



Appendix A: Questionnaire for Uncovering Business Objectives

Questions adapted from Balanced Scorecard Step-by-Step for Government and Nonprofit Agencies. Paul R. Niven

Background

- Why do you exist as an organization (what is the mission)?
- What core values are essential in pursuit of that vision?
- Where do you see your org in 5, 10 and 15 years?
- What must your organization do in order to reach that desired future?
- What measures do you currently use to gauge your success?

Customer

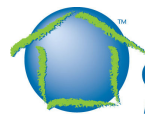
- What must you do well to satisfy your clients?
- Do your clients ask for innovative products?
- Do your clients want the lowest interest rates and fees? Or are they more concerned with flexibility of payment schedule or other features?

Internal Processes

- Do you feel you have a full understanding of your customers?
- Do you feel you have the ability to innovate and try new things quickly in order to meet the needs of your customers?
- What if a product (or a payment process or disbursement policy) fails? Can you retire it quickly?
- Do you have process bottlenecks that prevent you from effectively servicing your clients or managing your donor or regulatory stakeholders?
- What challenges have you had securing philanthropic funds? What challenges have you had securing equity or debt investments?
- What internal processes do you feel are most important to do well in order to meet the needs of your customers?

Building for the future

- What skills or competencies do your staff need in order to succeed and execute your strategy?
- Do you feel your staff adequately trained to execute your strategic goals? If not what kind of training might they need?
- Do you feel you have the right staff to achieve your goals?



- Are your staff happy and satisfied with their work, pay and development opportunities?
- IT should serve your organization so that you can serve your clients better. What is missing?
- Do your staff have the technology they require to meet customer requirements and execute your strategy?

Financial

- Financially, what is the most crucial to your organization? Growing revenue, enhancing productivity, or utilizing your assets more efficiently?
- What opportunities exist to increase revenue? (New market penetration, or more products per client, etc)
- What opportunities exist to use our existing resources more efficiently? Are loan officers carrying the highest caseload they can? Is there a way to bring in more clients with existing staff?
- Are there opportunities to make the back office more efficient to lower costs and increase profit?

Technology

- IT should serve your organization so that you can serve your clients better. What is missing?
- What is your vision for IT in your institution? How will IT support your business goals?
- What in your opinion do you think are the greatest/potential challenge to achieving your vision for IT in your institution?