



710 E. Main Street, Lexington, KY 40502
www.kycpe.org KyCPE1@gmail.com

March 2021 Newsletter: Strategy Development

President's March Message

Greetings Friends!

It's March. That means spring is just weeks away. Yippee! Sorry if you're a winter lover and don't share my enthusiasm, but I'm a fair-weather fan and can't wait for Mother Nature to wake up our flowers and wildlife. 😊

Now down to business. This month and next we are focusing on Strategy. Eric will give you lots of solid advice on strategy development in his Pro Tip below. Part of strategy development is strategic objectives which is what I will unfold just a bit.

What are your key strategic objectives? It is NOT a list of *everything* you do as an organization. We're talking KEY STRATEGIC OBJECTIVES here. These

objectives are based on the products and services you offer your customers which make you the business you are. As Pastor Bruce Herwig says, “if everything is a focus, nothing is a focus.” Know what’s really important versus what you do to keep your organization running, thus, operational.

How do your strategic objectives achieve appropriate balance among varying and potentially competing organizational needs? This isn’t as complicated as it may sound. It’s a matter of knowing what you do that is core to your business, which of those things you do particularly well (strategic advantages) and which things you need to improve (strategic opportunities). What can you leverage as a quick win and what will take longer to achieve? And finally, what do your stakeholders require? Yes, it’s a lot to consider, but it’s not all that complicated if you are monitoring your outcomes. And isn’t that what the journey toward excellence is all about?

Don’t forget to move your clocks forward on March 14. Happy Spring!

Karen Dodd, PMP
KyCPE President

Mark your calendar!

March 17, 4 p.m. ET- Webinar hosted by Doug Serrano and Denise Haynes of Quiet Excellence - Don't Just Correct an Issue...Take a Corrective Action

April 12-15 - Virtual Quest for Excellence Conference, details below

April 21, 4 p.m. ET- Webinar hosted by Doug Serrano and Denise Haynes of Quiet Excellence - The 2021-2022 Baldrige Framework Update: The Concepts, the Details and the Leftover Challenges



Meet Justin Tillery, the newest appointment to the KyCPE Executive Board of Directors. Justin looks forward to promoting the Baldrige Excellence Framework in Kentucky and contributing to the organization using his experience in the fields of business management and construction technology consulting.

Justin has held leadership roles throughout the country within top fortune global 500 corporations such as KONE, ThyssenKrupp, Siemens and currently Johnson Controls where his focus on quality and performance has produced significant financial business results. His business passions include Leadership in Energy and Environmental Design (LEED) concepts including Building Information Modeling (BIM) and quality efficiencies surrounding lean construction processes.

Justin's alma mater is The University of Oklahoma for which he proudly supports the Sooners.

He and his wife, Heather, have resided in the Louisville, Kentucky area since 2017 and have 2 young children between the ages of 3 and 6. When he isn't busy spending time with his kids he enjoys soccer, riding his road bike, and hiking trails in the nearby Smoky Mountains.

**Don't just correct
an issue...
Take corrective
action!**

Learn how to work S.M.A.R.T.E.R, not harder this month with special Quiet Excellence guests Denise Haynes and Doug Serrano!

March Webinar - Mar. 17, 4-5:30 p.m. ET

Denise Haynes

For more than 30 years, Denise has been improving health care – from the personal experience of the individual patient in her care at the moment, through the organizational provider level, to enhancing health care efficiency and effectiveness at the state and national levels.

Her expertise propelled her into various administrative roles – including clinical leadership, quality, staff development, and executive roles in strategic planning, revenue cycle management, and corporate compliance. Denise is a highly acclaimed trainer who has facilitated the Baldrige Board of Examiner training at the national level on numerous occasions, and she travels across the country providing training and facilitating improvements based on quality principles including Lean, Six Sigma, Appreciative Inquiry, and IDEALS. Denise continues to work as a staff nurse in a busy Intensive Care Unit (ICU), both for the love of patient care, and to remain grounded in the realities of the patient and workforce experience.

Doug Serrano

A retired US Army Colonel, Doug now serves our country through helping organizations improve and attain performance excellence. As a commanding officer, Doug led the efforts of the first Government organization to ever win the Gold-Level "Eureka" Award from the California Awards for Performance Excellence (Baldrige-based) program.

While assigned to The Pentagon, he initiated the actions that created the US Army's Performance Excellence Award, based on the Baldrige Criteria. Since his military retirement, Doug has worked with organizations in all sectors and sizes to improve their performance through the use of the Baldrige Criteria. As a highly effective and light-hearted trainer and facilitator, he has led strategic planning, leadership development, and process improvement activities in a variety of award-winning organizations. Doug's diverse history of Baldrige-based roles and experience, with over 12 years' service on the Baldrige Board of Examiners; years of service as a judge for multiple Baldrige-based award programs; executive leadership of an award-winning applicant; program administrator; and now consultant, provides Doug with a perspective of the

Baldrige Program that no one else shares.

Don't Just Correct an Issue...Take a Corrective Action!

This session is designed to help participants move beyond “fire-fighting” (reactive) responses to adverse events toward “fire-prevention” (proactive) activities. At the conclusion of this session, participants will be able to:

- Compare and contrast making a correction versus taking a corrective action.
- Utilize a S.M.A.R.T.E.R. format for planning a corrective action.
- Create a compelling case to commit resources to implement a corrective action, rather than simply making a correction.

[Register on KyCPE's Website](#)

HQ Updates

Every two years the national program updates the Baldrige Framework to reflect leading edge best practice leadership and management methods. The 2021-22 frameworks are available now on the [Baldrige Website Publications page](#). Hard copy and PDF versions are available for purchase.

KyCPE examiners, judges, board members and volunteers may request a free PDF copy from [Dean Bondhus](#).

Quest for Excellence Conference

If you're in for a day of 'Excellence' events, mark your calendar for **Monday, April 12 - Thursday, April 15** and register using the link below for the **Virtual Quest for Excellence Conference**. This is a tremendous opportunity to learn from best practice experts.

Register today to take advantage of the advance discount rate. Sessions will be presented live and recorded for on-demand viewing after the event.

Conference Registration (click image below):



Pro Tip - Strategy Development

by Eric-Stephan Neill

I should have recused myself from the topic of strategy development, as I have been known to rant about it and how it is applied throughout our organizations. However, I will exercise restraint and not get on my soapbox this month. Baldrige does not get into the specifics of strategy development other than to challenge organizations to think on HOW they develop strategic objectives and action plans.

First, HOW do you conduct your strategic planning? This really is asking to validate that you do have a repeatable process that addresses the organization's needs. It does not address a cadence, but cadence is where we often short-change strategy development.

Some organizations hold annual strategy planning sessions – as if the strategy is a one year operational or tactical plan. More mature organizations may keep a strategic plan for as long as it aligns with the organization’s mission, vision, values (MVV). In this case, holding periodic (think every 12-18 months) alignment reviews. Consistency in strategy, where prudent and reasonable, provides smoother sailing of the competitive markets and provides less churn and change fatigue among associates, suppliers, customers and other stakeholders. A reasonable and active review cadence to ensure alignment provides the necessary guardrails to keep the organization moving in the decided direction.

Second, Baldrige moves on to question HOW the strategic development enables innovation. Interestingly, this question isn’t limited to products and services. The question allows organizations to explore how they encourage innovation in organizational structure, customer relations, process improvements and any other categories. This holistic approach to innovation encourages organizations to look at the strategic development processes. Never limit yourself to product or service innovation only – the markets and constituencies may well move on – just ask brick and mortar stores about the interruption of internet shopping.

Third, Baldrige challenges organizations to think and articulate their methods and approaches to collecting and analyzing data to develop approaches to determine strategic advantages and challenges AND to understand potential blind spots the organization may have in its processes. Many organizations are data rich and information poor. A good data scientist or someone with clarity in analytical skills is most helpful here.

Fourth, what work systems and core competencies exist, and which may need to be augmented, outsourced, dropped etc.? There are only so many core competencies an organization may have and leverage. Focus on discovering and understanding those. Leverage them. Promote them. Subjugate other

competencies that are not core but only adjacencies. There often are hard decisions to be made here. Baldrige does not prescribe, but rather challenges organizations to think on HOW these items relate to strategic objectives, opportunities and challenges in a systematic approach.

When it comes to Strategy Development, competing interests often get in the way, and only through a solid approach foundation can those be overcome consistently and effectively to improve your organization. Happy strategic development effort!

KyCPE Service Opportunity

KyCPE is actively recruiting committee members. We are specifically looking for volunteers interested in customer relationship management, human resource development, and applicant/examiner services. If you are interested in a committee appointment, please contact the chair of the Human Resource Development Committee, Bob Gardner at Gardner0711@outlook.com or 859-806-9501.



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