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Assessment 4 Instructions: Strategic Plan Objectives and Balanced Scorecard

Create and record a 10-12-slide, executive-level presentation with notes of the SMART objectives corresponding to these elements of an organization:

- Main strategies.
- Associated performance indicators and metrics.
- Strategic plan recommendations.

Note: Each assessment in this course builds upon the work you have completed in previous assessments. Therefore, you must complete the assessments in the order in which they are presented.

The successful implementation of a strategic plan requires effective communication and a thorough understanding of not only the role of the organization within the greater community, but also the role of leadership within the organization. By effectively engaging stakeholders and understanding the philosophy of strategic management, leaders can mitigate challenges and hurdles that face those directing change.

This assessment provides an opportunity for you to create an executive-level presentation explaining how SMART objectives underlying each organizational strategy can help the organization successfully implement its strategic plan. Then, after sharing the key performance indicators you developed from the strategic plan, you will use this balanced scorecard to make recommendations to revise the strategies you developed in Assessment 3.

By successfully completing this assessment, you will demonstrate your proficiency in the following course competencies and assessment criteria:

- Competency 1: Analyze organizational structure, design, culture, and climate in relation to environmental forces.
 - Analyze potential long-term opportunities and operational components in the strategic planning process.
- Competency 2: Develop a strategic organizational plan that provides human and financial resources to support targeted organizational outcomes.
 - Present operational recommendations and strategic control mechanisms, including goals, objectives, resources, and action steps.
 - Define critical success indicators that allow an organization to measure success in implementing a strategy.
 - Analyze the effect of strategy formulation on human, financial, and technical resources.
- Competency 3: Recommend an organizational structure and design to optimize a strategic plan.
 - Propose a strategic plan to optimize outcomes and mitigate risks in an organization.
- Competency 4: Communicate in a manner that is scholarly, professional, and consistent with expectations for professionals in health care administration.
 - Create a visually pleasing, professional presentation tailored to a specific audience that uses charts

and/or images that support the content.

- Communicate critical content clearly and persuasively in a limited time.

Note: Complete the assessments in this course in the order in which they are presented.

Preparation

Use [SMART Objective Setting Guide \[DOCX\]](#) to complete the assessment.

To prepare for the assessment, begin by reviewing your four recommended strategies. Then, using the SMART Objective Setting Guide, create a **minimum** of three SMART objectives for each strategy. These objectives will become the basis of your presentation and will ultimately help the organization achieve the strategic direction you have recommended.

In addition, you may wish to review the assessment instructions and scoring guide to ensure that you understand the work you will be asked to complete.

Note: As you revise your writing, check out the resources listed on the Writing Center's [Writing Support](#) page.

Recording Equipment Setup and Testing

Check that your recording equipment and software is working properly, that your audio recording quality is sufficient, and that you know how to record and upload your presentation. You may use Kaltura or other technology of your choice for your audio recording. You may also add audio directly to your slides, using PowerPoint or other presentation software.

If using Kaltura, refer to the

[Using Kaltura](#)

for directions on recording and uploading your video in the courseroom.

Note: If you require the use of assistive technology or alternative communication methods to participate in this activity, please contact DisabilityServices@Capella.edu to request accommodations.

Scenario

In your weekly one-on-one meeting, your manager congratulates you on the comprehensive and well-researched work you have done to date. The CEO has been working with the rest of the organization's leadership team to adopt the overarching strategies for the organization that your manager recommended. However, your manager and CEO are seeking clarification on how to translate these strategies into meaningful benchmarks, or performance measures. They want to know how the organization will measure progress in following these strategies. In previous discussions with your manager, you have been describing the SMART methodology for writing objectives that support the overarching strategies. She has asked you to share the SMART objectives you have written for each strategy with the CEO in a brief presentation.

You are ready to begin creating your presentation and the slides that you will use to support your key points and conclusions. Your manager reminds you that the CEO expects a brief, substantive, and concise presentation. You will be lucky to get 15 minutes of the CEO's time. Consequently, she suggests that you include no more than 10–12

slides, or you will run out of time and cautions you about not creating a "death by PowerPoint" experience for the CEO. You already know from experience that your organization expects professional presentations that adhere to the organization's branding standards.

Requirements

Create an executive-level presentation with voice-over of the SMART objectives that correspond to the organization's main strategies, associated performance indicators and metrics, and strategic plan recommendations.

Practice your presentation until you are satisfied with it, staying as close as possible to the limited time allotted. Remember that the audience is your organization's CEO. All the work you have done so far in this course has prepared you for this briefing, but you are ready.

Presentation Requirements

The requirements, outlined below, correspond to the grading criteria in the Strategic Plan Objectives and Balanced Scorecard Scoring Guide, so be sure to address each point. Read the performance-level descriptions for each criterion to see how your work will be assessed.

- Present your operational recommendations and strategic control mechanisms.
 - Include goals, objectives, resources, and action steps for reconfiguring and aligning the organization's structure, systems, shared values, management style, staff, and skills.
- Define critical success indicators that enable an organization to measure success in implementing the strategy.
- Propose a strategic plan to optimize outcomes and mitigate risks in the organization.
- Analyze potential long-term opportunities and operational components in the strategic planning process.
- Analyze the effect of strategy formulation on human, financial, and technical resources.
 - Weigh factors of measurement against current organizational benchmarks.
- Create a visually pleasing, professional presentation tailored to a specific audience.
 - Use charts and images that support the content.
- Communicate critical content clearly and persuasively in a limited time.

Presentation Format and Length

Your presentation should consist of 10–12 slides and be 10–15 minutes in length. Use the notes portion of each slide to write your script. (The notes section is **required**).

You may use the structure below as a guide for organizing and timing your presentation. **You do not need to place your slides in this specific order.**

- Slide 1: Title slide (15 seconds).
- Slide 2: Revised/updated vision, mission, and values from Assessment 3. (30 seconds).
- Slide 3: Gap analysis: desired versus actual position (1 minute).
- Slide 4: Recommend **Overarching Strategy One** with three objectives (2 minutes).
- Slide 5: Recommend **Overarching Strategy Two** with three objectives (2 minutes).
- Slide 6: Recommend **Overarching Strategy Three** with three objectives (2 minutes).
- Slide 7: Recommend **Overarching Strategy Four** with three objectives (2 minutes).
- Slide 8: Visual: Balanced scorecard table with 1–3 performance indicators and associated metrics (1 minute).

- Slide 9: Analysis (1 minute).
- Slide 10: Recommendation of new strategic plan strategies based on the balanced scorecard (1 minute).
- Slide 11: Overall recommendations/conclusions (1 minute).
- Slide 12: References.

Include all relevant supporting details, such as data, charts, and graphs, as an addendum to the presentation. Indicate the slide associated with the relevant data set. In addition, include all relevant data and narrative in the notes section of each slide.

Supporting Evidence

Cite a minimum of six current scholarly and authoritative sources to support your presentation. Format your citations and references according to APA style and formatting guidelines.

Additional Requirements

Proofread your slides and addendum before you submit them to minimize errors that could distract readers and make it more difficult for them to focus on the substance of your presentation.

Portfolio Prompt: You may choose to save your presentation to your ePortfolio.



SCORING GUIDE

Use the scoring guide to understand how your assessment will be evaluated.

[VIEW SCORING GUIDE](#) 