

P.E.S.T Analysis Template

Situation being analysed? _____

POLITICAL	ECONOMIC
Criteria include: <ul style="list-style-type: none">• Current or planned legislation• Government policy• Funding body policies• Changes in government i.e. local, state• Grants, funding initiatives• Pressure groups	Criteria include: <ul style="list-style-type: none">• Local economy (current, trends, predictions)• Local employment / unemployment• Exchange rates e.g. Impact on purchasing power
SOCIAL	TECHNOLOGICAL
Criteria include: <ul style="list-style-type: none">• Community demographics (current, trends etc)• Local lifestyle trends• Local issues• Customer opinions / attitudes (could be based on survey data)• Customer usage patterns• Changes to law	Criteria include: <ul style="list-style-type: none">• Technology based service competition• Technological developments / solutions (impact of, opportunities arising etc)• Life cycle of current technology (where you are placed in the cycle e.g. need for upgrade)• Customer usage (needs and demands of users)• Access• Legislation, government or local policy impacting on technology and its use• Resourcing (ability to fund technology needs etc)• Intellectual property / copyright issues

Tactics

In an ideal world everyone would understand what you needed to achieve, and you would receive timely support and all the resources you need to achieve your goals. After all, you went through a clear and inclusive strategic planning process that took into account the views, needs and aspirations of all key stakeholders...

The reality is that unless you think tactically about how you will achieve your goals, objectives etc your chances of succeeding will be diminished.

A tactic or tactical planning can be defined as:

- A plan for attaining a particular goal
- A manoeuvre, or action calculated to achieve some end
- The identification of critical projects and activities in support of strategic plans – this involves a more detailed review of your opportunities.

The key words here are 'manoeuvre' and 'calculated' as they inform the way you should think through the various actions you will need to take to achieve your objectives and goals i.e. what do I / we need to do to

Broadly there are two main types of planning tactic / actions - written and unwritten

Tactical thinking and a tactical approach should consider:

- Relationships building i.e. what are the key relationships that need to be maintained, or developed for us to succeed? What can we do to improve these relationships or form these relationships?
- Stakeholder involvement i.e. who are the key influencers that we need to understand and have on side to succeed? Who holds the key or power to help us succeed? How can we help them succeed?
- Communication i.e. what are the key messages we must deliver to improve our chances of success – both publicly and privately?

Tactics Scenario

You run a Council library service that provides the community with access to the Internet, various online resources, computers and a wireless network.

The technology is provided and supported by a separate department of the Council (IT).

Response times for support don't meet the expectations of staff or customers, software and hardware is infrequently updated, and the quality of the services, time taken to repair breakdowns etc has created a number of complaints. Front line library staff are having to handle these complaints and there is very little support forthcoming from Council's IT department. The library service appears to have a lower priority than other areas of Council.

Example Goal

Library public access technology will be regularly updated, accessible and well supported

Example Objectives

- Within 2 years all library technology will be upgraded
- Within 6 months a customer (end-user) focused service level agreement will be developed between the library and Council IT
- Within 12 months library staff technology skills will be upgraded and recognised

Example Strategies (KRA)

- Weekly meetings will be held between Council's IT Manager and the Library Manager
- A service level agreement between the library and Council's IT department will be drafted and finalised by ...
- Library technology funding allocation priority will be reviewed by ...
- Training plans will be developed to increase library staff technology skills
- Library staff will be taking a more active role in technology troubleshooting

Balanced Score Card Planning Model

There are many models employed by strategic planners. An approach worthy of consideration is the *Balanced Score Card* model i.e. a strategic management system based upon measuring performance across all aspects and areas of an enterprise: financial; customer; internal process; and learning and growth. This approach is particularly relevant to libraries as it considers the 4 major perspectives:



That is:

1. **Customer Metrics:** What we want to achieve/deliver for the customers
2. **Learning and Growth Metrics:** What we want to achieve for ourselves e.g. the skills we will need to deliver our customer objectives and strategies
3. **Internal Business Process Metrics:** What internal business processes and business rules will we need to develop and implement to achieve our objectives and strategies e.g. policies, procedures and standards
4. **Financial / Resource Metrics:** What resources will we need to have in place to deliver our objectives and strategies e.g. financial (operating and capital budget), income (grants, customer fees and charges etc); staffing etc

These **4 perspectives** should be considered and where applicable addressed to ensure optimum success in delivering your strategies e.g. when considering, and developing meaningful objectives, KRAs, etc to fulfil your goals. The earlier customer service goal example: *Library public access technology will be regularly updated, accessible and well supported*, provides a case in point.

What types of questions need to be asked and addressed to successfully deliver this customer service goal?

Questions could include:

- Do we currently have the staff skills to achieve this strategy? What skills are missing or need improving/updating? (Learning & Growth)
- Do we currently have the policies, procedures in place to support this strategy? What's missing? What needs to be reviewed / updated? (Internal Business Processes)
- Do we have sufficient financial resources in the current and/or future budget to help us achieve this strategy? Do our suppliers have sufficient resources to assist us? Are there any grant opportunities or income opportunities we need to consider if we are to achieve our strategy? (Financial /Resources)