TURNING STRATEGY INTO ACTION:
Moving From Planning to Execution

Presenter: Ajay M. Pangarkar, CTDP, CPA, CMA

Based Upon the Book
The Trainer’s Balanced Scorecard:
A Complete Resource for Linking Learning to Organizational Strategy
additional resources

The Trainer’s Balanced Scorecard: A Complete Resource for Linking Learning to Organizational Strategy
Ajay M. Pangarkar, Teresa Kirkwood
Published by Wiley

Building Business Acumen for Trainers: Skills to Empower the Learning Function (with CD)
Terrence Gargiulo, Ajay M. Pangarkar, Teresa Kirkwood
Published by Wiley
Learning objectives:

- Develop critical process to strategy formulation
- Identify variables supporting strategy and to deliver results
- Implement a strategy for performance expectations
- Develop a framework to support strategy execution
quick question…

How would you describe strategy?
defining strategy…

simply as going from point \( A \) to point \( B \)…

Where you are

Where you want to be
defining strategy…

then…

why do so many still get it wrong?
what strategy is not...

Strategy is more than just financial results...

...financial success is a result of a well executed, performance focused strategy

- Ajay M. Pangarkar CTDP, CPA, CMA
WHAT IS YOUR MISSION?
performance balancing act

Social Mission

Cost Efficiency

Program Effectiveness

Best Social Returns

“doing things right”

“doing the right things”

Operationally fit:
Best output result using the fewest inputs; therefore efficient input/output ratio

Mission critical:
Achieving the most possible outcomes given a finite amount of resource inputs.

Final choices:
What you’ve chosen to do to meet the mission
Over the next 4 years, the City of Ottawa will increase the public confidence in City Government and improve resident, enterprise, and visitor satisfaction with City services.
it’s your turn…

Are you able to:

- Clearly define your mission?
- Identify the effective offerings?
- Identify inefficiencies in those offerings?
- Identify key stakeholders and their expectations?
It’s time to make difficult strategic – performance choices
tough strategic choices

Lather, Rinse, Repeat…

Stakeholders:
- Tax payer
- Users
- Employees
- Unions
- Other?

Existing services /programs?
- Yes
- No

Align with mission?
- Yes
- No

Performance expectations?
- Yes
- No

Resources available?
- Yes
- No

Used effectively?
- Yes
- No

Achieving mission?
- Yes
- No

Viable?
- Yes
- No

Evaluate

New services /programs

Yes

No
"What's in it for me?"

Step back…What’s the city’s performance ABOUT?

Keep performance SIMPLE…get back to basics!

Dare to be BOLD…make the connections
what performance is about

...at the Municipal Level

What do we do with the money we have?

What did we promise to citizens?

Effective Financial Allocation
what performance is about

…for your city (or any city)

Tax Payer / Citizen

What You Need to Do?

How Will This Happen?

What Resources are Required?

“Customer”

Processes

Learning

Money

Satisfaction & Confidence

Service Excellence

Employee Engagement

Tax Payer
Dare to be...

What would your city become if it improves by...

1%  5%  10%  ???
City of Ottawa’s Service Excellence Framework

Employee Engagement

What employees know/need to know

Client Satisfaction

What employees need to do

Organizational Performance

Confidence & Trust in the City of Ottawa

How can we improve by… 1% 5% 10%?
Dare to be... **BOLD**

- Employee Engagement
  - What employees know/need to know
  - What does strategy mean to people?
  - Illustrate how they make a difference
  - Establish a culture; be the example
  - Encourage “think different”

- Organizational Performance
  - What do employees need to do
it’s your turn…

Answer these questions?

→ What does strategy mean to your people?

→ Can you demonstrate how they can they make a difference

→ Have you led by example?

→ Are you encouraging “think different”?
Dare to be... **BOLD**

*How can we improve by...* 1%  5%  10%?

**Employee Engagement**
- What employees know/need to know

**Organizational Performance**
- What employees need to do

Organizational knowledge is about:
- Relevancy to mission
- Focus on key elements
- Access knowledge resources
- Build performance culture
The accounting paradox:

- Manage and control costs
- Provide expected service to users
- Slash and burn OR strategic costing

Change your performance perspective…

⇒ Drive “Value”…NOT efficiencies
Once the City put in place a BSC…

...It intends is to live up to its mission!

- Respect citizens; How many connections?
- Discover the connections; Every “business” level
- Develop skills to get where you want to be
- Discover what is wasting our time and limiting our performance
### Performance process

#### 1. Reviewing
- Review mission, vision, strategy
- Identify user value proposition
- Balance efficiency versus effectiveness

#### 2. Mapping
- Start with mission
- Choose/confirm value proposition
- Choose key stakeholder strategies
- Choose key financial strategies
- Choose key internal strategies
- Choose key learning strategies

#### 3. Executing
- Identify measures
- Assign weights
- Balance measures
- Set specific targets
- Manage risk

#### 4. Manage
- Manage with balanced scorecard
- Evaluate results versus targets
- Examine results and outcomes
- Adjust as necessary

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Performance Measurement for Non-Profit Organizations; CPA Canada 2016
quick question…

what are you taking away today?

• Turn to the person next to you

• Take 1 minute to identify one take-away and how you’ll apply it
turning strategy into action

learning objectives review:

- Recognize strategy is not just financial
- An evolving process to achieve the mission
- Need to know where you want to go
- Objectively assess its current situation
- Aligns with the mission
- Leverages what it does well, mitigates what it doesn’t
- Failure occurs when not operationalized
- Creates tangible connections throughout the organization
thank you…please follow my blog

“Workforce Revolution!” blog.centralknowledge.com

TrainingIndustry.com

- The CLO Reality:
  What It Takes to Lead & Manage the Learning Function

- The Business Leaders Bottom Line:
  Aligning Learning With Organizational Needs

- Building Strategic Learning Linkages:
  Mapping & Measuring Your Learning Strategy

TrainingMag “Last Word”

- Taking Care of Business
- Let’s Get Naked!
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