**Organization Performance Analysis Instrument**

Use the organizational performance analysis instrument to analyze a firm’s (1) mission, purpose, vision, and values, (2) financial position, (3) market position, (4) other quantitative data, and (5) balanced scorecard. You might not analyze all of these in every case analysis, so use the instrument to support the analysis you conduct. The goal is for the instrument to support your analysis, not to complete every element of the instrument.

**Mission, Purpose, Vision, and Values**

**Analyze mission, purpose, vision, and values.**

1. Identify whether the information involving mission, purpose, vision, and values is present.
   1. A mission statement explains why an organization exists, its role in society, and answers the core question “Who are we?”
   2. A firm’s purpose statement articulates its reason for existence beyond just profit-making.
   3. A vision statement is forward-looking or aspirational statement that captures what a company or organization wants to achieve in the long run.
   4. Value statements define the core principles that companies stand by and expect their employees to uphold.
2. Place the analysis in the instrument below.

**Interpret mission, purpose, vision, and values.**

1. Are the mission, purpose, vision, and values effective?
2. Is there a clear line of sight and congruence between and among the mission, purpose, vision, and values?
3. Place the interpretation in the instrument below.

**Make recommendations regarding the mission, purpose, vision, and values.**

1. If the mission, purpose, vision, and values are not effective or do not have a clear line of sight and congruence between and among them, what actions do you recommend the company take regarding its mission, purpose, vision, and values?
2. Place your recommendations in the instrument below.

**Financial Position**

**Analyze the firm’s financial position.**

1. Identify the financial measures you use to analyze the firm’s financial position.
2. Place the analysis in the instrument below.

**Interpret the firm’s financial position.**

1. What relationships exist in the financial analysis?
2. How does a measure support, explain, or contradict another measure?
3. What bigger picture/forecast does the total analysis give that an individual measure does not?

**Evaluate the firm’s financial position.**

1. How does the information in the analysis and interpretation impact the company?
2. How is the information in the analysis and interpretation relevant to the company?
3. In what ways is the information in the analysis and interpretation important to the company?
4. What are the company’s current, potential, or needed assets, organizational capacity, and managerial ability that may support or mitigate the areas of highest impact, relevance, and importance for the firm?
5. Place the evaluation in the instrument below.

**Make recommendations regarding the firm’s financial position.**

1. Based on your analysis, interpretation, and evaluation of the firm’s financial position, what actions do you recommend the company take regarding its financial position?
2. Place your recommendations in the instrument below.

**Market Position**

**Analyze the firm’s market position.**

1. Identify the measures you used to analyze the firm’s market position.
2. Place the analysis in the instrument below.

**Interpret the firm’s market position.**

1. What relationships exist in the market analysis?
2. How does a measure support, explain, or contradict another measure?
3. What bigger picture/forecast does the total analysis give that an individual measure does not?

**Evaluate the firm’s market position.**

1. How does the information in the analysis and interpretation impact the company?
2. How is the information in the analysis and interpretation relevant to the company?
3. In what ways is the information in the analysis and interpretation important to the company?
4. What are the company’s current, potential, or needed assets, organizational capacity, and managerial ability that may support or mitigate the areas of highest impact, relevance, and importance for the firm?
5. Place the evaluation in the instrument below.

**Make recommendations regarding the firm’s market position.**

1. Based on your analysis, interpretation, and evaluation of the firm’s market position, what actions do you recommend the company take regarding its market position?
2. Place your recommendations in the instrument below.

**Other Quantitative Measures**

**Analyze other quantitative measures.**

1. Identify the data and measures you used to analyze other quantitative measures.
2. Place the analysis in the instrument below.

**Interpret the other quantitative measures.**

1. What relationships exist in the other quantitative measures?
2. How does a measure support, explain, or contradict another measure?
3. What bigger picture/forecast does the total analysis give that an individual measure does not?

**Evaluate the other quantitative measures.**

1. How does the information in the analysis and interpretation impact the company?
2. How is the information in the analysis and interpretation relevant to the company?
3. In what ways is the information in the analysis and interpretation important to the company?
4. What are the company’s current, potential, or needed assets, organizational capacity, and managerial ability that may support or mitigate the areas of highest impact, relevance, and importance for the firm?
5. Place the evaluation in the instrument below.

**Make recommendations regarding the other quantitative measures.**

1. Based on your analysis, interpretation, and evaluation of the firm’s measures, what actions do you recommend the company take?
2. Place your recommendations regarding the other quantitative measures in the instrument below.

**Balanced Scorecard**

**Analyze the firm’s balanced scorecard.**

1. If there is additional information in the balanced scorecard about the firm’s financial measures, place this in your analysis of a firm’s financial position above. This keeps all the financial analysis together.
2. Analyze the firm’s customer measures.
   1. Customer measures assess how well a company attracts, satisfies, and retains customers. Customer measures include new customer acquisition rates, customer satisfaction scores, and repeat customer percentages.
3. Analyze the firm’s internal business process measures.
   1. Internal business process measures assess organizational efficiency. Internal business process measures include production times, delivery efficiency, and new product development speed.
4. Analyze the firm’s learning and growth measures.
   1. Learning and growth measures assess how an organization can continue to innovate and create future value. Learning and growth measures focus on employee development, innovation capabilities, and adaptation to changing market conditions.
5. Place the analysis in the instrument below.

**Interpret the balanced scorecard.**

1. What relationships exist in the balanced scorecard?
2. How does a measure support, explain, or contradict another measure?
3. What bigger picture/forecast does the total analysis give that an individual measure does not?
4. Is there clear line of sight and congruence between and among customer, internal business process, and learning and growth measures?

**Evaluate the balanced scorecard.**

1. How does the information in the analysis and interpretation impact the company?
2. How is the information in the analysis and interpretation relevant to the company?
3. In what ways is the information in the analysis and interpretation important to the company?
4. What are the company’s current, potential, or needed assets, organizational capacity, and managerial ability that may support or mitigate the areas of highest impact, relevance, and importance for the firm?
5. Place the evaluation in the instrument below.

**Make recommendations regarding the balanced scorecard.**

1. Based on your analysis, interpretation, and evaluation of the firm’s balanced scorecard, what actions do you recommend the company take?
2. Place your recommendations regarding the balanced scorecard in the instrument below.

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| **Organizational performance** | |
| **Mission, purpose, vision, and values** | |
| Analyze mission, purpose, vision, and values. | |
| Mission: |  |
| Purpose: |  |
| Vision: |  |
| Values: |  |
| Interpret mission, purpose, vision, and values. | |
| Interpretation: | |
| Evaluate mission, purpose, vision, and values. | |
| Evaluation: | |
| Make recommendations regarding mission, purpose, vision, and values. | |
| Recommendations: | |
| **Financial position** | |
| Analyze financial position. | |
| Analysis: | |
| Interpret financial position. | |
| Interpretation: | |
| Evaluate financial position. | |
| Evaluation: | |
| Make recommendations regarding financial position. | |
| Recommendations: | |
| **Market position** | |
| Analyze market position. | |
| Analysis: | |
| Interpret market position. | |
| Interpretation: | |
| Evaluate market position. | |
| Evaluation: | |
| Make recommendations regarding market position. | |
| Recommendations: | |
| **Other quantitative measures** | |
| Analyze other quantitative measures. | |
| Analysis: | |
| Interpret other quantitative measures. | |
| Interpretation: | |
| Evaluate other quantitative measures. | |
| Evaluation: | |
| Make recommendations regarding other quantitative measures. | |
| Recommendations: | |
| **Balanced scorecard** | |
| Analyze balanced scorecard. | |
| Customer measures: | |
| Internal business process measures: | |
| Learning and growth measures: | |
| Interpret balanced scorecard. | |
| Interpretation: | |
| Evaluate balanced scorecard. | |
| Evaluation: | |
| Make recommendations regarding balanced scorecard. | |
| Recommendations: | |