



# Integrated Business Services

## Self-Assessment

Team Name:

**Description:** A self-assessment to help local and regions drill down deep into how integrated and effective their business services are currently, and where enhancements can be made.

## Introduction

Most communities understand the importance of providing a more coordinated set of talent development solutions for their business. Yet so many still struggle with effectively integrating business services across workforce, education, and economic development. As a result, we're still approaching businesses and their talent needs in silos and only reaching a small share of them. This tool challenges regions and local areas to ask themselves: *Can we be more responsive to businesses as a collective unit and how can we change what we do to make it happen?*

The self-assessment is made up of a number of *indicators* that together begin to demonstrate what a "high-performing" integrated business services system may look like. This tool is designed as a framework to focus the conversation that local areas should be having as they address this challenge.

### **Directions:**

1. Work as a team to complete the self-assessment. For each of the factors in the sections that follow, select a rating from 1 - 5 that reflects your/your team's perspective on where your region stands. Each team member may choose to complete the assessment individually and then convene to compare answers. Or, you may decide to complete it together as a team.
2. Leave plenty of time to engage in an honest discussion about each *indicator* (bulleted statements on the left), and to provide thoughtful strategies for addressing challenges (the box on the right to write your notes).

**NOTE:** *If you are representing the State you should consider taking this assessment from the perspective of providing the support/guidance needed for your local and regional areas to succeed in the following indicators.*

♦ **VISION** ♦

1. A state/regional vision exists for coordinated and aligned business engagement/services.
2. The vision is inclusive of all partners that play a role in the regional talent pipeline from economic development, education, and workforce development. This includes core and key system partners from vocational rehabilitation and adult education to veteran's services and TANF.
3. The notion of shared business client ownership and accountability is institutionalized across agencies/programs. Key to this: partners buy into the notion that working collectively expands the breadth of services offered to business which is a positive for all.

**Notes & Overall Rating** (see key below)

①	②	③	④	⑤	♦ Where/How could this be strengthened?
↑ RATE:					↓ EXPLAIN HERE:
<div style="display: flex; justify-content: space-between; padding: 5px;"> <div style="width: 45%; border-right: 1px solid #ccc; padding-right: 10px;">  </div> <div style="width: 5%;"></div> <div style="width: 45%; padding-left: 10px;"> </div> </div>					

**Overall Ratings:** Fill in the bubbles that best describe your level of partnership, 1 – 5.

① = “Not at all” | ⑤ = “We’ve got this!”

## ♦ DEMAND PLANNING ♦

1. We have access to quality regionalized labor market information (LMI).
2. All of our key business reps have a clear understanding of the region’s overall business and economic climate, including key industries, business lifecycles, workforce trends and needs.
3. Partners use *shared* LMI data as they approach and work with business—there is consensus among partners on key target industries, critical occupations, etc.
4. Business intelligence—or tracking business engagement activity—is managed across key partners through a Customer Relationship Management (or related) system. Partners have access to this information and know how to use it (including understanding confidentiality responsibilities).
5. Business outreach representatives (across partners) share intelligence and coordinate and strategize follow-up. May include an organized business services team comprised of knowledgeable partners with ability to connect businesses to a full range of partner services.

### Notes & Overall Rating *(see key below)*

①	②	③	④	⑤	♦ Where/How could this be strengthened?
↑ RATE:					↓ EXPLAIN HERE:
					

**Overall Ratings:** Fill in the bubbles that best describe your level of partnership, 1 – 5.

① = “Not at all” | ⑤ = “We’ve got this!”

## ♦ ENGAGING WITH BUSINESSES & DELIVERING SOLUTIONS ♦

1. Roles and responsibilities, as it relates to business engagement and follow up, are understood and embraced by all partners. Coordination planning across partners occurs regularly.
2. Our business outreach reps have the skills in building meaningful partnerships with businesses, both individually and in the context of multi-business industry partnerships. Includes ability to work with businesses to effectively validate and dig deep on talent needs
3. Outreach representatives are adept at collecting key business needs/information when meeting with business, maximizing their contact and providing partners with referrals for the sake of all-encompassing solutions. Because we do this, it minimizes touchpoints with business limiting their “visit fatigue”
4. We have an understanding, from working with key businesses, the natural progression/mobility of workers in all targeted industries/occupations (i.e. career ladders/lattices)
5. We have trust with businesses and key target industries—and an understanding of how to leverage resources—to build innovative business-focused programs/services including: work-based learning, apprenticeships, and other recruitment, hiring, training, and transition services.
6. Our coordinated business services represent “the whole” when in front of business. Follow up regularly includes bringing in the partner/resources to address the solution.

### Notes & Overall Rating *(see key below)*

① ② ③ ④ ⑤ ♦ *Where/How could this be strengthened?*

↑ RATE:

↓ EXPLAIN HERE:



**Overall Ratings:** Fill in the bubbles that best describe your level of partnership, 1 – 5.

① = “Not at all” | ⑤ = “We’ve got this!”

## ♦ OUTREACH & COMMUNICATION ♦

1. There is an adopted shared message for communicating to the business community the vision and strengths of the state's/region's integrated business services system.
2. Services being presented to businesses—from across partners—are not siloed or menu-driven, but focus on delivering solutions to expressed business needs.
3. Messaging centers around concepts important to businesses including how these services will impact profitability and productivity.
4. There is a consolidated brand and it is embraced by all partners serving businesses.

### Notes & Overall Rating *(see key below)*

①	②	③	④	⑤	♦	<i>Where/How could this be strengthened?</i>
↑ RATE:			↓ EXPLAIN HERE:			
						

**Overall Ratings:** Fill in the bubbles that best describe your level of partnership, 1 – 5.

① = “Not at all” | ⑤ = “We’ve got this!”

## ♦ SUSTAINABILITY & CONTINUOUS IMPROVEMENT ♦

1. Coordinated cross-partnership measures (i.e. quantifiable goals that likely go beyond WIOA measures) have been developed around engaging and serving businesses.
2. A regional structure is in place (e.g. cross-partner committees, dedicated teams) to guide, implement and sustain this work.
3. An effective staffing structure exists to support both industry sector partnerships (i.e. regional industry-wide business engagement) and the day-to-day business outreach operations. For some this may mean the use of 'industry navigators' to support industry-wide work.
4. Cross-agency training is in place to ensure all partners are aware of the solutions inherent in this type of approach.
5. Leadership buy-in exists across partnerships for demand-driven, coordinated services and shared performance goals & outcomes.

### Notes & Overall Rating *(see key below)*

①	②	③	④	⑤	♦ <i>Where/How could this be strengthened?</i>
↑ RATE:			↓ EXPLAIN HERE:		
					

**Overall Ratings:** Fill in the bubbles that best describe your level of partnership, 1 – 5.

① = “Not at all” | ⑤ = “We’ve got this!”