

Talent Development 39 Framework for Data Analysis

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Section 3.7 in the CPTD Certification program for ATD is Data and Analysis. Section B reads “Skill in identifying stakeholder’s needs, goals, requirements, questions, and objectives to develop a framework and/or plan for data analysis.”

In this article, I will focus on how you can use the Strategic Planning process to create a template to measure progress against the

goals of the organization.

There are many variants of the strategic planning process. In this article I will outline the process I use with organizations to create a framework for data analysis. The process usually starts out with a SWOT Analysis.

SWOT Analysis

I normally split the group into four sub groups. One group will brainstorm the Strengths, and the other three will focus on Weaknesses, Opportunities, and Threats respectively. The idea is to quickly identify the key elements in each area. Strengths and Weaknesses are like looking at the organization through a microscope. Opportunities and Threats are like looking at the rest of the world through a telescope.

One technique I use to deepen the analysis is to give all four groups five to ten minutes to come up with their list. Then we reassemble the groups and share the lists. I then ask all four groups to go back and double the size of their list.

This technique forces participants to not just list the obvious items that are top-of-mind; they need to dig deeper to come up with some creative ways to view their world.

Purpose

Identifying the purpose of an organization is important. The purpose statement documents **why** we do what we do. The purpose is often confused with the mission. They are two different concepts. An example may help clarify the two concepts.

If you are working in a quarry, your **mission** would be to cut rock into large slabs. Your **purpose** would be to build a cathedral.

Vision

The vision is a statement of the ideal future state. Vision is most critical because it provides the driving force to move the organization forward. The vision tells us **where** we are going. It should be worded in the future tense.

Mission

The mission is a statement of **what** we are trying to accomplish today. The mission is worded in the present tense.

Values

The values document the foundational principles upon which we base all of our actions. The values allow us to test the **rightness** of any proposed action.

Behaviors

A documented set of behaviors gives the organization an agreement on how people treat each other. This is the basis for holding each other accountable.

Based upon the six key statements outlined above, we can now identify the few key strategies that will take our organization from the current state toward the vision.

Strategies

The strategies should be broad statements that are expressed succinctly. I recommend a set of five strategies for most organizations. Sometimes I will allow six, but the idea is to have a “handful” of key strategies that people can remember.

Strategies are short, specific statements aimed at moving an organization from where they are toward their vision.

Tactics

The list of tactics for each strategy is a collection of actions for how we are going to accomplish that strategy. Tactics should be action oriented, specific, and timebound.

Goals and Measures

This section identifies the specific goals that will identify a successful execution of the strategy. Measures are the tangible ways to measure progress against the goals.

Scorecard

You are now in a position to create a “scorecard” for the organization that will measure progress toward the organization’s vision. That data is the basis for analysis of performance because it ties back to a thorough analysis of business principles and objectives.

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