



Gaining Traction Toward Organizational Excellence

[This is usually the time when an organization begins to work with a Baldrige-based consultancy, like Pursuit of Excellence.]

Step 1: Initial Assessments/Discovery Session

- **Initial Assessments** - evaluates and profiles the current state
- **Discovery Session** - begins with the senior leaders, and focuses on a high-level overview of the organization, category items, and key results.

Step 2: Creating a Path to Excellence Work Plan

- **Creating the Work Plan** - begins with sharing organizational knowledge of Baldrige with senior leaders, including criteria definitions and elements. The resulting Work Plan reflects anticipated milestones and timelines for progress toward the organization's goals.
- **Identifying Champions** - internal champions are identified to execute progress on the Work Plan. Usually senior leaders serve as category leads or key work process leaders in their areas of responsibility.

Step 3: Implementing the Path to Excellence Work Plan

- **Implementing the Work Plan** - the high-level work team advances organizational progress toward milestones on the work plan, through a combination in in-person and virtual coaching sessions.
- **Identify Key Processes** - consistent implementation of key work processes yields high performance results. Efforts to understand, evaluate and improve these are foundational to making progress.
- **Evaluate Key Results** - the outcomes of consistent work processes are high performance level results in measures of importance. Early stage results are usually not at those levels, yet guidance in how to move these forward accelerates organizational maturity.

Step 4: Systematic Process Improvement/Brief Application

- **External Evaluation** - submission of an application package is recommended at key stages of progress toward excellence. The first stage is an Organizational Profile and high-level results application.
- **Feedback Report** - at each stage of submitting an application, a Feedback Report is received; used to update the Work Plan for cycles of improvement.
- **Category Teams** - as the organization matures in Baldrige, preparation for a full application involves assembling a category team for each of the major item categories of the Baldrige Criteria. These teams serve to advance key processes and results in their respective criteria.
- **Focused Educational Sessions** - as the organization matures, focused education and process improvement sessions help to expedite progress toward milestones.
- **Key Work Processes/Results** - systematic cycles of evaluation and improvement occur within category teams and cross-cutting at senior leadership level.

Step 5: Preparing for a Full Application Submission

- **Updated Work Plan** - the Work Plan is updated to reflect a plan to submit a full application, usually a year before the due date for submission.
- **Application Writing** - a full application is 50 pages of dense content, led by 5 pages of an Organizational Profile. There are many nuances to capturing an effective, high-quality application, especially the first time. Using a consultant to either author or edit is both a significant time-savings, and also yields a much higher quality application.
- **Site Visit** - following the team's evaluation of the application, there may be a site visit to validate the items captured in the application. Having a consultant help prepare and guide this enables better outcomes.
- **Feedback Report** - following the application submission, analysis, and site visit, a feedback report is submitted. This provides a comprehensive view of the organization's progress toward excellence, by category.
- **Recognition** - once a full award application is evaluated, a level of award recognition is identified, and often a celebration event for the organization. If the recognition is at the top of the state program level (*Excellence* usually), then the applicant can submit for the Baldrige level.
- **Cycles of Process Learning & Improvement** - the feedback report results are used to update the work plan, and the cycle of process refinement continues.

Step 6: Cycles of Progressive Improvement/Applications

- **Updated Work Plan** - each time a Feedback Report is received, the work plan is focused and updated.
- **Category Team Maturity** - category team functions, processes and results continue to advance in maturity.
- **Benchmark Levels** - as results are improving, comparison of results to best practice benchmarks emerges. Identifying key in-process and outcome measures, and top performing benchmarks is essential to further results improvement.
- **Innovation/Intelligent Risk** - processes to integrate innovation and intelligent risk are among many cross-cutting work processes developed.
- **Application Submissions** - an updated application should be submitted at least every other year, to maintain an improvement focus.
- **Feedback Reports/Recognition** - as cycles of improvement continue, higher levels of performance are evident until the organization achieves *Excellence* level recognition at the state program.

Step 7: Submission of a Baldrige Performance Excellence Program Application

- **Updated Work Plan** - review and update key work processes based upon Feedback Report
- **Integrated Key Processes** - focus is upon ensuring consistent deployment of key processes across the organization, getting additional benefit from systematic integration and performance results.
- **High Performance Results** - results in most areas are now approaching top decile levels and are sustained over three or more years.
- **Application Submission** - a high-quality 50-page application that includes dense content, process diagrams, tables, and result graphs.
- **Feedback Report/Recognition** - cycles of feedback, process improvement, and results refinement continue until the organization achieves world class level performance as a Baldrige Recipient.

Step 8: Baldrige Performance Excellence Recognition!

- **Recognition Ceremony** - at the Quest for Excellence conference, recipient organizations are asked to present in an area of strength.
- **PR/Marketing** - as a national Baldrige Recipient, recognition and a copy of the application summary are posted on the Baldrige website. Multiple opportunities to share educational session content are requested.

The journey continues...