

Appendix A: Milestones for Leading a Learning Organization

PHASE DESCRIPTION	AREA	MILESTONE DESCRIPTION
PHASE 1 – Evaluate Recognize the Need for a Learning Organization. Define the Supporting Structure Needed for a Learning Organization.	Purpose & Practical Values	Publish or evaluate Purpose Statement & Practical Values for the present and future.
	Processes System View	Develop a Conceptual View of the Organization as a System with Critical Processes Defined. Determine weak system links & relationships.
	Partner	Evaluate Perceived Partnership level by Customers & Suppliers. Determine Gaps.
	People	Evaluate skills and training needed for the present. Evaluate levels of Ethical and Moral reasoning current decisions & actions reflect for the Leadership Team and Managers.
	Products & Services	Evaluate current products & services and their alignment with the Purpose & Practical Values and Stakeholders needs.
	Results: Family of Measures	Evaluate current family of measures for gaps and ensure their alignment with the Purpose & Practical Values.
	Information Sources	Evaluate Information Sources (value, frequency, impact, timeliness) as an Aid to Foresight & define gaps.
	Vision: Idealized Design	Publish or evaluate current Vision as it relates to Purpose, Practical Values, Processes, People & Products & Services gaps.
	Strategic Planning	Evaluate the planning process, inputs and outcomes.
	Lead & Integrate Change	Evaluate the identification, prioritization, and selection of changes and methods used for improvement efforts.
Motivate & Align People	Evaluate Leadership Team and Managers Personality Intelligence gaps and their alignment with the Purpose & Practical Values.	
PHASE 2 – Integrate Learning into the Organization Develop & Test Structure to Support a Learning Organization	Purpose & Practical Values	Update, communicate and use the Purpose & Practical Values routinely and integrated into the hiring process.
	Processes System View	Create the idealized design. Develop & test remedies for weak or missing system links for the present and future. Develop or improve the supporting improvement subsystem.
	Partner	Develop and test the structure to achieve the partners needed to achieve the idealized design.

Appendix A: Milestones for Leading a Learning Organization

<p>PHASE 2 – Integrate Learning Structure into the Organization</p> <p>Develop & Test Structure to Support a Learning Organization</p>	People	Assess individual knowledge & skills, creating formal personnel development plans for present and future needs.
	Products & Services	Use stakeholder ideas and research to develop & test new or improve existing products & services to meet the Vision.
	Results: Family of Measures	Develop a nested & stratified family of measures graphically (for the organization, locations, departments and individual roles) to predict & interpret the impact of change throughout the organization.
	Information Sources	Develop, test and document information sources for the family of measures and strategic planning, including industry leading indicators.
	Vision: Idealized Design	Develop, define and communicate the idealized design (results & changes needed) to attain the results for the Vision. Utilize stakeholder feedback to refine.
	Strategic Planning	Develop or improve a proactive, integrated strategic planning process which charters, prioritizes and provides resources for running and improving the organization.
	Lead & Integrate Change	Leadership Team uses the Model for Improvement, Charters, PDSAs and Implementation Checklist to guide, facilitate, provide resources, ensure documentation and sustain improvement and learning. Results are tracked over time with a formal process designed to share and recognize learning and results (successes & failures).
	Motivate & Align People	<p>Prioritized improvement efforts are launched using draft charters from the leadership team. Team members and sponsors are trained and supported during projects.</p> <p>Location, departmental & employee roles are aligned with Purpose, Practical Values, Processes/System, Vision & supporting Family of Measures.</p> <p>Future leaders are identified with succession plans formalized.</p> <p>Formal education and training courses or assignments are developed and tested to meet the present and future needs of the organization.</p>

Appendix A: Milestones for Leading a Learning Organization

<p>PHASE 3 – Implement & Use Structure for the Learning Organization</p> <p>The Organization Outperforms Competition as they Routinely Learn, Develop and Influence Stakeholders with Leaders at all Levels, Internally & Externally</p>	Purpose & Practical Values	The Purpose & Practical Values guide everyday decision making.
	Processes System View	The Systems Map is used to Coordinate and Communicate Strategic Objectives, Improvement Efforts, Roles, Relationships and the Idealized Design throughout the organization.
	Partner	Key Customers & Suppliers are Strategic & Alliance partners. Resources are allocated to maintain and develop strong partners working for the good of the overall system.
	People	Personnel share in their developmental growth for the present & future. New technology integration is seamless with personnel. Contributions to the success of the organization is recognized throughout the organization.
	Products & Services	Products and services meet or exceed stakeholder expectations.
	Results: Family of Measures	A real time graphic, nested family of measures (for the organization, locations, departments and individual role) are used daily/routinely to predict and study the current condition and impact of changes throughout the System using analytic statistical signals throughout the organization.
	Information Sources	A comprehensive information system exists with timely analysis & synthesis which is used daily/routinely for decision making, planning and communication. These information sources are useful for strategic intelligence (assisting foresight and vision).
	Vision: Idealized Design	The Idealized Design guides behavior and strategy during development, testing and implementation of changes/improvement. The Idealized vision is realized. A new idealized design is created.
	Strategic Planning	Interactive planning with stakeholders are defined, linked within the organization and with strategic/alliance partners to implement the idealized design.
	Lead & Integrate Change	The impact of improvements is understood for the system and fits practical values. Improvement is linked to planning and other key business activities.

Appendix A: Milestones for Leading a Learning Organization

PHASE 3 – Implement & Use Structure for the Learning Organization	Lead & Integrate Change (cont'd)	The Improvement subsystem is integrated into the organization and regularly improved. Improvement is completely integrated into all aspects of operating and developing the business.
The Organization Outperforms Competition as they Routinely Learn, Develop and Influence Stakeholders with Leaders at all Levels, Internally & Externally	Motivate & Align People	Employee skills & roles are recognized and valued. The hiring and development processes reflect Purpose, Practical Values & Roles. Managers and employees routinely use all 5 R's to motivate. Leadership is exhibited at all levels of the organization.