



# Performance Optimization

Analysis Report

Created for [COMPANY NAME] on [DATE]

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# Overview

Optimizing the performance of your business is critical in creating an efficient and effective organization that supports the overall success of your business. Without a structured performance management system your business will struggle to achieve the vision, goals and objectives that you have for it.

The development and implementation of a structured performance management system in your business provides the operational framework and control to develop, execute and monitor the performance of your strategic plan.

It supports the obtainment of organizational objectives, manages your risk, and ensures you have optimized resources to execute business processes. As a result, your business is more efficient, streamline and agile to the changes in customer and market dynamics.

If structured correctly, your management system framework will create a culture of performance review and continuous improvement to drive your organization towards operational success.

# Purpose

You have taken a positive step towards optimizing the performance of your business. By undertaking a review of the efficiency and effectiveness of your performance management system and operational process you gain a clearer understanding of the factors that impact your ability to achieve the organizational goals that you have set for the business.

The purpose of this Performance Optimization Enterprise Analysis Report is to provide you with a detailed understanding of the areas of your performance management system that can be improved upon and the actions required to address them.

This report is designed to be the catalyst for performance improvement in your business and integrates in to the Action System Solution that provides the step by step process and framework to make an immediate impact to the success of your business.

# Scope

This Performance Optimization Enterprise Analysis Report analyses the key foundational areas of an organization's performance management system framework: Strategic Planning, Controlled Execution and Performance Management.

The scope of this Report is as follows:

**Overall Performance Optimization Results** – The high-level results for each of the three key areas your performance management system are highlighted with supporting details of where the business currently stands and where it needs to go.

**Strategic Planning** – This section focuses on the extent that the business has developed a functioning strategic planning process highlighting the impact current impact of its mission and vision, the degree that risk is managed in the business and how objectives and targets are defined and set.

**Controlled Execution** – This section focuses on how well the business is controlling the execution of their operations, targeting the extent of process and procedural development, how documents and data are being managed and the efficiency of communication protocols and action tracking.

**Performance Management** – This section focuses on the extent that the business manages performance in the business highlighting the extent that Key Performance Indicators and analysis is being utilized, the role of corrective and preventative actions, and how auditing of the management system is being employed to drive continuous improvement.

**Critical Improvement Initiatives** - The three sections that need to be immediately addressed to optimize the performance of your business and drive your organizational success are defined, providing an understanding of how they negatively impact the performance of your business.

## Strategic Planning

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## Controlled Execution

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## Performance Management

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# Your overall Performance Optimization Score

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# Strategic Planning

Strategic planning plays a pivotal role in the success of your business. The strategic planning process enables you to document and establish the direction of your organization. It is used to outline the mission and vision of the business, assess potential risks, set defined objectives, and outline the management structure and action plans required to execute.

Setting a clear plan of action for the business enables the organization to work towards a collective goal in a systematic and structured way. This integration of effort fosters a cohesive culture of order and discipline that allows for clear understanding of where the organization currently stands and where it wants to go.

## Vision, Mission & Innovation

Communicating your commitment to the mission and vision of the organization is an essential component to the strategic planning process. It provides the high-level direction and guidance for your employees, outlining what is expected of them.

Setting a clear and concise message to the organization instils a confidence throughout the business that there is a common purpose and goal to achieve.

Placing innovation as a core element of the strategic planning process motivates the organization to identify ways to improve existing products/services, processes and systems to drive the performance of the business and prepare it to take advantage of changes in market or customer dynamics.

## Risk Management

Establishing a systematic risk management program is essential for ensuring that opportunities are leveraged and risks are appropriately managed to reduce potential adversity.

It is imperative that organizational risks are identified and analysed with relevant impact assessments and mitigation strategies developed. Understanding the risks to the success of your business is important in shaping your strategic plan in an agile and dynamic way.

Prioritizing those risks that pose the greatest threat to your business and assigning appropriate resources to handle them provides an added level of insurance that your strategic plan will be successful.

## Objectives & Targets

Setting SMART Objectives helps you to define the steps needed to achieve the organizational vision and mission of your business. They provide the focus of your strategic plan and when communicate to your employees provides them with a clear understanding of what the business is trying to achieve.

It is important that your objectives are specific so that everyone can understand what they need to be focused on, can be measured to allow for identification of success or failure, are achievable in terms of your resources and finance, realistic so that they are credible, and have an associated timeframe.

Your business objectives need to be updated on a periodic basis and clearly communicated to your employees. It is important that you review your performance against these objectives and that they are set throughout the different departments and areas of your business.

# Controlled Execution

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Once you have established the strategic plan for your business it is critical that you have the management systems and processes in place to ensure controlled execution of that plan.

Business process management allows the organization to streamline business processes, removing inefficient or redundant tasks therefore increasing productivity and reducing costs. Standardisation of business processes improves quality control and speed of execution, enabling the organization to become more agile and meet the ever-changing demands of the customer and market.

## Operational Control

Operational Control systems provide the framework on which organizational policies, processes and procedures are built. Standardisation of business processes within the operational control system framework ensures consistency, quality, and the appropriate management of operations. Operational control reduces the risk of poor product/service delivery to customers and ensure operational efficiency and effectiveness.

A well planned and structured operational control system is independent of people. It provides a step by step process that when followed diligently will always provide the same result irrespective of the individual who performs them.

To support operational control, the development of structured action systems is required to ensure that tasks are assigned, tracked, and completed. This facilitates transparent accountability of employees and ensures that everybody is driven to support the collective obtainment of organizational goals and objectives.

## Document & Data Control

Management of documentation and control of data is an essential component of efficient execution of business processes. Establishing a Document & Data Control Program and Electronic Document Management System (EDMS) defines a standard methodology for the management, control, storage and retention of operational documents and records. This is important as it provides identification and traceability of operational related information, control of document and data changes and revision status, and prevents loss or unintentional use of information.

Additionally, it protects the confidentiality, authenticity, and integrity of information, provides efficient storage, retrieval and archiving of operational records and prevents access by unauthorized parties.

## Communication Management

Effective, planned, and transparent communication plays an important role at every level of the organization and facilitates the achievement of organizational goals. Establishing an internal communications program and platform is critical in defining clear, concise, and accurate messages and actions.

Promoting a working environment in which employees have a clear understanding of expectations and deadlines as well as the freedom to proactively contribute ideas to the improvement of the organization will help to drive a motivated workforce. Integrating communication into business processes further strengthens its effectiveness and impact.

Cross departmental communication is crucial in ensuring that all employees are focused on the collective goal of the business

# Performance Management

The aim of Performance Management is to create an organizational culture whereby individuals and teams take responsibility for continual business process and performance improvement. It is focused on ensuring the goals and objectives of the organization are achieved and that employees are held accountable for their responsibilities and actions. Performance management is a cyclical and continuous process that tracks, reviews, and reports on the progress of the organization.

## KPIs & Analysis

Performance monitoring through utilization of KPIs is the systematic collection and analysis of data on a pre-defined periodic basis to track the performance of the organization against its objectives.

It is used to support the strategic planning and decision-making processes of the organization and can be beneficial in questioning and testing assumptions. By analysing why and why not organizational objectives were achieved, lessons can be learned and implemented to ensure continual improvement of performance.

By implementing a performance monitoring and analysis program your business can identify and review key performance indicators in a transparent way that enables individuals to be held accountable for their role and actions.

## Corrective & Preventative Action

A functioning Corrective & Preventive Action System identifies and reports on conditions adverse to operational performance so that they can be corrected and prevent recurrence. Conditions adverse to operational performance can be identified through several means which can include performance reviews, employee concerns about internal activities or processes, client feedback and internal management system audits.

Corrective actions are performed to prevent recurrence and can include repetitive issues resulting from a common cause, a specific problem in a process that is being repeated because the corrective action taken has not identified or rectified the root cause, and a condition with actual or potentially significant consequences that needs to be addressed immediately.

Preventive actions are identified because of management reviews of trends and performance, and through employee observations of a situation that could potentially lead to the requirement of a corrective action in the future.

## Management System Auditing

Management System Audits are utilized to measure the effectiveness and efficiency of the management system in helping the organization to meet its performance objectives.

It is designed to help improve policies, processes, and procedures to determine if there are any corrective or preventive actions that could improve operational performance.

Auditing of the management system supports the development of a continual improvement environment that drives performance management and ultimately the success of the business.

# Critical Improvement Initiatives

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Based on the findings of this Performance Optimization Enterprise Analysis Report the 3 most critical areas that your business needs to address are:

## Critical Area 1

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## Critical Area 2

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## Critical Area 3

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**Now that you understand the critical areas that are impacting your business' ability to optimize its performance, it is imperative that you utilize the Action System Solution and follow the step by step process to change the dynamic of your business.**

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