

Annex:
Assessment Worksheet

Assessment Worksheet

Overview of Assessment Worksheet

Exercise: Determining my organisation's stage of growth

Growth Drivers	Growth Sub-Drivers
Driver 1: Member	<ul style="list-style-type: none">a. Member Experienceb. Services and Marketsc. Marketingd. Members Acquisition and Competition
Driver 2: Finance	<ul style="list-style-type: none">a. Finance Sustainability and Growthb. Finance Processes and Controlsc. Stakeholder Management
Driver 3: Strategy Planning & Operations	<ul style="list-style-type: none">a. Strategy and Planningb. Operational Excellencec. Continuous Improvement
Driver 4: Risk	<ul style="list-style-type: none">a. Governance Structure & Responsibilitiesb. Risk Managementc. Policies, Procedures and Compliance
Driver 5: People	<ul style="list-style-type: none">a. Capabilityb. Performance Management and Rewardsc. Leadershipd. Human Resource Policies
Driver 6: Technology	<ul style="list-style-type: none">a. Digital Organisationb. Data & Analyticsc. Security & Privacy

Guide to the Assessment Worksheet

Driver 1: Member

Sub-Driver: Member Experience

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Member Experience	None of the statements apply (AP 1.1.4)	Member experience is siloed and often different across all touch points (AP 1.2.4)	The quality of member experience is consistent within, but not always across all channels (AP 1.3.4)	Quality of experience is customised and consistent across all channels and touchpoints	B	D	Currently, we communicate updates to members through newsletters and email. Our organisation aims to centralise all member updates through our website for more consistency in member experience.

Select "N/A" if this Sub-Driver does not apply to the context of your organisation

These refer to the respective Action Plans (AP) found in the main toolkit; each statement is tagged to a corresponding action plan

Read descriptions for Basic, Developing and Leading to determine which statement most accurately describes the state of your organisation in terms of its Sub-Driver maturity (in this case, "Member Experience")

Indicate which statement (B/D/L) most accurately describes your organisation's current state

Indicate which statement (B/D/L) most accurately describes your organisation's desired state

Elaborate on why the selected stage (B/D/L) was chosen, and what specific areas are intended to be improved to move from the current state to the desired state

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Driver 1: Member

Sub-Driver: Member Experience

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Member Experience	None of the statements apply (AP 1.1.4)	Member experience is siloed and often different across all touch points (AP 1.2.4)	The quality of member experience is consistent within, but not always across all channels (AP 1.3.4)	Quality of experience is customised and consistent across all channels and touchpoints			
Member Engagement	None of the statements apply (AP 1.1.7)	The organisation periodically engages its members (AP 1.2.7)	The organisation regularly engages members and proactively reaches out to members to gather feedback (AP 1.3.7)	The organisation has an established and robust member engagement strategy, and utilises it to gain consistent insights on member sentiments			
Member Loyalty	None of the statements apply (AP 1.1.8)	Member loyalty is recognised by the organisation; Current products and/or services meet existing member needs (AP 1.2.8)	There are membership recognition programmes and rewards in place for long term members (e.g. long membership awards, discounted services, etc.) (AP 1.3.8)	Member loyalty is reflected through their contribution of ideas and insights that support the development of new services or programmes for the organisation; Members' contribution and participation in organisation activities are tracked and rewarded accordingly			

Exercise: Determining my organisation's stage of growth - Worksheet

Driver 1: Member

Sub-Driver: Member Experience

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Member Segmentation and Analytics	None of the statements apply (AP 1.1.2)	Basic segmentation is used to identify different categories of members to understand their specific needs (AP 1.2.2)	Analytics are leveraged to assess different member segments to identify and tailor the appropriate member service and experience according to needs (AP 1.3.2)	Predictive analytics are deployed to proactively identify potential growth opportunities for the different member segments			
Expansion of Services and Markets	None of the statements apply (AP 1.1.5)	The organisation has local initiatives and programmes in place to facilitate growth opportunities for member companies (AP 1.2.5)	The organisation identifies international business matching opportunities for member companies to facilitate expansion overseas and into emerging or diversified markets (AP 1.3.5)	The organisation has an established global network of partners to provide international business opportunities for its members; The organisation leverages on multiple levels of cross-collaboration with other government agencies, TACs, business entities and other organisations			

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Driver 1: Member

Sub-Driver: Marketing

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Marketing	None of the statements apply (AP 1.1.6)	Marketing is focused on promoting the organisation's products and/or services (AP 1.2.6)	Marketing is focused on branding and member retention (AP 1.3.6)	The organisation is focused on developing deeper, long-term and continuous member relationships; Increasingly innovative and responsive digital marketing is integrated with traditional methods			
Branding	None of the statements apply (AP 1.1.1)	There is an established vision, purpose and mission for the organisation (AP 1.2.1)	There are efforts made to increase brand awareness of the organisation within the sector or industry (AP 1.3.1)	The organisation has successfully developed a strong brand image within the sector or industry; The organisation regularly reviews the brand identity and ensures its relevance. When necessary, rebranding occurs to keep up with the VUCA (volatile, uncertain, complex and ambiguous) environment			

Exercise: Determining my organisation's stage of growth - Worksheet

Driver 1: Member

Sub-Driver: Member Acquisition and Competition

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Member Acquisition Management	None of the statements apply (AP 1.1.9)	Members are acquired through traditional means and there is no focus on new member acquisition (AP 1.2.9)	There is planned approach to acquire members through various channels such as reaching out to potential members through industry engagement and networking events (AP 1.3.9)	Brand image and reputation generates membership sign-ups; The membership function proactively attracts and acquires members through the use of digital marketing tools (e.g. social media, website advertisements, google analytics, etc.)			
Competitor Analysis and Pricing	None of the statements apply (AP 1.1.3)	The competitive environment is analysed to identify and assess the impact of competitors' pricing on the organisation's pricing strategies (AP 1.2.3)	Knowledge of competitors is used to influence pricing strategies and to recommend an optimal pricing level for the products and/or services provided by the organisation (AP 1.3.3)	Competitors' activities and market trends are comprehensively evaluated to proactively evolve products and/or services to value add to members			

Exercise: Determining my organisation's stage of growth - Worksheet

Driver 2: Finance

Sub-Driver: Financial Sustainability and Growth (1/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Revenue Sources	None of the statements apply (AP 2.1.1)	Membership is the core revenue source for the organisation (AP 2.2.1)	Revenue sources are identified and evaluated to achieve financial stability for the organisation (AP 2.3.1)	There is access to multiple sources of revenue (e.g. training, events, etc.) to fund organisation growth			
Working Capital	None of the statements apply (AP 2.1.2)	Leaders are aware of how working capital supports funding (AP 2.2.2)	The organisation knows how to improve working capital but has not fully implemented it yet (AP 2.3.2)	The organisation's working capital is fully optimised as an asset; There is a working capital allocation plan in place			

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Driver 2: Finance

Sub-Driver: Financial Sustainability and Growth (2/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Finance Processes and Controls	None of the statements apply (AP 2.1.3)	Financial controls are detective rather than preventative. They are primarily maintained by the staff (AP 2.2.3)	The organisation has robust financial controls, which are predominantly preventative (AP 2.3.3)	Financial policies, processes and controls are consistent across the organisation and are highly automated and strategic			

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Driver 2: Finance

Sub-Driver: Stakeholder Management

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Stakeholder Management	None of the statements apply (AP 2.1.4)	The organisation builds trust with stakeholders by focusing on compliance and statutory requirements (AP 2.2.4)	The organisation understands stakeholder needs and is increasingly transparent in its communications. There are clearly defined roles and responsibilities to manage key stakeholders (AP 2.3.4)	The organisation clearly articulates its value proposition and tailors it to individual stakeholders. There is a track record of consistent delivery against promises — no surprises. The organisation is ready to explain its financial position to its stakeholders; There are evolving functions to manage banks, sponsors, and other stakeholders			

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Driver 3: Strategy Planning & Operations

Sub-Driver: Strategy and Planning

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Value Creation Strategy	None of the statements apply (AP 3.1.2)	The organisation is able to understand and meet the needs of its members (AP 3.2.2)	The organisation is constantly exploring new ways and opportunities to create or add value to its members (AP 3.3.2)	The organisation strategy embraces an innovative culture fully aligned with the different member needs and requirements to deliver optimal growth and financial sustainability			
Organisation Continuity Planning	None of the statements apply (AP 3.1.3)	The organisation has continuity plans and measures in place to ensure organisation continuity in the event of disruption or crisis (AP 3.2.3)	The staff are clearly communicated or educated on the organisation continuity plans to ensure organisational awareness (AP 3.3.3)	Continuity plans are proactively reviewed for effectiveness and continuously updated for relevance in managing future disruptions or crisis situations			
Organisation Strategy and Partnerships	None of the statements apply (AP 3.1.1)	The go-to-market strategy is opportunistic; Strategic partnerships are not a key priority (AP 3.2.1)	The go-to-market strategy drives short term growth; Strategic partnerships are occasionally leveraged to tap on each others' competencies or to deliver scale (AP 3.3.1)	The organisation strategy includes a plan to drive long term sustainable growth and uses strategic partnerships as a key component in driving the strategy			

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Driver 3: Strategy Planning & Operations

Sub-Driver: Operational Excellence

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Operational Excellence	None of the statements apply (AP 3.1.4)	There is a focus on operational excellence within silos in the organisation; Standard operating procedures (SOPs) are developed, but not often communicated or reviewed (AP 3.2.4)	Cross-functional collaboration drives productivity and cost-optimisation across the organisation; SOPs are constantly reviewed and clearly communicated to the staff (AP 3.3.4)	Operations are fully integrated within the organisation; Structure is an optimal combination of outsourcing, in-house capability and collaboration with external parties for cost-effectiveness, productivity and efficiency measures			

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Driver 3: Strategy Planning & Operations

Sub-Driver: Continuous Improvement

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Continuous Improvement	None of the statements apply (AP 3.1.5)	There is an application of continuous improvement to organisation activities and processes, however done on an ad-hoc basis (AP 3.2.5)	Clear roles and responsibilities are appointed for continuous improvement initiatives, driving a common approach towards identifying improvements to processes (AP 3.3.5)	The organisation has an established proactive and innovative culture in consistently identifying continuous improvement measures to enhance processes for optimisation			

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Driver 4: Risk

Sub-Driver: Governance Structure and Responsibilities

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Structure and Responsibilities	None of the statements apply (AP 4.1.1)	An Executive Committee (Exco)/ Council/ Board of Directors exists. The roles and responsibilities of the Exco and Secretariat are clearly defined and understood by all (AP 4.2.1)	The Exco acts by collective leadership and is actively involved in strategic oversight without stepping over their responsibilities and boundaries; The Exco sets the overall strategic direction of the organisation while the Secretariat drives the governance function in ensuring compliance with the Constitution, the Societies Act and Societies Regulation and relevant laws (AP 4.3.1)	There is a strong governance structure in place; The Exco exercises independence and sets the risk culture and appetite in a tone from the top			

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Driver 4: Risk

Sub-Driver: Risk Management

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Risk Identification Management	None of the statements apply (AP 4.1.2)	Responsible risk taking is seen as core to organisation success; Key risks are discussed on a regular basis by the leaders (AP 4.2.2)	There is a structured approach to identifying, monitoring and assessing key risk and controls (e.g. operational, finance and compliance). Risk management is clearly articulated in all role descriptions and performance criteria (AP 4.3.2)	Key organisation risks are aligned to key performance indicators and managed to ensure organisation objectives are met; Risk is embedded in the operational culture of the organisation; The organisation proactively communicates its risk management programme to the relevant stakeholders			

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Driver 4: Risk

Sub-Driver: Policies, Procedures and Compliance

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Policy	None of the statements apply (AP 4.1.3)	The Secretariat develops and controls risk policies and procedures for major risks under the direction of the Exco (AP 4.2.3)	Individual functions have formally documented policies and procedures. These are aligned to overall organisation strategies and objectives (AP 4.3.3)	There is a comprehensive, documented, organisation-wide policy framework to manage organisation risks (e.g. operational, finance and compliance), with a strong leadership tone from the top. The risk framework extends to external stakeholders in the value chain			
Compliance	None of the statements apply (AP 4.1.4)	The organisation has a reactive approach to complying with the Constitution and external regulations (AP 4.2.4)	There is an independent compliance approach to manage compliance with the Constitution and external regulations (AP 4.3.4)	The organisation contributes to the long-term development of the industry regulatory landscape			

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Driver 5: People

Capability (1/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Strategy	None of the statements apply (AP 5.1.5)	Human resources are focused on meeting current deadlines and organisation objectives (AP 5.2.5, AP 6.2.6)	Human resources are focused on meeting future deadlines and organisation objectives (AP 5.3.3)	The People Plan plays a fundamental role in strategy and organisation performance by focusing on an agile workforce, diversity and technology enablement; Diversity, agility and teamwork are embedded in the culture of the organisation and essential to achieving organisation goals			
Planning	None of the statements apply (AP 5.1.3)	Individuals are clear about their roles and responsibilities (AP 5.2.3)	In-house skill gaps are identified and minimised through a combination of outsourcing and flexible working (AP 5.3.7)	Human resources planning is highly proactive and embraces technology, partnerships and collaborations to optimise productivity			

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Driver 5: People

Sub-Driver: Capability (2/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Culture	None of the statements apply (AP 5.1.4)	The purpose and roles of trade associations and chambers are clearly articulated and understood by all (AP 5.2.4)	Behaviours that represent the desired organisation culture is demonstrated (AP 5.3.4)	The culture and values of the organisation drive the attraction and retention of staff			
Embedding Innovation	None of the statements apply (AP 5.1.6)	The organisation encourages innovative mindsets and adoption of technology to enhance organisation capabilities (AP 5.2.6)	The organisation develops innovation as a competency and attracts like-minded talent (AP 5.3.5)	There is a strong focus on innovation across the organisation. Staff are given time to explore novel concepts and ideas; Leaders are champions of innovation and advocate the adoption of technology			

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Driver 5: People

Sub-Driver: Performance Management and Rewards (1/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Performance Management Framework	None of the statements apply (AP 5.1.8)	Performance is managed on an individual basis (AP 5.2.7)	There is a framework for aligning performance management with organisation strategy (AP 5.3.8)	Cascading organisation objectives and goals are linked to rewards; The organisation uses analytics to measure activity and outcomes of both the team and the individual			
Feedback	None of the statements apply (AP 5.1.7)	Managers provide ad-hoc feedback to staff (AP 5.2.7)	Feedback is provided throughout the year through a structured review framework (AP 5.3.6)	Continuous feedback is provided throughout the year on performance, rewards and succession planning			

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Driver 5: People

Sub-Driver: Performance Management and Rewards (2/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Values	None of the statements apply (AP 5.1.7)	Organisational values exist but lack a clear link to performance management (AP 5.2.7)	Organisational values are embedded in performance management (AP 5.3.8)	Organisational values are understood by all. Behaviours are aligned to performance and linked to rewards			
Rewards	None of the statements apply (AP 5.1.7)	Rewards are provided to attract and retain individuals and to meet organisation objectives (AP 5.2.7)	There is visible evidence of links between high performance, rewards and the achievement of organisation objectives (AP 5.3.8)	Behaviours as well as outcomes are rewarded for both the team and the individual; A strong employer brand is used to attract, motivate and retain high performers and teams			

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Driver 5: People

Sub-Driver: Human Resource Policies

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Human Resource Policies	None of the statements apply (AP 5.1.2)	Human resource (HR) policies are in place and documented within the organisation (AP 5.2.2)	The HR policies are constantly reviewed and refined in accordance with the legislative and compliance requirements and risks relevant to the organisation (AP 5.3.2)	The HR policies are aligned with national strategic HR initiatives and legislation and integrated with global industry trends and best practices			

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Driver 5: People

Sub-Driver: Leadership

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Leadership	None of the statements apply (AP 5.1.1)	The leaders are aligned with the Executive Committee (Exco)/ Council/ Board of Directors on the organisation strategy and recognise the role they play in contributing to the organisation's goals and objectives (AP 5.2.1)	The leaders are passionate about the organisation strategy and motivate people to achieve the organisation's goals and objectives (AP 5.3.1)	The leaders are passionate and inspiring, lead by execution and perceive themselves as people-leaders and not operational managers			

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Driver 6: Technology

Sub-Driver: Digital Organisation (1/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Adoption of Technology	None of the statements apply (AP 6.1.1, AP 6.1.2)	The organisation is risk-averse and slow to adopt new technology; Digital initiatives are limited in scope (AP 6.2.1, AP 6.2.2)	The organisation waits to adopt new and emerging technologies until they are proven; Legacy persists and acts as a drain on resources, investment and focus (AP 6.3.1, AP 6.3.2, AP 6.3.3, AP6.3.4)	Emerging technologies are embraced and adopted rapidly; Experimentation is encouraged and failure is acceptable; Technology investment is proactive and agile to meet the strategic objectives of being a digital organisation			
Digital Experience	None of the statements apply (AP 6.1.1, AP 6.1.2)	There is very limited thinking on how the digital experience should be structured (AP 6.1.1, AP 6.1.2)	Key digital technologies are leveraged to support the existing operating model (AP 6.3.1, AP 6.3.2, AP 6.3.3, AP 6.3.4)	The organisation has become a digital organisation. Digital is at the heart of the way the organisation operates, the products and/or services it offers, and how it interacts with the members and other stakeholders			

Exercise: Determining my organisation's stage of growth - Worksheet

Driver 6: Technology

Sub-Driver: Digital Organisation (2/2)

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Platforms	None of the statements apply (AP 6.1.1, AP 6.1.2)	Digital platforms have been established but are not integrated with other platforms and rely on legacy platform infrastructure; The technology function drives change using only internal staff or long-term established partners (AP 6.2.1, AP 6.2.2)	Digital platforms are driven from the organisation's perspective. The technology function drives change using internal staff or long-term established partners, with limited experimentation with newer technology vendors or service providers (AP 6.3.1, AP 6.3.2, AP 6.3.3, AP 6.3.4)	Digital platforms are fully established and driven from an externally focused (member and ecosystem) multi-channel perspective. The technology function within the organisation seeks the best of skills within and outside of the organisation; Emerging technologies such as RPA are adopted throughout the organisation to increase efficiency and drive down cost			

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Driver 6: Technology

Sub-Driver: Data and Analytics

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Data Quality and Management	None of the statements apply (AP 6.1.3)	Data management is ad hoc throughout the organisation, and there is limited capability to handle big data; The organisation has challenges generating value and insight from its own (AP 6.2.3, AP 6.2.4)	The organisation recognises the importance of quality data and has deployed tools and techniques to drive data accuracy and insight (AP 6.3.5, AP 6.3.6)	The organisation has data, governance and processes in place, with the appropriate systems to support data and quality management			
Data Collection and Analysis	None of the statements apply (AP 6.1.3)	Data is collected through traditional approach and limited analysis is performed (AP 6.2.3, AP 6.2.4)	Market intelligence and data analysis is used in various parts of the organisation to identify growth opportunities and improve decision-making and processes (AP 6.3.5, AP 6.3.6)	The organisation uses data to forecast future needs and influence decision-making across the organisation			

Exercise: Determining my organisation's stage of growth - Worksheet

Driver 6: Technology

Sub-Driver: Security and Privacy

Component	NA	Basic	Developing	Leading	Current Stage	Desired Stage	Remarks
Responsibility	None of the statements apply (AP 6.1.4)	Security and privacy issues are driven 'bottom-up' in the organisation (AP 6.2.5)	Security is viewed as an IT issue, but has oversight from and regular reporting to, non-IT stakeholders (AP 6.3.7)	Security is viewed as a critical component of the organisation's overall risk management via strong 'tone at the top'			
Scope	None of the statements apply (AP 6.1.5)	Compliance with regulatory requirements drives security efforts; Focus on the importance of digital assets to organisation strategy is limited; Security issues are identified and addressed reactively (AP 6.2.5)	Security architecture is in place that supports a defence strategy. This provides layers of deterrence that limits attackers' ability to access critical digital assets; The security function recognises and regularly evaluates the ecosystem including reliance on third parties and partners (AP 6.3.7)	Security efforts follow an 'active defence' approach with proactive identification of issues driven from inside the organisation; Security and privacy strategies are driven by protection of the most critical digital assets and support of organisation growth drivers			
Focus	None of the statements apply (AP 6.1.6)	The security focus is on building and/or maintaining perimeter controls and legacy end-point controls (e.g. anti-virus) (AP 6.2.5)	The company recognises and balances investment and operational effort between preventative controls and a strong monitoring and response capability (AP 6.3.7)	The focus is on operating a resilient security and privacy capability			