



# The Investors in Excellence Standard

Focusing on What Matters Most to your organisation

# Overview

The Investors in Excellence Standard is a unique framework, which combines the very best approaches to excellence, providing any organisation with a proven roadmap to achieve high performance.

The Investors in Excellence Standard was originally developed in 2002 and through extensive research and refinement of the very best elements of approaches to excellence used across the world, the Investors in Excellence Standard guides improved achievements through effective and efficient leading, resourcing and delivering activities.

The Standard supports the development and ongoing improvement of organisations of any size and from any sector. To achieve recognition as an Investor in Excellence, an organisation must provide satisfactory evidence to address all activities and outcomes contained within the Standard.

Recognition that the Standard has been achieved does not mark the end of the excellence journey. As continuous improvement and the achievement of ongoing success are core elements of being an Investor in Excellence, maintaining recognition as an Investor in Excellence requires ongoing demonstration of these requirements.

In 2018, the Standard was updated to a Capability Maturity Model Integration approach based on 8 bands of organisational performance from Disorganised to Outperforming. In the Autumn of 2018 the Standard migrated to version 6.0, including e-Assessment, app-based tools and techniques, Excellence Dashboards and 5 bespoke Excellence Awards for People, Leadership, Culture and Engagement, Change Management, and Process Management.

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Investing in excellence - it is the golden thread that runs through an organisation.

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# What does it cover?

The Investors in Excellence Standard covers all activities and achievements within an organisation and is focused on delivering What Matters Most for the organisation, its customers, people and other stakeholders.

Identifying What Matters Most is a precursor to success.

Having established What Matters Most and aligning its activities to deliver it, an Investor in Excellence focuses on defining and achieving a balanced set of positive measured outcomes through effective and efficient leading, resourcing and delivering activities, which are reflected in the following Essential Elements of the Investors in Excellence Standard:



## What Matters Most?



Leading



Resourcing



Delivering



Achieving

Each Element contains related Indicators and supporting questions all of which must be addressed in preparation for recognition against the requirements of the Investors in Excellence Standard.

It is essential that the evidence provided in addressing the Elements and Indicators is aligned to What Matters Most to your organisation.

# The Standard at a glance

## Leading

- 1.1 The core purpose and future destination of the organisation is defined.
- 1.2 Sound strategies and plans are developed to secure the future of the organisation.
- 1.3 Strategies and plans are translated into policies and objectives.
- 1.4 Performance against key objectives is monitored and strategies and plans are reviewed and updated.
- 1.5 A culture of excellence is desired, developed and driven.

## Resourcing

- 2.1 People resources are well managed.
- 2.2 Skills, knowledge and competencies are identified, developed and optimised.
- 2.3 Positive contributions are encouraged, recognised and rewarded.
- 2.4 Collaborative work is effective and value adding.
- 2.5 Assets and liabilities are managed effectively to add value.

## Delivering

- 3.1 The organisation knows its customers and understands their needs and expectations.
- 3.2 Products and services address customers' needs and expectations.
- 3.3 All activities are delivered efficiently through structured processes.
- 3.4 Change and continuous improvement is managed.
- 3.5 Communication is effective and efficient.

## Achieving

- 4.1 The organisation achieves the positive outcomes set out in its strategies and plans.
- 4.2 The organisation meets the needs and requirements of its customers.
- 4.3 The organisation meets the needs and requirements of its people.
- 4.4 The organisation uses analysed performance information to understand the links between what it does and what it achieves.
- 4.5 Performance information is shared and used to drive change and continuous improvement.

### People resources are well managed.

- 2.1a How do you ensure your organisation has the right number of people with the right skills and has them in the right places at the right times?
- 2.1b How do you ensure your people are managed effectively from recruitment through to exit?
- 2.1c How do you ensure that objectives for teams and individuals align with the strategies, plans and policies of your organisation?
- 2.1d How do you provide opportunities for people to stay with and progress within your organisation?
- 2.1e How do you ensure fairness and well-being throughout your organisation?

*Make a note*

### Think About

- ✓ How you ensure that you have appropriate resources to meet the needs of your organisation
- ✓ How your personal and team goals are aligned to your organisation's goals
- ✓ Providing examples of the opportunities for growth and development available to your people



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