

Agovia

Current State Template Examples

The below template examples can be used to gather information for your organization. They are provided as a starting point for creation of your own templates and are unlikely to fill your need if used as is. Let them tweak your creativity but if you invest the time to produce your own tool you will get a better result.

Business Current State		
	General Area	Specific Characteristic
1	Revenue	Primary source of revenue, income, or funding
2	Revenue	Revenue this year (estimated)
3	Revenue	Revenue last year
4	Revenue	Change in Revenue
5	Net Income	Net income this year (estimated)
6	Net Income	Net income last year
7	Net Income	Change in Net Income
8	Key specific ratios:	Expense ratio
9	Key specific ratios:	Cost of goods sold
10	Key specific ratios:	Other
13	Volume of business transactions this year (estimated):	Sales
14	Volume of business transactions this year (estimated):	Units Sold
15	Volume of business transactions this year (estimated):	Other
16	Volume of business transactions last year	Sales
17	Volume of business transactions last year	Units Sold
18	Volume of business transactions last year	Other

Service Current State		
	General Area	Specific Characteristic
1	Key service metrics What are the key things you measure to determine if you are providing acceptable service?	Service Metric #1
2	Key service metrics What are the key things you measure to determine if you are providing acceptable service?	Service Metric #2
3	Key service metrics What are the key things you measure to determine if you are providing acceptable service?	Service Metric #3
4	Key service metrics What are the key things you measure to determine if you are providing acceptable service?	Service Metric #4
5	Key service metrics What are the key things you measure to determine if you are providing acceptable service?	Service Metric #5
6	Key service metrics What are the key things you measure to determine if you are providing acceptable service?	Service Metric #6
7	Service objectives and results: Based on the above, what are your objectives and actual results. If trending information is available, attach charts showing results over time.	Objectives Results Comparison
8	Gap metrics What gaps in the objectives vs. results are of concern and must be addressed in the coming year?	Key gap metrics
9	Root Causes	
10	Customer satisfaction	Customer Service Satisfaction Results
11	Tools used to measure service success What are the mechanisms used to understand the success or failure of service provisioning. Are they consistent with the customer perception and do they represent that perception?	Connection to customer perception and satisfaction
12	Complaint numbers and trends What types and how many complaints have we received in the past 24 months? Is there a pattern? Is it increasing or decreasing? Have we applied problem or incident management techniques to the complaints and crafted resolutions?	Specific Complaint Metrics
13	Service victories – last 24 months	
14	Service failures – last 24 months	
15	Servicing investment return and efficiency and effectiveness of management	Svc. requests handled/day
16	What are the efficiency indicators of the servicing areas? What is the range of service effectiveness of service representatives? Possibilities:	Efficiency Indicator #1
17	What are the efficiency indicators of the servicing areas? What is the range of service effectiveness of service representatives? Possibilities:	Efficiency Indicator #2
18	What are the efficiency indicators of the servicing areas? What is the range of service effectiveness of service representatives? Possibilities:	Efficiency Indicator #3

Regulatory Current State		
	General Area	Specific Characteristic
1	Regulatory obligations currently requiring action	
2	Projected changes in regulatory or legal requirements	
3	Anticipated governmental, regulator, or governing body audits, examinations, or reviews.	
4	Regulatory preparatory action required	
5	Anticipated regulatory changes requiring action	
6	Proposed regulatory action requiring input, lobbying, and comment.	
7	Complaints filed with regulatory, or industry monitoring groups:	Numbers
8	Complaints filed with regulatory, or industry monitoring groups:	Trends
9	Complaints filed with regulatory, or industry monitoring groups:	Outcomes
10	Complaints filed with regulatory, or industry monitoring groups:	Indicators of required change?

Operations Current State		
	General Area	Specific Characteristic
1	Operational results: What are our goals and how do our actual results compare to our goals	
2	Size and complexity:	What is the total size of our operational organization and by unit?
3	Growth:	How much (in terms of both head-count and complexity) has the organization grown in the past 24 months?
4	Supervisory ratios:	What is supervisor to employee ratio both overall and by unit?
6	Process:	Discuss the current state of documentation, repeatable processes, and training.
7	Operational Expense	What is our operational expense?
8	Operational Expense	How does that compare to benchmarked organizations?
9	Expense Breakdown:	What is the breakdown of operational expense by primary units?
10	What are our operational triumphs in the past 24 months?	
11	What are our operational failures in the past 24 months?	
12	Known issues:	List all known issues and challenges in the operational units
13	Primary root causes: Discuss the primary root causes of operational challenges. Possibilities: Management skill, Span of Control, IT problems, Complex product base, other	
14	Other: Discuss any other issues pertinent to the performance and needs of the Operations area.	

Market Current State		
	General Area	Specific Characteristic
1	Describe your marketing philosophy and effort currently expended	
2	Market segment, differentiation, niche, etc.	Describe the market segment you serve and how you differentiate your business to be successful in that market. Who are your primary customers and are they the same as the primary source of your income?
5	Outcome of Marketing objectives associated with branding;	Specific desired outcome
6	Describe the objectives of your marketing efforts designed to drive sales	Specific desired outcome
7	Describe the objectives of your marketing efforts - Other	Specific desired outcome
10	Marketing results metrics: How marketing success is measured and is it currently meeting results expectations? If not, what is the gap?	Results and Gap
12	Current known plans	What plans are currently known for future marketing efforts?
14	Long Term Goals	
15	Is there an ongoing marketing plan coordinated with long term business plans? If so, what is that plan and what support will be required from other parts of the organization?	Describe:
16	What are the major victories of the Marketing efforts in the past 24 months? Especially as related to measurable business success.	
17	What are the major failures of the Marketing efforts in the past 24 months? Especially as related to measurable business success	

Product Current State		
	General Area	Specific Characteristic
1	Product Mix:	How does current product mix meet the needs of customers
2	Which products are successful and why or why not	
3	Risks and Challenges:	
4	Risks with the current products such as:	Regulatory changes
5	Risks with the current products such as:	Obsolescence
6	Risks with the current products such as:	Manufacturer discontinuance
9	Product Portfolio:	
10	Are there any holes in your current product portfolio?	
11	Do your products meet the standards of:	Acquisition
12	Do your products meet the standards of:	Retention
13	Do your products meet the standards of:	Repeat Business
15	What plans are currently known for future product changes?	
16	Business Plan Support	
17	Product mix support the future needs of your business?	Increased penetration
18	Product mix support the future needs of your business?	Customer affinity
19	Product mix support the future needs of your business?	Long term relationships
20	Product mix support the future needs of your business?	Other

Information Technology Current State		
	General Area	Specific Characteristic
1	Is your technology support provided by an in-house team or through a 3 rd party provider or a combination of both?	
2	What are the services you currently use and rate the adequacy of the service	Internet support
3	What are the services you currently use and rate the adequacy of the service	Desktop support
4	What are the services you currently use and rate the adequacy of the service	Network and server support
5	What are the services you currently use and rate the adequacy of the service	Voice over IP Telecom
6	What are the services you currently use and rate the adequacy of the service	Mainframe
7	What are the services you currently use and rate the adequacy of the service	Other
9	Cost or expense ratio associated with information technology	Value received for dollar spent and comparison to industry benchmarks
10	Satisfaction with current technology model	Rate your satisfaction. (If switching costs were zero, would you keep the current provisioning model?)
11	Technology support areas currently in need of improvement or upgrade	Administration systems
12	Technology support areas currently in need of improvement or upgrade	Internet presence or capabilities
13	Technology support areas currently in need of improvement or upgrade	Desktop productivity tools
14	Technology support areas currently in need of improvement or upgrade	Hardware refresh
15	Technology support areas currently in need of improvement or upgrade	Other
17	Business functions or business success dependent on changes in IT provisioning	
20	Business advantage currently provided by the Information Technology	
21	Major IT failures in the past 24 months	
22	Major IT successes in the past 24 months	
23	What portion of your business is critically tied to working IT support?	
24	Current State: business continuity, disaster recovery, and backup/recovery state.	

Organizational Management Current State		
	General Area	Specific Characteristic
1	Known Management Challenges Are there changes required or action that must be taken at the organizational management level that is currently known?	Changes in management personnel
2	Known Management Challenges Are there changes required or action that must be taken at the organizational management level that is currently known?	Management or control failures
3	Known Management Challenges Are there changes required or action that must be taken at the organizational management level that is currently known?	Other
7	Operational changes	
8	Changes to the operations model in the recent past that require changes to the management structure or model.	Increased use of 3 rd party vendors for support or business processing
9	Changes to the operations model in the recent past that require changes to the management structure or model.	New and different products
10	Changes to the operations model in the recent past that require changes to the management structure or model.	IT systems changes
11	Changes to the operations model in the recent past that require changes to the management structure or model.	Other
13	Management event horizon: management changes planned or anticipated:	Retirements
14	Management event horizon: management changes planned or anticipated:	Decentralization of workforce
15	Management event horizon: management changes planned or anticipated:	Acquisition of business
16	Management event horizon: management changes planned or anticipated:	Other
18	Succession planning and management continuity plans	What is the state of management succession and continuity planning?

Projects Current State		
	General Area	Specific Characteristic
1	Project #1	
2	Project #2	
3	Project #3	
4	Project #4	
5	Project #5	
6	Project #6	

Mandated Objectives Current State		
	General Area	Specific Characteristic
1	Dividend requirement	
2	Stock Value	
3	Operations to Income Ratio	
4	Other	
5	Other	

Guidelines Current State		
	General Area List Guidelines, Standards, Constraints	Specific Characteristic Describe Specific Nature of the Item
1	Technical Standards:	ITIL Framework
2	Technical Standards:	Microsoft products
3	Technical Standards:	Other
5	Expense Goals	
6	Product quality standards	
7	Limitations and Constraints	Geographic limitations
8	Limitations and Constraints	Acceptability of using various types of expense control mechanisms (i.e. reductions in force)
9	Limitations and Constraints	Requirement to utilize partners or subsidiaries
10	Limitations and Constraints	Investment limitations.
11	Limitations and Constraints	Other