**Sterling Organizational Profile**

**Leadership Series**

***Organizational Profile***

***Key Factors Worksheet***

**Creating your own Organizational Profile**

**February 2022**



**Organizational Profile**

**P1 Organizational Description: What are your key organizational characteristics?**

**P1a Organizational Environment**

**P.1a(1) Product and Services Offerings**

* Main Product and Service Offerings? – *may be programs, projects or services*
* Relative Importance of each to your SUCCESS? – *are they equal? are there priorities?*
* Mechanisms for delivery – *direct or indirect*

**P.1a(2) Mission, Vision and Values and Culture**

* Your Mission – *may also be Purpose – Why you exist*
* Your Vision – *Where do you see the organization in the future. Inspires the organization – guides the setting of values*
* Your Values *– part of your organization's culture i.e., shared beliefs, norms that contribute to the uniqueness of the environment*
* Characteristics of your Organizational Culture, if any
* Organization’s Core Competencies, and relative importance to your mission. *Core Competencies are your organization’s greatest expertise – strategically important capabilities that are central to fulfilling your mission*. *May involve technological expertise, unique service offering, marketplace niche*

**P.1a(3) Workforce Profile**

* What is your Workforce Profile, including any recent changes in composition or needs
* Segments and employee groups – *unique requirements for each, education, training, etc.*
* Key Drivers for Engagement
* Any Collective Bargaining units
* Any Special Health and Safety Requirements

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**P.1a(4) Assets**

What are your;

* Major facilities
* Equipment
* Technologies
* And intellectual property

**P.1a(5) Regulatory Environment**

What are your KEY;

* Occupational Health and Safety Regulations
* Accreditations
* Certifications or Registration Requirements
* Sector Industrial Standards
* Environmental, Financial and Product Regulations

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**P1b Organizational Relationships**

**P.1b(1) Organizational Structure**

* Leadership and Governance Structure
* What Structures and mechanisms make up the Leadership System
* Reporting relationships;
  + Among the governance board
  + Senior Leaders
  + Parent Organization

**P.1b(2) Customers and Stakeholders**

* Key Market Segments
* Key Customer Groups
* Key Stakeholder Groups
* What are Key Requirements and Expectations for your customer support services, and operations including differences amongst the groups

**P.1b(3) Suppliers, Partners and Collaborators**

* Key Suppliers
* Key Partners
* Key Collaborators
* Role in Producing and Delivering Your Customer Support Services and enhancing your competitiveness
* Role in implementing innovations
* What are your Key Supply-Network requirements?

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**P2 Organizational Situation: What is your organization’s strategic situation?**

**P.2(a) Competitive Environment**

1. Competitive Position – relative size and growth, how many and what types of competitors do you have?
2. Competitive Changes – what key changes affect your competitive situation, including changes that create *opportunity for Innovation and collaboration?*
3. Comparative Data – *Key sources of comparative and competitive data from within (and outside) your sector. What limitations affect your ability to obtain these data*

**P.2(b) Strategic Context**

* What are your KEY Strategic Challenges?
* What are your KEY Strategic Advantages?

**P.2(c) Performance Improvement System**

* What is your Performance Improvement System *- overarching systems approach might include Lean Enterprise system, Six Sigma Methodology, PDCA, decision science or employing other improvement tools.*
* What are your PROCESSES for Evaluation and Improvement of key Organizational Projects and Processes?

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