

Self-Assessment and Improvement Identification

Self-Assessment Meeting Invitation Email Template

From: <Assessment Facilitator>

Date: <Date>

Subject: TAM Self-Assessment Meeting; <Target Area> within <Process Focus>

To: <Members of Assessment Team>

Cc: <Project Sponsor>

You are invited to attend a self-assessment meeting for <Target Area> within <Process Focus>

This meeting will give you the <Target Area> overview and context. You will help complete self-assessment activities for <Target Area> which includes establishing current state of practice, documenting the desired state of the practice, and identifying improvements to close the performance gap. We will be using the supporting digital tool to aid in this process.

Attached are the previous meeting's minutes and <Guidebook Materials> that should be reviewed prior to this meeting.

Here is a link to the digital tool: www.dataassessment.tam-portal.com.

The 90-minute meeting is scheduled for <Meeting Date and Time> at <Meeting Location>. Please reach out if you will not be able to attend or if you have any questions.

Thank you,

<Assessment Facilitator>

Self-Assessment and Improvement Identification

Self-Assessment Meeting Agenda

<Meeting Date>

<Meeting Location>

Objectives: Complete self-assessment activities, document current and desired state of targeted area, and identify potential improvements to close performance gap.

Targeted Area: <Targeted area>

- | | |
|-------------------|--|
| 10 Minutes | Process Status Review and Meeting Objectives <ul style="list-style-type: none">• Previous meeting review & current meeting objectives |
| 10 Minutes | Area Overview and Context <ul style="list-style-type: none">• General area overview |
| 60 Minutes | Self-Assessment and Improvement Identification <ul style="list-style-type: none">• Establish current state• Document Desired State• Identify Improvements |
| 10 Minutes | Closing Discussion <ul style="list-style-type: none">• Closing Comments or Questions• Action Items• Next Steps |

Self-Assessment and Improvement Identification

Follow Up Email Template

From: <Assessment Facilitator>

Date: <Date>

Subject: TAM Assessment Process Self-Assessment and Improvement Identification Meeting
<Target Area> within <Process Focus> Follow-Up

To: <Members of Assessment Team>

Cc: <Project Sponsor>

Thank you for attending the <Target Area> within <Process Focus> Self-Assessment and Improvement Identification meeting.

The key conclusions discussed in the meeting were <Meeting Summary>. For our next step, we will be focusing on <Next Target Area>.

In order to facilitate the completion of the upcoming self-assessment meeting, it is important for you to review the supplemental guidebook materials for <Next Target Area>. These include the data life-cycle framework and the element-level response templates. You may also review the assessment elements, benchmarks, and potential improvements here:

www.dataassessment.tam-portal.com.

Attached are the meeting's minutes and <Guidebook Materials> that should be reviewed prior to the next meeting

Thank you,

<Assessment Facilitator>