GSA IT Strategic Planning with the Balanced Scorecard

March 8, 2018
Our Approach

- **Engage Leadership**
  - Be present, be involved and be supportive in the process

- **Involve Customers and Employees**
  - Cross-functional teams of SMEs made up of different voices in the organization

- **Ensure a Balanced Approach**
  - View organization strategy from four different perspectives (customer, stewardship, internal processes, organizational growth)

- **Communicate Clearly**
  - Keep it simple – avoid vague words
  - Clear, concise, understandable
  - Tell the story of what we are trying to do

- **Put the Strategy into Action**
  - Avoid document becoming shelfware
  - Link performance at the organization, division and employee levels

"Tell me and I’ll forget, show me and I may remember, involve me and I’ll understand."

– Chinese Proverb
What is the Balanced Scorecard?

- **Kaplan-Norton**: Organizational Strategy is viewed through **Four Perspectives**
- Integrates **Strategic Planning** and **Performance Management** - linking long-term objectives with short-term actions
- **Perspectives** give managers and executives a more ‘balanced’ view of organizational performance
- Strategy is dependent on **internal** perspectives driving the success in **external** perspectives

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**PERSPECTIVES**

- **Customers**: How well are we meeting customer needs – through their eyes?
- **Stewardship**: How is strong stewardship and fiduciary responsibilities ensured for our customers?
- **Internal Processes**: How do we improve internal processes to deliver products and services better, faster and cheaper?
- **Organizational Growth**: How can the skills of our employees be improved?  
  What improvement in tools and infrastructure are needed?
How Do We Connect the IT Strategic Plan to Our People...

... so it doesn’t become shelfware?
## Strategic Planning Terms & Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Strategic Plan</td>
<td>Document used to communicate the organizational goals; and activities and actions needed to achieve those goals</td>
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<tr>
<td>Mission</td>
<td>The organization’s purpose described in the language of the business, including who is served and what products, programs and services are provided to customers and stakeholders</td>
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<tr>
<td>Vision</td>
<td>A vivid, emotionally inspiring, picture of a future to which the organization aspires</td>
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<tr>
<td>Strategic Goal</td>
<td>The strategic focus areas of the organization that defines organization’s business strategy</td>
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<td>Strategic Result</td>
<td>End outcomes from successfully executing the strategic goal</td>
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<td>Strategic Objective</td>
<td>The specific continuous improvement activities that breaks down the strategy into smaller components</td>
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<tr>
<td>Perspectives</td>
<td>The different lenses through which strategy and performance are viewed, typically financial/stewardship, customers, internal business processes and organizational growth</td>
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<tr>
<td>Strategic Metric</td>
<td>Key performance indicators that focus on accomplishments or impacts to the organization</td>
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<tr>
<td>Operational Metric</td>
<td>Performance indicators that tracks outputs, efficiencies, quality or timeliness needed to maintain day-to-day operations</td>
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<tr>
<td>Strategic Initiative</td>
<td>New or continuing projects and actions identified to improve the performance of one or more strategic objectives</td>
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The Process: Part 1 - GSA IT Development

Facilitated Strategy Sessions to Build Engagement

1. Vision Session (Leadership Team)
   - Assess IT Mission, Vision, and Strategic Goals

2. Goal Session (Leadership Team)
   - Refine our Strategic Goals
   - Identify Goal Themes + Objective Champions

3. Objective Sessions (Objective Teams = Directors + SMEs)
   - Define the Strategic Goal Results
   - Identify Strategic Objectives (for each Goal)
   - Identify Strategic Initiatives + Metrics

4. Metric Sessions (Measure Teams = Leads + SMEs)
   - Identify Strategic Metrics
   - Identify Operational (SLA) Metrics
   - Identify Strategic Initiatives

5. Initiative Session (Leadership Team + Directors)
   - Review all Strategic Initiatives
   - Prioritize Initiatives across fiscal years
Strategy Session Outcomes

**Facilitated**
5 Strategy Sessions

**Involved Participation from**
100% GSA IT Divisions

**GSA IT Leadership Sessions**
3 IT Visioning + 2 Strategic Initiative Reviews

**GSA IT Employees**
78

**Identified**
11 Strategic Objectives

**Operational Metrics**
42 IT Initiatives

**Defined**
11 Strategic Metrics

**Supported by**
42 Operational Metrics
Customer Engagement and Community Awareness

6. Customer Review Sessions (Leadership Team + Customers)
   - Socialize and validate IT Plan with Customers

7. GSA Strategic Plan Alignment
   - Validate alignment with the GSA Strategic Plan

8. Communication Strategy (GSA IT + OSC)
   - Collaborate with OSC to develop strategy to communicate the IT Strategic Plan to the GSA community
Cascading and linking performance measures creates **organizational alignment to IT strategy**
- **Accountability** by aligning clear, understandable objectives, measures and initiatives to individuals
- Employees understand how they contribute to the IT strategy
- Performance metrics are refined with organizational maturity
GSA IT Strategic Framework

IT VISION
To be recognized as a trusted partner and IT leader in the federal government

IT MISSION
To inspire and drive technology transformation by delivering innovative, collaborative and cost-effective IT solutions and services to our customers

STRATEGIC GOALS

OUR PEOPLE, OUR CULTURE

MISSION DELIVERY

STRENGTHEN CYBERSECURITY

OPERATIONAL EXCELLENCE

INNOVATION LEADER

STRATEGIC OBJECTIVES

G1.1. Improve Employee Engagement and Morale
G1.2. One GSA IT Culture
G1.3. Invest, Cultivate and Retain a High-Impact Workforce

G2.1. Improve Customer Experience and Satisfaction
G2.2. Partner with Customers to Deliver Quality IT Products and Services

G3.1. Improve Awareness and Understanding of Cybersecurity Compliance, Threats and Impacts
G3.2. Enhance Cybersecurity Controls and Tools

G4.1. Improve Management Processes to Streamline Day-to-Day Operations
G4.2. Strengthen Governance to Facilitate Decision-Making

G5.1. Invest in Innovation to Meet Current and Future Customer Needs
G5.2. Promote an Innovative Culture

STRATEGIC INITIATIVES

STRATEGIC METRICS

IT VISION
To be recognized as a trusted partner and IT leader in the federal government

IT MISSION
To inspire and drive technology transformation by delivering innovative, collaborative and cost-effective IT solutions and services to our customers

CORE VALUES
Accountability | Integrity | Teamwork | Customer Focus | Challenge & Integrate

STRATEGIC GOALS

OUR PEOPLE, OUR CULTURE

MISSION DELIVERY

STRENGTHEN CYBERSECURITY

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INNOVATION LEADER

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STRATEGIC INITIATIVES

STRATEGIC METRICS
GSA IT Balanced Scorecard

**PERSPECTIVES**

- **Customer**
  - CUSTOMER SATISFACTION INDEX
  - FAS IT VALUE SCORE
  - PBS IT VALUE SCORE
  - CORPORATE IT VALUE SCORE

- **Stewardship**
  - COST TRANSPARENCY INDEX

- **Internal Processes**
  - FITARA COMPLIANCE INDEX
  - CYBERSECURITY POSTURE INDEX
  - IT GOVERNANCE INDEX

- **Organizational Growth**
  - WORKFORCE ENGAGEMENT AND DEVELOPMENT INDEX
  - INNOVATION AND DATA ANALYTICS INDEX
GSA IT Performance Dashboard (D2D)

D2D.gsa.gov
What’s Next?
GSA IT Operating Plan

- Ensures IT Strategic Plan is executed for value to be realized
- Identifies *what* needs to be done for each Strategic Initiative
- Delegates accountability to assigned owners of objectives, initiatives or measures
- Monitors and tracks key initiatives to support the IT Strategic Plan

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<tr>
<th>Strategic Plan vs. Operating Plan</th>
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<tr>
<td><strong>Long-Term Focus (3 years)</strong></td>
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<td>Organizational-wide strategy</td>
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<td>Outcome oriented</td>
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<tr>
<td>Decisions have long-term impact</td>
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<tr>
<td>High-Level strategic elements (e.g. Strategic Initiatives)</td>
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Questions?