XYZ Corporation Organizational Assessment

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BIS-357: Assessment in Organizations
Dr. Lillian Wallace
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Arizona State University
Welcome to the Organizational Assessment Team!

The Board of Directors of XYZ Corporation have requested that an organizational assessment be conducted to establish the organizational performance goals for 2018. You have been personally selected from a large group of talented individuals to participate in this highly-visible project. Your support of this project will reflect your commitment to high standards of performance excellence and quality service to our customers with whom we interact each and every day. Your dedication to the company and familiarity with the organization earned you a spot on the team.

Building upon our past successes, the organization will be implementing a companywide assessment which will touch every aspect of our business. The reasons for the assessment are three-fold:

• Our customers, the competition, and our budget are always changing; we need to respond to those changes to maintain our competitive advantage.
• The environment in which we conduct business is changing rapidly with new technology and other advancements.
• We have a history of being best-in-class and we want to stay that way.

The health of XYZ Corporation is what’s at stake here. It is our responsibility as leaders of this organization to make sure that the company is in good health.

It is my privilege to lead this team through the organizational assessment and provide a clear path to improved and refined processes and procedures in the upcoming New Year. Over the course of our time together, I will provide you with the details of the assessment, your role and how you will champion it within your division, and the associated due dates for each step. Serving on this team is an opportunity for you to gain visibility within your respective areas, as well as at the highest levels of the organization.

You are about to embark upon a highly-visible project. A successful outcome holds tremendous career-building potential for you personally and for the team in general. Here’s to our future success!

Warmly,

Denise D. Wolsieffer
Project Leader
# Welcome Letter

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What is an organizational assessment?

Webster defines assessment as “the action or an instance of making a judgment about something: the act of assessing something” (Merriam-Webster, 2017). Applying this definition to an organizational assessment, we are talking about judging and assessing an organization. XYZ Corporation. Put another way, an organizational assessment is like a medical check-up. When you go in for your annual check-up the nurse takes your pulse and blood pressure, and makes entries on to your chart. The doctor comes into the room, asks you how you have been feeling, he listens to your heart, lungs, and looks into your ears, nose and throat. All of this is the process of assessing your health. Just like you keep close tabs on your health, XYZ Corporation needs to assess and evaluate the health of the business.

The assessment that we will be using is called the Baldrige assessment. It was selected for XYZ Corporation because it examines key aspects of our business such as leadership, strategic planning, customer focus, measurement/analysis/knowledge management, workforce focus, process management, and results (Criteria for Performance Excellence, 2012). It also evaluates how well we have trained our workforce to understand these elements. The assessment will be administered by each of you in your respective divisions during the week of December 11-15, 2017. Your results are due December 18, 2017 and will be submitted on the XYZ Corporation intranet home page via a specific web portal designated for this purpose.
History

Howard Malcolm Baldrige served in the Presidential Cabinet role of Secretary of Commerce from 1981 until his death in 1987 (Baldrige Foundation, n.d.). The Secretary of Commerce is responsible for creating conditions for economic growth, business opportunities, and jobs for United States citizens (About Commerce, 2017). They are to ensure fair and secure trade agreements between the U.S. and other countries, provide data to support commerce, and foster innovation by setting standards and conducting research and development (About Commerce, 2017).

Congress created the Baldrige award to identify and recognize best-in-class organizations, establish criteria for evaluating improvement opportunities, and distribute best practices amongst U.S. businesses. The Baldrige Award was named in honor of the Secretary of Commerce who died unexpectedly in 1987 while still in office (Baldrige Foundation, n.d.). The Baldrige Award is given annually by the President of the United States in recognition of those organizations in all sectors of the economy who display a commitment to the quest for excellence in business practices (Baldrige Foundation, n.d.).

The Award Today

For 30 years organizations have utilized the Baldrige Award assessment to evaluate the effectiveness of their practices. Some may only engage in the assessment itself to periodically check on the health of their organization. Others aspire to seek recognition and submit an application for the award itself. There is a separate team of individuals who will make this determination for XYZ Corporation.
**Seven Categories to Assess**

The Baldrige Award Assessment examines seven categories; leadership, strategic planning, customer focus, measurement/analysis/knowledge management, workforce focus, process management, and results (Criteria for Performance Excellence, 2012). Through a process of questioning XYZ employees in every division of the company, data is gathered to determine strengths and weaknesses in each of these areas. Your role will be to administer the assessment and report the results to an online portal located on the XYZ intranet website. Figure 1 below shows the seven categories and their related relationships. Page 7 provides a detailed description of each category that you will be assessing.

![Baldrige Criteria for Performance Excellence Framework](file:///C:/Users/Denise%27s%20Laptop/Documents/Arizona%20State%20University/Class%20#15,%20%20BIS%20357%20Assessment%20in%20Organizations/Final%20Culminating%20Project/Baldrige%20Award-2011-2012%20Criteria%20w%20Highlighting.pdf)
Seven Categories in Detail

- Leadership—Examines how senior executives guide the organization and how the organization addresses its responsibilities to the public and practices good citizenship.

- Strategic planning—Examines how the organization sets strategic directions and how it determines key action plans.

- Customer focus—Examines how the organization determines requirements and expectations of customers and markets; builds relationships with customers; and acquires, satisfies, and retains customers.

- Measurement, analysis, and knowledge management—Examines the management, effective use, analysis, and improvement of data and information to support key organization processes and the organization’s performance management system.

- Workforce focus—Examines how the organization enables its workforce to develop its full potential and how the workforce is aligned with the organization’s objectives.

- Process management—Examines aspects of how key production/delivery and support processes are designed, managed, and improved.

- Results—Examines the organization’s performance and improvement in its key business areas: customer satisfaction, financial and marketplace performance, human resources, supplier and partner performance, operational performance, and governance and social responsibility. The category also examines how the organization performs relative to competitors.
Sample Assessment Questions

As we’ve discussed, there are seven categories that you will assess within your division. You will read through categories in the assessment materials to determine who will make the best interviewee. For example, below are excerpts from the Baldrige Assessment Category 3: Customer Focus. Take a moment to read through this and determine who in your division would be able to best answer these questions.

**Category 3: Customer Focus**

- This category has been redesigned to enhance the flow of logic and incorporate the use of social media as a mechanism for listening to customers.

- Item 3.1, now *Voice of the Customer*, asks about how you listen to current and potential customers and how you determine customer satisfaction, dissatisfaction, and engagement.

- Item 3.2, now *Customer Engagement*, asks about your product offerings, customer support, customer segmentation, and use of customer data. These are important to building customer relationships, which is addressed in the second part of the item.

**3.1 Voice of the Customer: How do you obtain information from your customers?**

**3.2 Customer Engagement: How do you engage customers to serve their needs and build relationships?**


You will record the interviewee’s answers either in writing, or by typing their responses into the portal on the intranet home page, or by recording their response to transcribed later. It is your option as to how you wish to capture the responses, but be sure to have them all entered into the web portal by the due date. You will receive an assessment planning packet via email by Friday, December 1, 2017.
After the Assessment

A delegate team from XYZ Corporation attended the 2017 Baldrige Fall Conference on October 26-27, 2017 in Tempe, AZ (California Counsel for Excellence, 2017). It will be their job to compile and organize the results that we gleaned from our assessment process. This team will develop an understanding of what we need to do to improve the organization, prioritize the opportunities, and determine whether or not we should submit an application for the Baldrige Award itself. The team will also establish our 2018 performance goals. As you all know, execution on our organizational performance goals is what drives our year-end bonus program.

Important Dates

Assessment Team Kick-Off Meeting Monday, November 27, 2017
Assessment Planning Materials Received by December 1, 2017
Assessment to be Conducted December 11-15, 2017
Results Due in Intranet Web Portal No Later Than December 18, 2017
Do’s and Don’ts

- Do plan out your process.
- Do make an appointment with your selected interviewees and ask them to allow no less than one hour to participate in the assessment. Multiple appointments may be necessary.
- Do be prepared; if you are going to use your laptop to capture answers to the assessment, test your wireless access prior to your appointment.
- Do encourage thorough answers from your interviewee. Two or three words is not sufficient for the results team to tabulate results.
- Do call on other team members if you have questions or need assistance.
- Don’t ask one interviewee to answer all of the assessment questions.
- Don’t wait until the day before your deadline and attempt to accomplish the entire assessment!

Assessment Team Members

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<tr>
<th>Name</th>
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References

Sources


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https://www.google.com/search?q=photos+of+the+baldridge+award&tbm=isch&tbo=u&source=image&biw=1366&bih=650#imgrc=OX66Eu67LiM:


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