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| [Organisation Logo] |
| [Organisation Name] |
| **T414 – The Organisational Comparison Tool… How Do We Compare Against Our Competitors & The Market?** |
| **Board Strategic Planning Tools** |

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| **Tool:** | This is The Organisational Comparison Tool…How Do We Compare Against Our Competitors & The Market? |
| **Purpose:** | This Tool can be used by the Board, Chief Executive Officer and/or Executive Team/Senior Management Team to assess how the organisation compares against its competitors and the wider marketplace/industry/sector in which it operates (Purpose). |
| **Instructions:** | 1. Check the organisation’s name and logo have been filled in throughout the Tool. 2. Provide the Tool to each person prior to the workshop, meeting or similar such event, with a deadline for the return of the Tool to a nominated person. 3. Each person should review the example on page 3, then complete the tool. There is no one right answer; the collated answers/positions of each person provide a start point for strategic reflection and discussion, possibly resulting in a strategic decision regarding the organisation. The strategic conversation about where the organisation is really at is what is important. 4. Prior to a discussion on the results of the Tool have a nominated person compile the answers into a single document capturing the range of answers provided by each person. This complied document is then provided to each person giving them an overview of the range of answers supplied and further informing the discussion on the results of the Tool. 5. This Tool can be used on an annual basis or as needs basis; it is typically used at strategic review or strategic planning workshops, meetings or similar such events. |
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| **Further Information:** | Michael Goldsworthy Principal Consultant Australian Strategic Services Pty Ltd Tel: 03 5429 6331 Mob: 0418 130 581 Email: [office@asspl.com.au](mailto:office@asspl.com.au) Web: [www.asspl.com.au](http://www.asspl.com.au)  Additional tools and resources to assist your Board, Chief Executive Officer or senior managers are available on the resources section of the Better Boards Australasia website <http://resources.betterboards.net/>. |

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| **Differentiator One: Organisational Platform *Compared to our competitors, do we have a distinctive organisational platform as evidenced by:***   * truly distinctive vision, mission, values, core business and philosophical statements, or similar statements, which are aligned and provide a unique and inspiring organisational platform * the philosophical statement, its principles and associated elements which are extensively documented, acting as a framework for professional development of the board, chief executive officer, executives/senior management team, staff and volunteers, a guide for individual, team and organisational attitudes and behaviours * the use of our organisational platform as the basis of our current or emerging/future business model? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Two: Unique Business Model *Compared to our competitors, does our organisation have a unique business model as evidenced by:***   * a unique business model that sets the organisation apart from its competitors and the market, or is our business model, in reality, traditional and like so many other similar organisations, which are struggling to re-engineer their existing business model * a new business model that has been comprehensively researched and documented? It will be well understood and will be implemented by the board, chief executive officer and executives/senior management team * a new business model that can be consistently described by each leader of the organisation? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Three: Customer Engagement & Satisfaction *Compared to our competitors, do we have significant customer engagement as evidenced by:***   * an extremely high level of customer engagement and customer satisfaction, substantiated by independent third party surveys or reports which may or may not be industry benchmarked * a widely held understanding that repeat and referral business is the most powerful and least costly form of marketing, whereby existing customers are maintained and they help generate new customers * a customer framework which describes the customer requirements, customer journey, customer experience & customer responses or a similar such framework? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Four: Intellectual Capital/Capability *Compared to our competitors, do we have significant intellectual capital/capability as evidenced by:***   * the combination of internal leaders and specialists and external advisors and consultants who provide significant intellectual capital and capability in the organisation, enabling the development and deployment of strategy, projects and innovations * the board, chief executive officer, executives/senior management team, advisors and consultants providing significant and measurable value and benefit, acting as a united team, initiating strategies and propelling projects contained in the strategic plan? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |

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| **Differentiator Five: Industry Insights/Business Intelligence *Compared to our competitors, does the board, chief executive officer, executives/senior management team have strategic insights/business intelligence of the current & emerging industry landscape as evidenced by:***   * intuitive or specific industry insights and business intelligence supporting our strategic thinking, strategic discussion and strategic decisions and/or organisational equivalents * executives and staff contributing to industry/sector insights and business intelligence that is captured and ultimately translated into the strategies contained in the strategic plan? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Six: Integrated & Cross Referring Services *Compared to our competitors, does our organisation have integrated & cross-referring services as evidenced by:***   * services that are not siloed but integrated, services that are cross-referring and synergistic, services that provide service options and service pathways for customers * an integrated service approach that enables executives and staff to not only strongly promote the inter-relationships and connectivity of all services, but the synergistic ideas for improvement, opportunities and service/business development strategies or projects? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Seven: Tender & Submission Win Rates *Compared to our competitors, does our organisation have high tender &/or submission win rates as evidenced by:***   * the organisation’s tender or submission application & win rate/volume per unit of time is consistent or, more importantly, increasing over time, reflected in the growth of our services, the growth of our cashflow & our balance sheet * industry or government department tender or submission data & information indicate the organisation is in the top quartile of all winning organisations either at a state or national level? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Eight: Integrated Information, Communication & Technology/Systems *Compared to our competitors, does our organisation have integrated ICT/systems as evidenced by:***   * the organisation’s governance, organisational & operational systems are supported by the necessary hardware, providing an integrated approach to the provision of data, information & knowledge that is accurate, informative & timely, and enables the board, chief executive officer, executives/senior management team to make informed decisions * the majority of the organisation’s governance, organisational & operational systems are software based, not stand-alone files, not on a multitude of servers or similar hardware, or are not hard files (paper)? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |

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| **Differentiator Nine: Excellent Strategy, Structure, Systems & Services *Compared to our competitors, is our organisation founded on excellent strategy, excellent structure, excellent systems & excellent services as evidenced by:***   * services built upon exemplary vision, mission, values, core business & philosophical statements * an excellent documented strategy/Strategic Plan, one that is not in any way operationally focused * one integrated governance & organisational structure therein entities & key positions * fully or nearly fully integrated, contemporary organisational systems & exemplary services * such a framework ensures leaders adopt an organisational wide perspective, not just a service perspective? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Ten: Sequential Strategy *Compared to our competitors, does the board sequentially develop our strategies as evidenced by:***   * each strategy/Strategic Plan that is seriously developed, driven & delivered * each strategy/Strategic Plan that is sequentially linked & contributes to the next Strategic Plan * no Strategic Plan or its strategies therein stand in isolation from the next Strategic Plan. * the organisation having a comprehensive & integrated Strategic Planning System that enables planning, implementation, monitoring & reviewing via strategic & business planning tools, packages & processes. | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Eleven: Leadership Team *Compared to our competitors, do we operate as a leadership team as evidenced by:***   * the board, chief executive officer & executives/senior managers operating as a united & strategic leadership team; coming together for Board meetings, strategic review & planning workshops & similar such events * the board, chief executive officer & executives/senior managers recognising their respective roles & responsibilities. * when operating, the leadership team adds significant value & benefit, eg: when they are focused on the strategic/organisational challenges & opportunities, & are able to develop major strategies, projects, ideas or solutions. | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Twelve: Board Governs The Organisation, CEO Manages The Organisation *Compared to our competitors, does our Board govern, Managers manage as evidenced by:***   * the board governing the organisation, whilst the chief executive officer manages the organisation, a solid & collaborative partnership in the leadership & management of the organisation * the practical application of contemporary governance principles & practices that can be evidenced not just in practices & processes, but also in relevant governance documentation. * the board having & applying a contemporary governance system, not just a director’s manual; principles, policies, procedures, tools, templates & documents, eg: TAGS™, the Australian Governance System? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |

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| **Differentiator Thirteen: Learning Organisation, Professional Development *Compared to our competitors, do we operate as a learning organisation, do we adequately resource professional development as evidenced by:***   * a learning organisation wherein the professional development of individuals & teams is founded on a well designed, structured & sequential governance, organisational & service learning frameworks, processes & content, against annual board, leadership & staff assessments/reviews * annual board professional development, leadership development & staff development plans that are documented & can be provided, along with the evidence of actual training & development activities? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Fourteen: Beyond Compliance & Quality; The Journey To Service/Business Excellence *Compared to our competitors, is our organisation beyond compliance/quality as evidenced by:***   * whilst our organisation meets all required minimum industry/government standards or quality systems & has the necessary accreditations or registrations at governance, organisational & service levels, our organisation has additional accreditation & registrations, eg: ISO9001, Business Excellence Framework * the journey toward business excellence is taking the organisation beyond minimum industry/government standards or quality systems; remembering that standards are minimum, every organisation needs to meet them & they do not given an organisation a competitive advantage, eg: Business Excellence, Best Practice or similar frameworks are exemplary. | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Fifteen: Targetted & Mutually Advantageous Partnerships Or Alliances *Compared to our competitors, does our organisation have targeted & mutually advantageous partnerships or alliances as evidenced by:***   * partnership or alliance agreements are formally documented & aligned to & contribute to the achievement of specific strategies/strategic projects contained within the organisation’s Strategic Plan * formally documented partnership & alliance agreements are annually reviewed by relevant parties for the value & benefit they provide to each organisation * specific projects or initiatives that have actually been delivered or in the process of being developed? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Sixteen: Organisational-wide Performance Management *Compared to our competitors does the board make informed decisions that are based on an organisational-wide performance management system & associated processes as evidenced by:***   * the board receiving timely & accurate data & information, against agreed categories of measurement such as finance, quality, strategy, culture & therein the various targets & metrics/key performance indicators * the leaders of the organisation making informed, strategic, organisational & operational decisions, based on the cumulative results & trends of various targets & metrics/key performance indicators * the organisation operating an organisational-wide performance management system? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |

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| **Differentiator Seventeen: Financial Resources, Balance Sheet Strengths *Compared to our competitors, does our organisation have adequate financial resources &/or enough balance sheet strength to resource our various capital intensive strategies & projects as evidenced by:***   * the strength of our balance sheet & the ability &/or opportunity to use/leverage this balance sheet to enable the strategic growth & development of the organisation & its services, eg: new facilities projects & ideas * our organisation not just having an annual budget but a robust integrated financial model that is aligned to our current & emerging service/business model; therein actual & projected cashflow, profit & loss & balance sheet against organisational targets & metrics, as well as industry benchmarks? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Eighteen: Service Profitability, Organisational Sustainability *Compared to our competitors, are our services profitable & is our organisational sustainable as evidenced by:***   * all of the organisation’s services are viable & profitable in their own right, no services are cross-subsidised, no clients are over serviced & staff utilisation time is 85–90% billable activity, eg: NDIS, home care * the organisation is profitable, holds substantial reserves/investments/assets & is financially sustainable * the organisation’s financial performance against industry/national/international accounting standards, metrics &/or benchmarks? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Nineteen: Funding The Gap, Funding The Unfundable *Compared to our competitors, are we “funding the gap, funding the unfundable” as evidenced by:***   * the organisation’s capacity & capability to “fund the gap, fund the unfundable” in service development or service delivery projects, be they focused on individuals, families, communities or regions * the organisation’s ability to fund the unfundable strategies or projects at a strategic or organisational level, eg: facilities, innovation projects, major opportunities * specific governance &/or organisational policies & procedures that support “funding the gap, funding the unfundables”? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Twenty: Mission Mode, Maintenance Mode Or Muddling Mode *Compared to our competitors, is our organisation in mission mode (growth & development), maintenance mode (remaining much the same) or muddling mode (heading downward) as evidenced by:***   * the organisation consistently, over time, being in mission mode, eg: investigating & researching ideas & opportunities, growing existing &/or developing new services, initiating projects & innovations * by all or many measures the organisation can clearly evidence it is in mission mode; as distinct from maintenance mode, where the organisation has remained much the same over time or in fact the organisation has gone into muddling mode, declining over time & may be even heading toward insolvency? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |

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| **Differentiator Twenty-one: Creative, Innovative & Entrepreneurial *Compared to our competitors, are we creative, innovative & entrepreneurial as evidenced by:***   * the organisation’s inherent cultural characteristics of creativity, innovation & entrepreneurship that help define & drive strategic, organisational or service ideas, opportunities, projects & initiatives * the board, chief executive officer &/or executive/senior management team’s ability to develop concepts, translate ideas & deliver distinctive, pre-eminent or niche/specialist services or products, not just receive government funding & deliver services * the Board, board, chief executive officer &/or executive/senior management team are not risk averse but drive a creative, innovative & entrepreneurial, attitude & approach to strategic, organisational & service development & delivery which is reflected in specific projects or initiatives? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Twenty-two: Unique Or Defining Culture, Attitudes & Behaviours *Compared to our competitors, does our organisation have unique or defining cultural attitudes & behaviours as evidenced by:***   * individual, team or organisational work practices that are significantly aligned to the organisation’s vision, mission, values, core business & philosophical statements? * individual, team or organisational work practices that are significantly aligned to the organisation’s agreed strategies & projects contained in the Strategic Plan? * independent/third party cultural surveys or similar such review & measurement approaches? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Twenty-three: Economic, Community & Regional Development *Compared to our competitors, does our board, chief executive officer & executives/senior management team operate in a framework of economic development, community development & regional development as evidenced by:***   * over & above normal service delivery, the leadership team (board, chief executive officer & executives/senior managers) understand & can demonstrate through various frameworks, projects or services that the organisation engages with & contributes to: the economic development, community development &/or regional development of the communities or regions in which the organisation operates * governance &/or organisational economic, community & regional development policies & procedures? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **Differentiator Twenty-four: Geographic Spread, Service Spread *Compared to our competitors, our geographic spread & service spread is of sufficient size/economies of scale to ensure our organisational sustainability as evidenced by:***   * the geographic & service spread of the organisation & its various services, whether it is national, multi-state, state or regional, is of sufficient size/economies of scale to ensure organisational sustainability in the current & emerging industry/sector environment in which the organisation operates * the cumulative results & trends of our annual profit & loss & balance sheet statements as against organisational targets & metrics, &/or industry benchmarks? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |

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| **Differentiator Twenty-five: International, National, State Or Regional Recognition *Compared to our competitors, our organisation is either internationally, nationally, state or regionally acknowledge & recognised as a leading organisation as evidenced by:***   * the organisation has consistently over time been acknowledged & recognised either internationally, nationally, state &/or regionally via industry, government or peak body awards or similar mechanisms * these awards have been used/leveraged to assist in winning tenders, submissions, grants, positioning or promoting the organisation or similar such activities? | **Don’t Know/ Unsure** | **Behind  Competitors** | **Meeting  Competitors** | **Ahead of  Competitors** | **Distinctive, Unique** |
| **INDIVIDUAL TOTAL SCORES**  If you are an individual using this Tool, add up the number of times you have answered for each *Don’t Know/Unsure, Behind Competitors, Meeting Competitors, Ahead of Competitors or Distinctive/Unique*. This can assist you to see where the bulk of your answers lie. | **Don’t Know/ Unsure**   |  | | --- | | **#**  **25** | | **Behind  Competitors**   |  | | --- | | **#**  **25** | | **Meeting  Competitors**   |  | | --- | | **#**  **25** | | **Ahead of  Competitors**   |  | | --- | | **#**  **25** | | **Distinctive, Unique**   |  | | --- | | **#**  **25** | |
| **GROUP TOTAL SCORES**  If you have collated the answers for a group into a single Tool, add up the number of times an answer has been given for each *Don’t Know/Unsure, Behind Competitors, Meeting Competitors, Ahead of Competitors or Distinctive/Unique*. This can assist you to see where the bulk of your answers lie as a group. | **Don’t Know/ Unsure**   |  | | --- | |  | | **Behind  Competitors**   |  | | --- | |  | | **Meeting  Competitors**   |  | | --- | |  | | **Ahead of  Competitors**   |  | | --- | |  | | **Distinctive, Unique**   |  | | --- | |  | |