
SCORE					TOTAL =	
G) We develop our people for their lifelong careers not our operational servitude						

1.6 Self Assessment Proforma - TECHNOLOGY AND INNOVATION

We instil a sense of continuous search for better ways and means to achieve strategic and customer outcomes. We invest in, and actively partner organisations expert in scientific and technology development. Our ICT and systems architecture maximise knowledge capture and transfer while ensuring maximum responsiveness to operational imperatives.

SIX Technology and Innovation	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN Was it a planned response?	DO How quickly did we respond?	CHECK What well did we learn from the results?	IMPROVEMENT Have we locked in improvements?		
A) We know investing in, and stimulating innovation, is not a risk						
SCORE					TOTAL =	
B) We use technology to enable, rather than drive change						
SCORE					TOTAL =	
C) We use IT and technology architectures is shaped to deliver organisational outcomes						
SCORE					TOTAL =	
D) We map and anticipate both threats and opportunities presented by science and technology innovations						
SCORE					TOTAL =	
E) What we cannot research and predict we partner with others who can						
SCORE					TOTAL =	
F) Our products/ services and delivery systems are not so technology-dependent the best solution cannot be adopted						
SCORE					TOTAL =	
G) We embrace individual creativity and its contribution to knowledge generation and innovation						
SCORE					TOTAL =	

1.7 Self Assessment Proforma - COMPETITIVENESS

We know our competitors and their inherent strengths. We can anticipate opportunities in current and emerging markets and have the data to establish our current and future advantage when compared with our competitors.

SEVEN Competitiveness	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN Was it a planned response?	DO How quickly did we respond?	CHECK What well did we learn from the results?	IMPROVEMENT Have we locked in improvements?		
A) We know our market position						
SCORE					TOTAL =	
B) We know how well developed our markets and products are (position in the life cycle)						
SCORE					TOTAL =	
C) We capture, report and record strategic intelligence on our major competitors						
SCORE					TOTAL =	
D) We know our potential competitors						
SCORE					TOTAL =	
E) We understand where markets will emerge						
SCORE					TOTAL =	
F) We understand where markets will mature and decline						
SCORE					TOTAL =	
G) We have formal strategies for identifying and 'grafting' from another business or new personnel knowledge we need						
SCORE					TOTAL =	

1.8 Self Assessment Proforma - MARKET POSITION

We can respond to new and unanticipated markets that emerge in both virtual and physical marketplaces. We can react to seize business opportunities or aggressively address threats.

EIGHT Market Position	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN Was it a planned response?	DO How quickly did we respond?	CHECK What well did we learn from the results?	IMPROVEMENT Have we locked in improvements?		
A) We know our capabilities with regards entering into new or emerging markets						
SCORE					TOTAL =	
B) We can effectively measure how quickly we can respond to new opportunities or threats before we act						
SCORE					TOTAL =	
C) We have mapped our ability to apply current capabilities to future markets and know our capability gaps (Productive potential)						
SCORE					TOTAL =	
D) We know local market needs and customer culture within that market						
SCORE					TOTAL =	
E) We measure and report our success with servicing new customers						
SCORE					TOTAL =	
F) We use effective tools to measure and research market trends and movements						
SCORE					TOTAL =	
G) We know what represents a market opportunity						
SCORE					TOTAL =	

1.9 Self Assessment Proforma - COLLABORATIVE NETWORK

We collaborate across a network of business relationships, service relationships and individual and community interactions. We can measure and value the knowledge resident in individuals and groups outside our operational parameters and actively seek to harness and import such knowledge into our organisational capabilities.

NINE Collaborative network.	EVIDENCE				Action Plan for Improvement	Priorities
	PLAN Was it a planned response?	DO How quickly did we respond?	CHECK What well did we learn from the results?	IMPROVEMENT Have we locked in improvements?		
A) We can measure the value we add at all points in our supply chain						
SCORE					TOTAL =	
B) We seek technology and business partners to ensure we service our customers with the best supply modes						
SCORE					TOTAL =	
C) We learn collaboratively with others outside our organisational boundaries						
SCORE					TOTAL =	
D) Our competitive advantage resides in networks our people have within and outside our organisational boundaries						
SCORE					TOTAL =	
E) Our people work in networks (physical or virtual) that best address the market opportunity or competitive threat						
SCORE					TOTAL =	
F) We understand the impact of new technologies on supply and distribution networks						
SCORE					TOTAL =	
G) Our business networks and IT systems use standard interchange protocols that maximise information sharing						
SCORE					TOTAL =	

2 Scoring the Level of Agility for the Organisation

2.1 Assessing Overall Level of Agility

Place each score for the six or nine criteria for each plan, do, check, and improve stage. Then give each a total score.

Level for each criterion against plan, do check, improve columns.	1. Leadership	2. Customer Focus	3. Organisational Development	4. Information Analysis, Knowledge & learning	5. People	6. Technology & Innovation	7. Competitive-ness	8. Market Position	9. Collaborative Network	TOTAL
Plan										
Do										
Check										
Improve										
Overall Score for Criterion										
									Total Organisation Score	

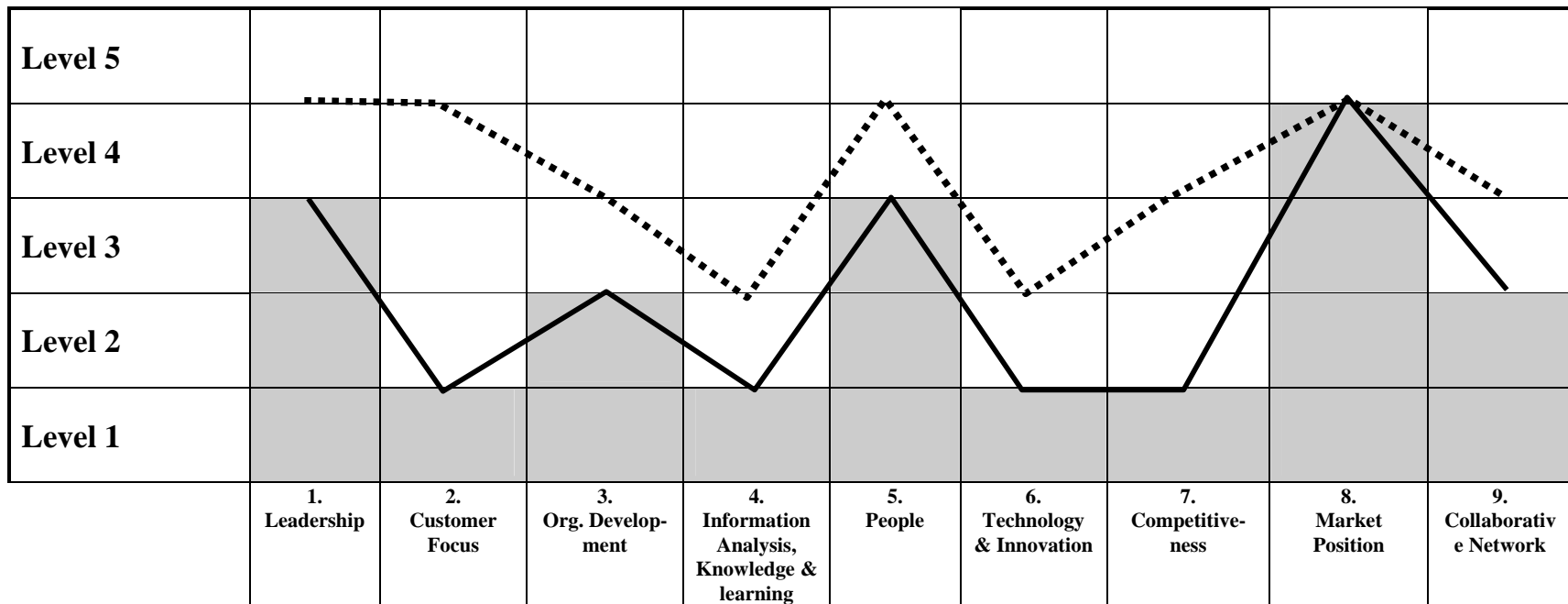
3 Mapping the level of agility

Total Scores (Aggregate Level)

Having complete total score for each standard across seven criteria each you can translate aggregate scores into levels (as described on the self assessment matrix page 4)

1 to 7 = :Level 1 (Least agile) 8 to 14 = Level 2 15 to 21 = Level 3 22 to 28 = Level 4 29 to 35 = Level 5 (Most agile)

Shade the boxes attained (score) for each criteria. An example of how to complete this mapping exercise is depicted below.



Once shaded the criteria to be achieved in an action plan become clearer. Using a simple line graph it is then possible to identify gaps to close as part of a prioritised action plan. The thin solid black line is **current level of agility**, the broken black line represents the prioritised targets for the action plan. The dotted line could also be the next report that now depicts improvements since the previous self-assessment exercise.

Now complete the exercise based on the self-assessment, the organisation's agility level and future action plan priorities.

Level 5									
Level 4									
Level 3									
Level 2									
Level 1									
	1. Leadership	2. Customer Focus	3. Organisational Develop-ment	4. Information Analysis, Knowledge & learning	5. People	6. Technology & Innovation	7. Competitive- ness	8. Market Position	9. Collaborative Network

4 Summary of Opportunities for Generating Improved Agility

Go through the 'opportunities for improvement' listed on the self-assessment proformas for each criterion, and identify about 5 of the highest priorities for the organisation.

Priority	Opportunities for Generating Improved Agility