Organisational Profile

The ***Organisational Profile*** is a snapshot of your organisation, the KEY influences on HOW you operate, and the KEY challenges you face. The profile addresses your operating environment, your key organisational relationships, your competitive environment and strategic challenges, and your approach to performance improvement. Your Organisational Profile provides context to enable us to understand your organisation and for guiding and prioritizing the information you may present in response to the Criteria Items in Categories 1–7.

***P.1 Organisational Description***

**Purpose**

This Item addresses the key characteristics and relationships that shape your organisational environment. It also addresses your organisation’s governance system. The primary aim is to set the context for your organisation and for your responses to the Criteria requirements in Categories 1–7.

**Comments**

The Organisational Profile provides your organisation with critical insight into the key internal and external factors that shape your operating environment. These factors, such as the mission, vision, values, competitive environment, and strategic challenges, impact the way that your organisation is run and the decisions you make.

As such, the Organisational Profile helps your business understand better the context in which it operates; the key requirements for current and future business success and organisational sustainability; and the needs, opportunities, and constraints placed upon your organisation’s performance management system.

Use of such terms as “purpose,” “vision,” “mission,” and “values” varies depending on the organisation, and some organisations may not use one or more of these terms.

Nevertheless, you should have a clear understanding of the essence of your business, why it exists, and where your senior leaders want to take the business in the future.

This clarity enables you to make and implement strategic decisions affecting the future of your organisation.

The regulatory environment in which you operate places requirements on your organisation and impacts how you run your business. Understanding this environment is key to making effective operational and strategic decisions. Further, it allows you to identify whether you are merely complying with the minimum requirements of applicable laws and regulations or exceeding them, a hallmark of leading organisations.

Leading organisations have well-defined governance systems with clear reporting relationships. It is important to clearly identify which functions are performed by senior leaders and, as applicable, by those responsible for governance and your parent organisation. Board independence and accountability frequently are key considerations in governance structure.

In supplier-dependent organisations, suppliers play critical roles in processes that are important to running the business and to maintaining or achieving a sustainable competitive advantage. Supply chain requirements might include on-time or just-in-time delivery, flexibility, variable staffing, research and design capability, and customized manufacturing or services.

***P.2 Organisational Challenges***

**Purpose**

This Item addresses the competitive environment in which your organisation operates and the key strategic challenges that your organisation faces. It also addresses how you approach performance improvement and organisational learning. The aim is to understand your key organisational challenges and your system for maintaining a sustainable advantage.

**Comments**

Knowledge of an organisation’s strengths, vulnerabilities, and opportunities for both improvement and growth is essential to the success and sustainability of the business. With this knowledge, you can identify those products, service offerings, processes, and performance attributes that are unique to your organisation; those that set you apart from your competitors; and those that help you to sustain your competitive advantage.

Understanding who your competitors are, how many you have, and their key characteristics is essential for determining what your competitive advantage is in your industry and marketplace. Leading organisations have an in-depth understanding of their current competitive environment, including the factors that affect day-to-day performance and factors that could impact future performance.

Sources of comparative and competitive data might include industry journals and other publications, benchmarking activities, annual reports for publicly traded companies, conferences, local networks, and trade associations.

Operating your business in today’s highly competitive marketplace means you are facing many strategic challenges that can affect your ability to sustain performance and maintain your competitive advantage. These challenges might include your operational costs (e.g., material, labor, or geographic location); expanding or decreasing markets; mergers or acquisitions both by your organisation and by your competitors; economic conditions, including fluctuating demand and economic downturns both local and global; the cyclical nature of your industry; the introduction of new or substitute products or services, possibly based on a disruptive technology; rapid technological changes; or new competitors entering the market. In addition, your organisation may face challenges related to the recruitment, hiring, and retention of qualified employees.

Today, organisations need to be scanning the environment inside and outside their immediate industry to detect such challenges at the earliest possible point in time. One of the many issues facing organisations today is how to manage, use, and share your ever-increasing organisational knowledge. Leading organisations already benefit from the knowledge assets of their employees, customers, suppliers, and partners, who together drive organisational learning and improve performance.

### P.1 Organisational Description

Describe your organisation's business environment and your KEY relationships with customers, suppliers, PARTNERS, and STAKEHOLDERS.

| **No** | **Question And Answer** |
| --- | --- |
| P.1.a.(1) | What are your organisation’s main products and services?  *What exactly do you manufacture / produce or what service(s) do you provide?* |
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| P.1.a.(1) | What are the delivery mechanisms used to provide your products and services to your CUSTOMERS?  *Explain how your products and / or services are provided to customers, as well as how they physically receive them.*  *Customers are the users and potential users of your products, programmes, and services.* |
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| P.1.a.(2) | What are the characteristics of your organisational culture?  *Explain in simple terms the personality of your organisation. What is it like for employees and customers to associate with your organisation? How is the organisation different or unique compared to other, similar organisations?* |
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| P.1.a.(2) | What are your stated VISION, MISSION, and VALUES? |
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| P.1.a.(3) | What is your EMPLOYEE profile including categories and types of EMPLOYEES?  *This information can be presented by using a table or chart that lists numbers of employees by type, location and / or rank.* |
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| P.1.a.(4) | What are your major technologies, equipment, and facilities?  *What technologies refers to specific tools, techniques and the like that you utilise predominantly from an IT point of view. Facilities refers to numbers and types of sites and Equipment refers to any “major” items of equipment that might be unique to your organisation..* |
|  |  |
| P.1.a.(5) | What is the regulatory environment under which your organisation operates?  *Describe the major regulatory factors that impact your organisation. Identify the regulations and groups that are most crucial to your success.* |
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| P.1.b.(1) | What is your organisational structure and GOVERNANCE system?  *Use a diagram to illustrate the top layers of your organisational structure.*  *With reference to your Governance system please advise if you have a Council or a Board etc that is responsible for Organisational Governance.* |
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| P.1.b.(2) | What are your KEY CUSTOMER groups and STAKEHOLDER groups, and market SEGMENTS, as appropriate?  *Identify your key market segments, and the two or three most important requirements of each to show your understanding of your markets and what drives their behaviour.*  *Market segments (P.1b[2]) might be based on product or service lines or features, geography, distribution channels, business volume, or other factors that allow your organisation to define related market characteristics.* |
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| P.1.b.(2) | What are their KEY requirements and expectations for your products and services and operations?  *Customer and stakeholder group and market segment requirements (P.1b[2]) might include cost effectiveness, on-time delivery, defect levels, service levels etc.* |
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| P.1.b.(2) | What are the differences in these requirements and expectations among CUSTOMER groups, STAKEHOLDER groups, and market SEGMENTS?  *Are there any relevant differences that you have identifies as important between different groups?.* |
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| P.1.b.(3) | What are your most important types of suppliers, partners and distributors?  *In identifying them please identify which ones are true partners and which ones you have a different type of relationship with.* |
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| P.1.b.(4) | What are your KEY supplier and CUSTOMER partnering relationships and communication mechanisms?  *In the previous questions you will have identified who your key suppliers and customers were, in this question explain how you work together, ie, what is the basis of the relationship.*  *Communication mechanisms should be two-way and might be in person, via regular mail, email, by telephone. For many organisations, these mechanisms may change as marketplace requirements change.* |
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### P.2 Organisational Challenges

Describe your organisation's competitive environment, your KEY STRATEGIC CHALLENGES, and your system for PERFORMANCE improvement.

| **No** | **Question And Answer** |
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| P.2.a.(1) | What is your competitive position?  *Identify where you are positioned in your industry / sector, eg, market share / size and growth rate. if relevant detail any potential future competitors you are aware of.* |
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| P.2.a.(1) | What are the numbers and types of competitors for your organisation?  *If possible identify the top four to six competitors and their relative market share.* |
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| P.2.a.(2) | What are the principal factors that determine your success relative to your competitors?  *Explain how you position yourself in the marketplace to differentiate your products/services.*  *Factors (P.2a[2]) might include differentiators such as price leadership, design services, e-services, geographic proximity, and warranty and product options.*  *For some non-profit organisations, differentiators might also include relative influence with decision makers, ratio of administrative costs to programmatic contributions, past reputation for program or service delivery and wait times for service.* |
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| P.2.a.(2) | Are there any KEY changes taking place that may affect your competitive situation?  *Are there any KEY changes taking place that affect your competitive situation? If ‘Yes’ describe them.*  *What current or projected changes are going on in your industry that might change your position in the market place in the future?* |
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| P.2.a.(3) | What are your KEY available sources of comparative and competitive data from within your industry?  *Where do you obtain market information that is relevant for use as comparisons and / or benchmarking?.* |
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| P.2.b | What are your KEY business, operational, and human resource STRATEGIC CHALLENGES?  *Explain the major challenges that impact your entire business.*  *Strategic challenges might include rapid technological change, disruptive technologies that rapidly revolutionise or make obsolete existing processes or products, reduced cycle times for product introduction, industry volatility, declining market share, a changing marketplace, mergers and acquisitions, global marketing and competition, customer retention, changing or emerging customer or regulatory requirements, employee retention, an aging workforce, and value chain integration.* |
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| P.2.c | HOW do you maintain an overall organisational focus on PERFORMANCE improvement, including organisational LEARNING?  *Performance improvement (P.2c) is an assessment dimension used in the Scoring System to evaluate the maturity of organisational approaches and deployment. This question is intended to help you and Evaluators set a context for your approach to performance improvement.*  *Overall approaches to process improvement (P.2c) might include implementing a Lean Enterprise System, use of the Baldrige Criteria, Six Sigma methodology, use of ISO 9000:2000 standards, or other process improvement tools.* |
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| P.2.c | HOW do you achieve SYSTEMATIC evaluation and improvement of KEY PROCESSES?  *What process do you use to regularly evaluate and improve the efficiency / effectiveness of your key processes?.* |
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