

Strategic Roadmap for Culture of Innovation & Program Scorecard

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Agenda

- **Project Goals**
 - Determine what is in scope and out of scope
 - Develop a strategy map / goal tree
 - Develop a comprehensive innovation program scorecard
- **Recommendations**
- **Supporting Findings**
- **Conclusion**
- **Q&A**

How can we drive Carver County forward using Innovation as a source of growth?

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What are we looking to achieve?

Identity
Identifies who we are.

Vision
Outlines where we want to be.

Mission
Defines our purpose & how we will get to where we want to be.

Goals
Serve as the foundation for all strategies, work & priorities

Innovation
Introduces new ideas & creates better solutions.

Carver County

Keeping Carver County a great place to live, work & play

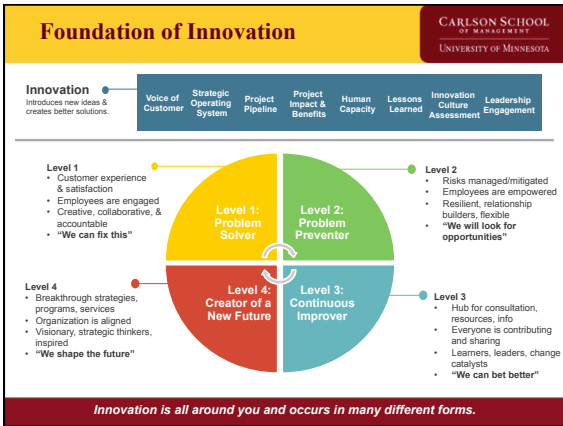
Meet service requirements & special needs of our residents

Culture Communities Connections Finances Growth

Voice of Customer Strategic Operating System Project Pipeline Project Impact & Benefits Human Capacity Lessons Learned Innovation Culture Assessment Leadership Engagement

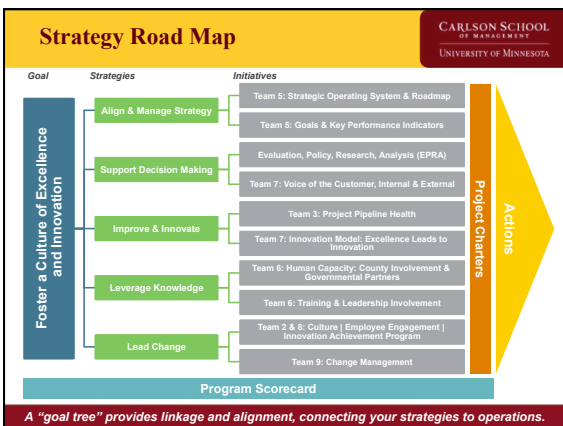
A well executed strategy leads to desired strategic results.

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RECOMMENDATION #1

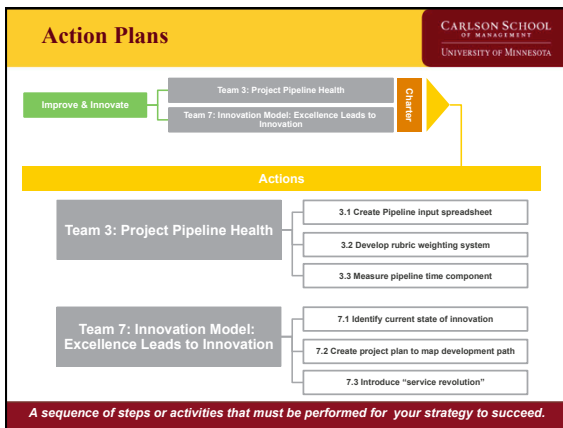


Project Charter

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Business Case & Problem Statement <p>Business Case:</p> <ul style="list-style-type: none"> • Explanation of why to do the project • For example, will it improve customer satisfaction, decrease defects, increase market share, save estimate dollars... relate it to the business objectives <p>Problem / Opportunity Statement:</p> <ul style="list-style-type: none"> • Description of the problem/opportunity and objective in clear, concise, measurable terms • Period of Problem/Opportunity: _____ • Where the Problem/Opportunity is occurring: _____ • Customer Impacted: _____ <p style="text-align: center;">Key Deliverables & Milestones</p> <p>Start Date: _____</p> <p>Deliverables targeted:</p> <table style="width: 100%; border-collapse: collapse; font-size: x-small;"> <tr> <td>• Deliverable #1</td> <td style="text-align: right;">target date</td> </tr> <tr> <td>• Deliverable #2</td> <td style="text-align: right;">target date</td> </tr> <tr> <td>• Deliverable #3</td> <td style="text-align: right;">target date</td> </tr> <tr> <td>• Deliverable #4</td> <td style="text-align: right;">target date</td> </tr> <tr> <td>• Deliverable #5</td> <td style="text-align: right;">target date</td> </tr> </table> <p style="text-align: center;">Team Members</p> <ul style="list-style-type: none"> • Sponsor: _____ • Project Manager: _____ • Core Team Members: People, Responsibilities • Key Stakeholders: People impacted, Role involvement 	• Deliverable #1	target date	• Deliverable #2	target date	• Deliverable #3	target date	• Deliverable #4	target date	• Deliverable #5	target date	Goal Statement & Project Scope <p>Goal Statement:</p> <ul style="list-style-type: none"> • Should start with a verb (reduce, eliminate, increase, control), then should explain what the project will do by what percent, dollar amount in what time frame <ul style="list-style-type: none"> • i.e. Reduce cost by \$100K by 12/31/2016 <p>In Scope:</p> <ul style="list-style-type: none"> • Activities required to complete the deliverables • Process dimensions, available resources • On what process with the team focus on? What are the boundaries of the process you would like? <p>Out of Scope:</p> <ul style="list-style-type: none"> • Activities that will not be included in the scope of work • Other processes that will not be reviewed in this project scope <table style="width: 100%; border-collapse: collapse; font-size: x-small;"> <tr style="background-color: #4a7ebb; color: white;"> <th colspan="4">Measures</th> </tr> <tr> <th>Measure</th> <th>Baseline</th> <th>Goal</th> <th>Data Source</th> </tr> </table> <p>Financial Impact:</p> <ul style="list-style-type: none"> • Is this a cost avoidance? Estimate • Is this a productivity enhancement? Estimate • Will it impact volume, create incremental sales/new accounts? Estimate <p style="text-align: center;">Voice of Customer</p> <p style="font-size: x-small;">If you have identified Customers, segment into Internal and External/Consumer vs. B2B Client and include some of their comments that relate to the problem.</p>	Measures				Measure	Baseline	Goal	Data Source
• Deliverable #1	target date																		
• Deliverable #2	target date																		
• Deliverable #3	target date																		
• Deliverable #4	target date																		
• Deliverable #5	target date																		
Measures																			
Measure	Baseline	Goal	Data Source																

Identifies your project vision and creates a fluid path for your project team.



Weekly Status Report

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Strategy: Improve & Innovate
 Initiative: Project Pipeline Health
 Action: 3.1 Create Pipeline Spreadsheet

Project Status: 0% 50% 100%

Key Accomplishments	Key Work – In Progress	Issues & Points of Discussion

Resources

Activity	Competency	Person	Materials	Equipment	Supplies	Other
Host Kaizen Training event	Lean Management/ Six Sigma	Jive Smith	Training guides, pens	Laptop, projector	Battery, bulbs	

Communication

Audience	Output/Action	Date/Time	Delivery	Lead	Feedback Loops
Who are the recipients of the information?	What is being communicated?	When will the information be communicated?	How will the info be communicated?	Who is responsible for communicating the info?	How to ensure communication is 2-way?

Enables project transparency, gauges your team member progress and identifies issues.

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RECOMMENDATION #2

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Program Scorecard

"I often say that when you can measure what you are speaking about, and express it in numbers, you know something about it; but when you cannot measure it, when you cannot express it in numbers, your knowledge is of a meager and unsatisfactory kind. If you can not measure it, you can not improve it."

Lord Kelvin, British scientist

"A ... scorecard monitors the progress toward accomplishing the strategic objectives in the strategy map." (Cokins)

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Program Scorecard

Goal	Objective	Measure	Target	Actual	Status
Project Impact and Benefits (Team 1)	Financial Return	FTE Savings	5%	6%	120%

Goals Overarching principle that guides decision making

↓

Objectives Specific, measurable steps taken to meet the goal

↓

Measures Definition of how objectives are quantified

↓

Targets Value that marks success in achieving objectives

Program Scorecard: Pros/Cons

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Purpose:

Why: assessment and evaluation of corporate activities in terms of overall strategy and vision

What: focus on four perspectives - customer perspective, learning and growth perspective, internal business processes perspective and financial perspective.

How: five to six metrics are identified with justification for each of the perspectives. The data derived from these metrics should be able to help managers understand how a new project is performing.

Benefits:

- Through the metrics identified, managers should be able determine a project's performance through the function of the perspectives identified
- Important to have simple, meaningful and measurable metrics

Assess and evaluate your corporate activities in terms of overall strategy and vision.

Long-Term Program Scorecard

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Carver County is not in "business to make money, but rather to provide mandated services to satisfy constituents and members and provide needed services efficiently and effectively" Balanced Scorecard Institute

For a Business

- Financial/profit margin/loss perspective (FTE)
- Internal completion perspective
- Learning/Growth Perspective
- Customer Perspective

For Government

- Customer/Shareholder Perspective
- Financial Stewardship Perspective
- Internal Process Perspective
- Organizational Capacity & Learning and Growth Perspective

- Project Impact & Benefits
- Lessons Learned, Satisfaction, and Communication
- Project Pipeline and Innovations beyond Kaizen and Lean
- Strategic Operating System
- Human Capacity
- Innovation Model/VOC
- Innovation Culture Assessment + Analysis/Action Planning
- Leadership Engagement & Change Management

Carver County will blend Gov't and Business needs for future outcome of balanced scorecard

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SUPPORTING FINDINGS

Strategy Road Map

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Current State
Need to establish & implement tool that transforms innovation ideas & strategies into a visual guide

Others Who Have Been There

- Medtronic
- Walmart
- University of Kansas

Potential Roadblocks

- Financial—minimal at most, alignment from top key players
- Cultural/Organizational—need for transparent communication, explanation of the current mission and alignment

Efficiently communicate your mission, vision and strategies to project teams and upper management to create linkage and alignment.

Program Scorecard

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Current State
Need for a program scorecard is evident in Kaizen projects, and with abundance of projects, no way to determine those with greatest impact

Others Who Have Been There

- Bain & Company
- Hennepin County
- Balanced Scorecard Institute

Potential Roadblocks

- Financial—will vary based on project, needs to benefit external stakeholders
- Cultural/Organizational—barriers may exist, leverage informal networks, identify influential project champions

Measure and provide feedback to organization in order to assist in implementing your strategies and objectives.

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CONCLUSION

Conclusion & Summary

Strategy Roadmap
Efficient tool that outlines the goals and objectives Carver County (CC) has laid out for its innovation program

Next Steps
0 – 2 Years

- Discuss strategy house
- Align projects with mission & vision
- Identify project purpose & sponsors
- Develop initiatives & action plans

3 – 5 Years

- Standardize template specific to CC
- Utilize templates county wide

Program Scorecard
Metric used to identify and improve various internal functional performance and their resulting external outcomes

Next Steps
0 – 2 Years

- Define how scorecard will be used
- Identify KPIs
- Gain approval by project sponsors
- Require scorecard on projects going forward

3 – 5 Years

- Assess scorecard & adjust if needed

When used together a strategy map and scorecard enable any member of your organization to clearly see how their efforts contribute to achieving the strategic objectives of the organization, and progress the organization is making towards its goals.

Q&A
