HIGH IMPACT ORGANIZATIONS

The What, Why, and How to

~~High Impact~~ Connected Organizations

The What, Why, and How to

~~HIGH IMPACT~~ integrated ORGANIZATIONS

The What, Why, and How to

ABSTRACT

Organizational impact is highly sought-after but difficult to plan for and even more difficult to measure. Many traditional metrics rely on data that is important to division managers but lacks meaning to others outside. With this gap in mind, this discussion turns traditional metrics on their side to look at organizational performance from the vantage point of the stakeholders. The goal? Ultimately to create a more lasting, sustainable operation and organization that is knit together towards a common mission and purpose. To start, we will take a brief look at today's common metrics focused on people, increasingly plant, and program results (profit is typically less applicable in the federal sector).

This will demonstrate the disconnect between what we rely upon internally to run an effective operations and what our "clients" view as necessary for them to do their best work. We'll explore the concept of organizational stewardship which includes an expanded view of the role and responsibilities of today's managers while reviewing techniques to begin the challenging task of baselining and measuring impact.

WE HAVE A PROBLEM

It's not an insurmountable problem but a nagging, irritating issue. We all crave impact. It's essential to who we are—a need to breath, to be seen and heard, and to have the ability to affect change in the world. Our shared angst, anxieties, and frustrations all tie back to these basics. This presentation is about breaking through barriers, getting people onboard, and amp-ing up progress —to benefit our organizations, build our legacy, and make the time away from everything else worth it.

WHY IS THIS?

We often miss opportunities to have greater impact and influence on the strategic direction and viability of our organizations.
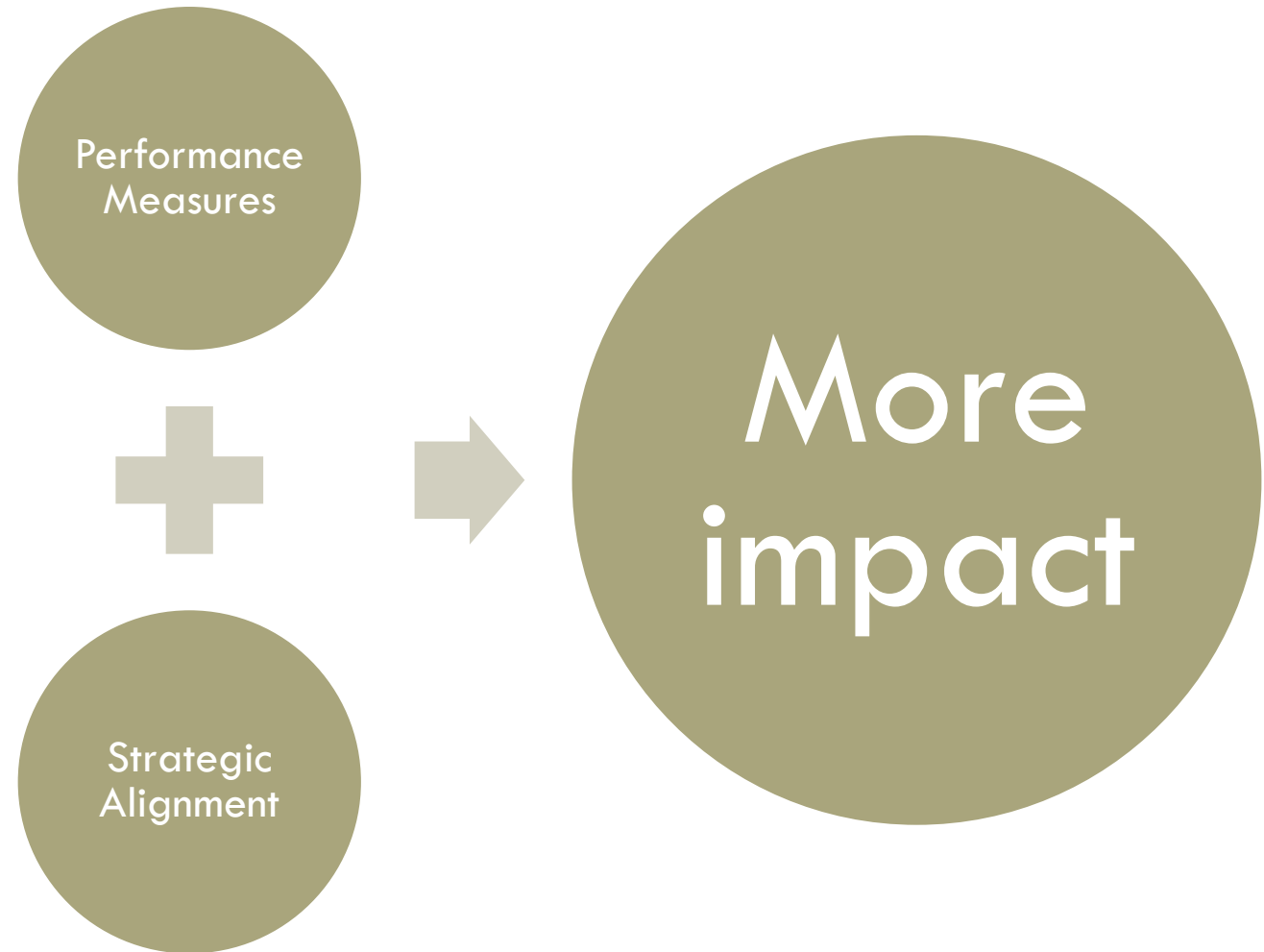
Why?

It's part history, part culture, and part self-inflicted censorship. We typically focus on behind the scenes operations and being responsive when called upon

MY GOAL

My goal? Share ideas on how performance measures and strategic alignment will improve your impact

What's the upside? Better…
- Return for us as individuals for our time invested
- Stewardship of organization we care about
- Opportunities for our teams
- Business and program success

Performance Measures

Strategic Alignment

More impact

WHAT WE'LL COVER

Agenda

Who I am

What typically matters to us, our leadership, and the disconnect

Case for change

How?

Recent, real life example: National Park Service

Session Summary

Organizational impact is highly sought-after but difficult to plan for and even more difficult to measure. With this gap in mind, this discussion turns traditional metrics on their side to look at organizational performance from the vantage point of the stakeholders.

✓Today's common metrics

✓Disconnect

✓Advancing asset stewardship, expanding roles and responsibilities

✓Measuring impact
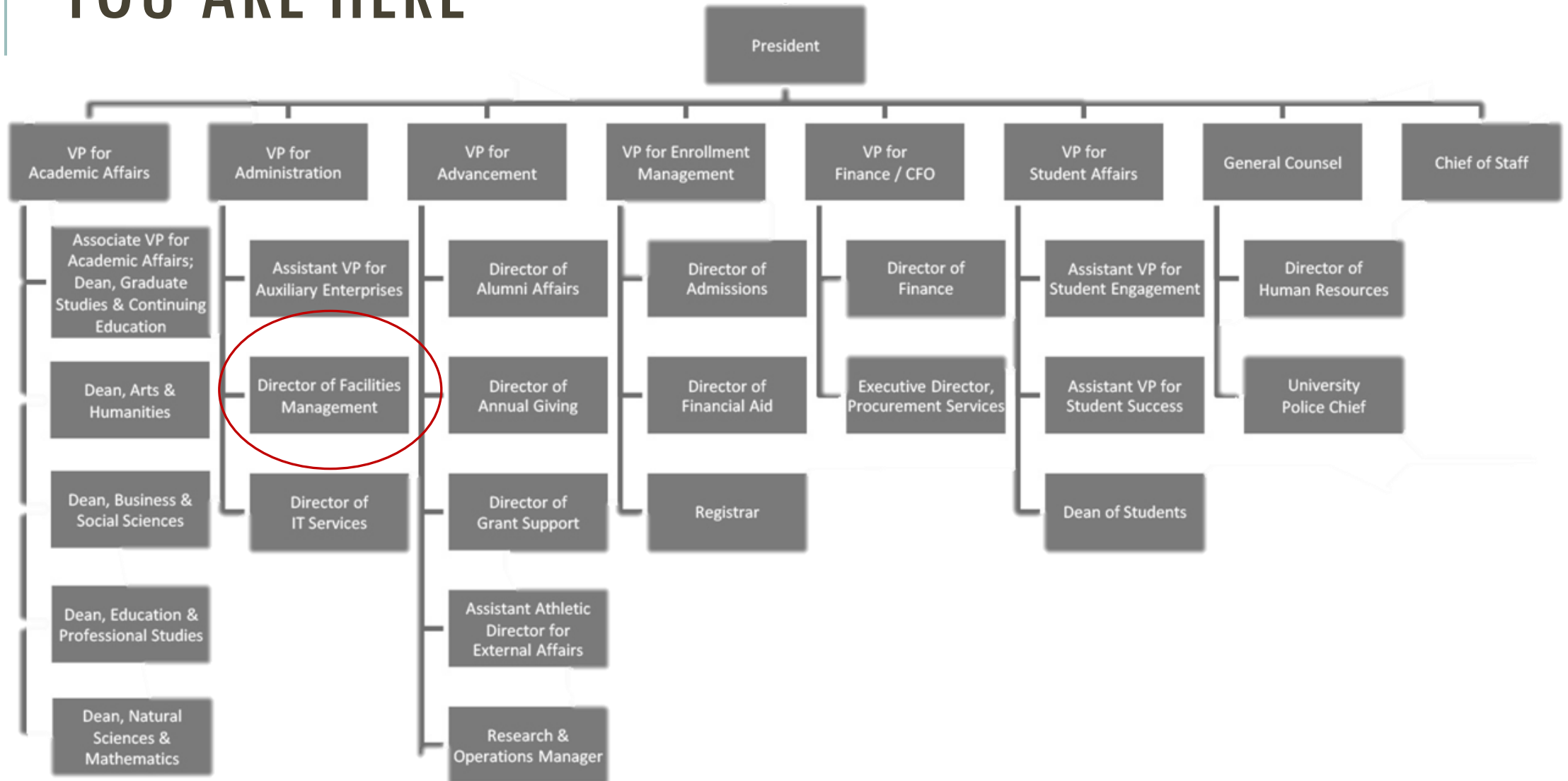
INTRODUCTIONS: HI, I'M ROBIN.

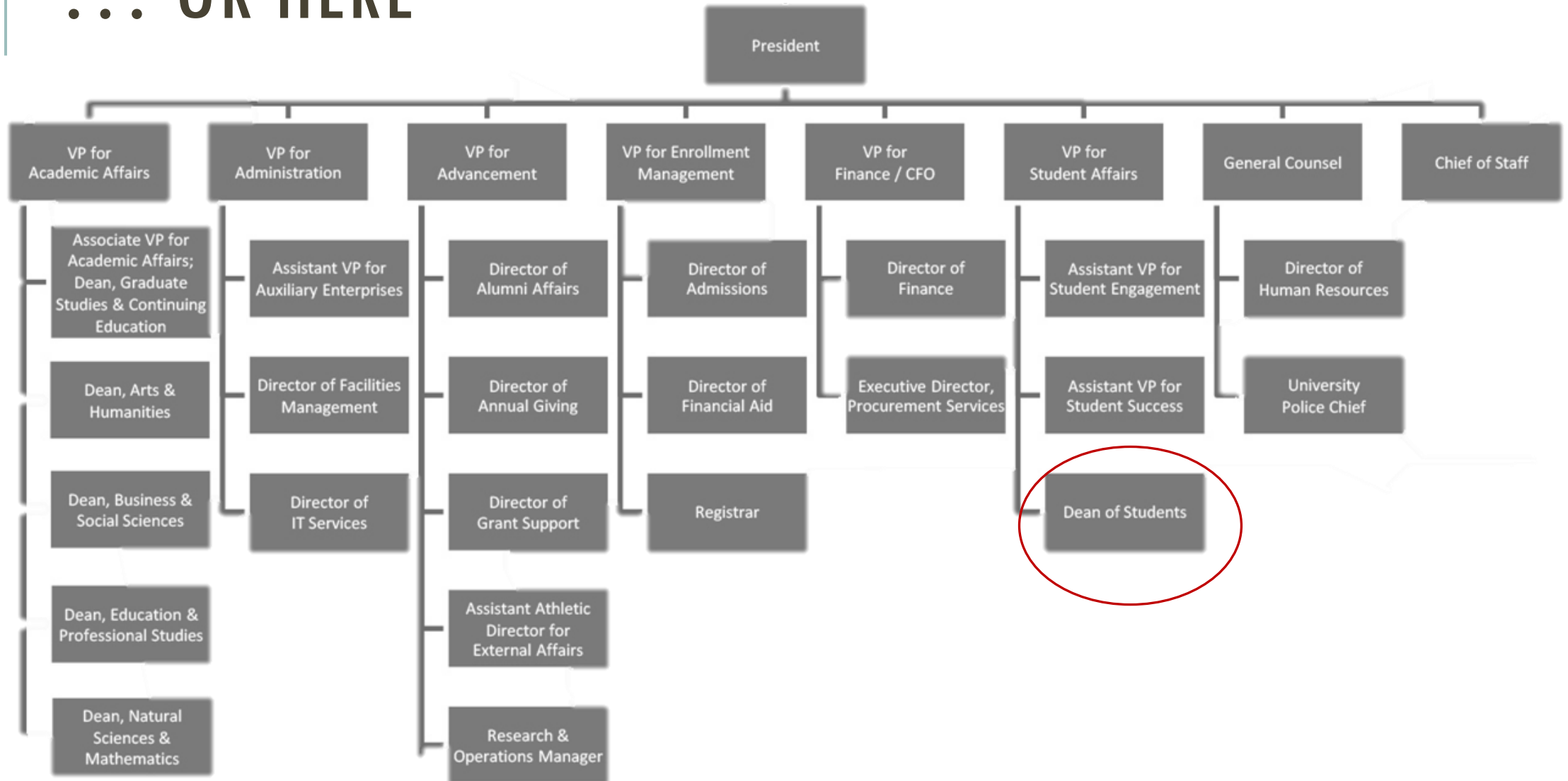From the outside looking in, a consultant's perspective

16 years working with clients in strategic planning, data and analysis, communications, and project management

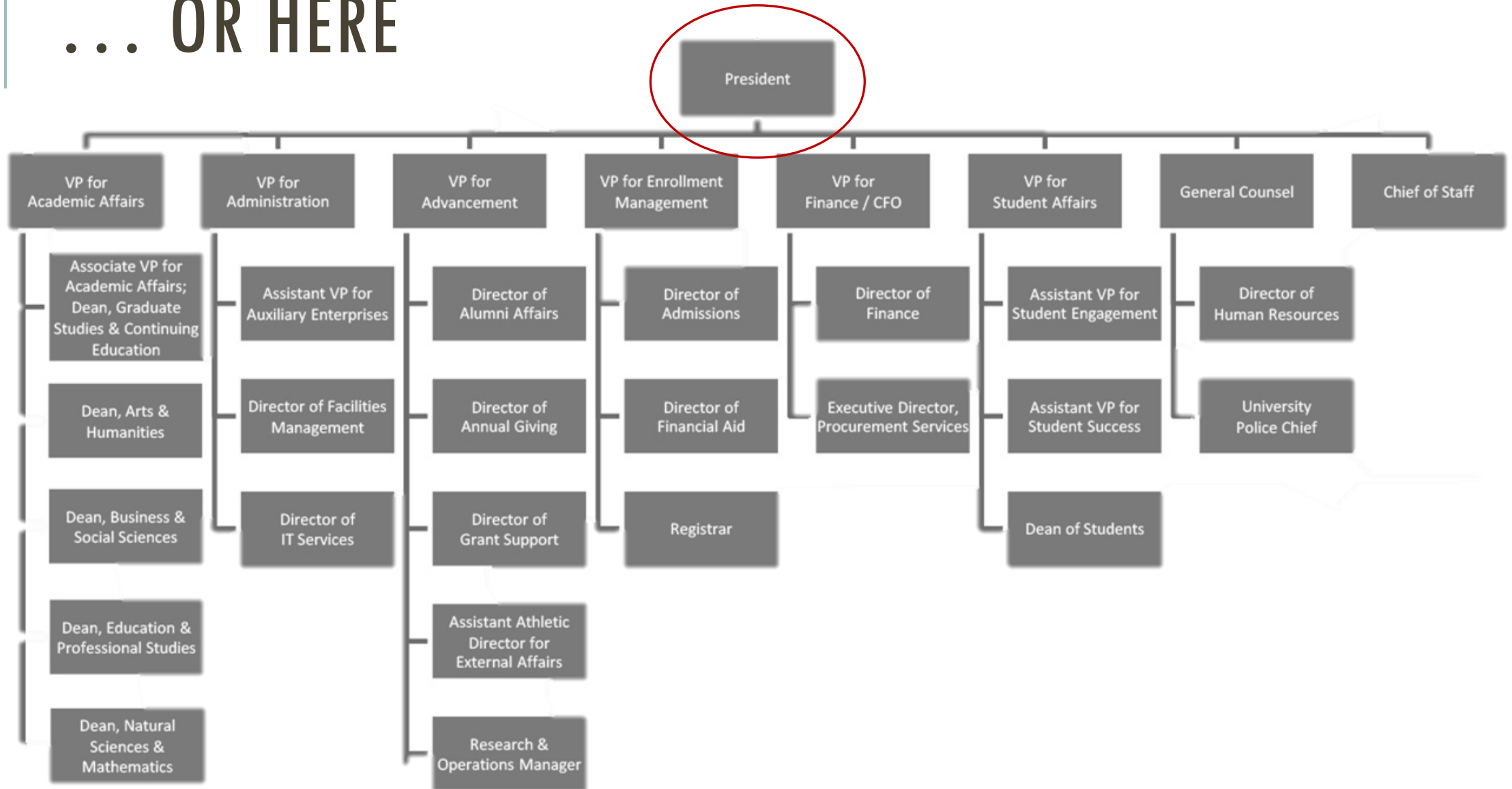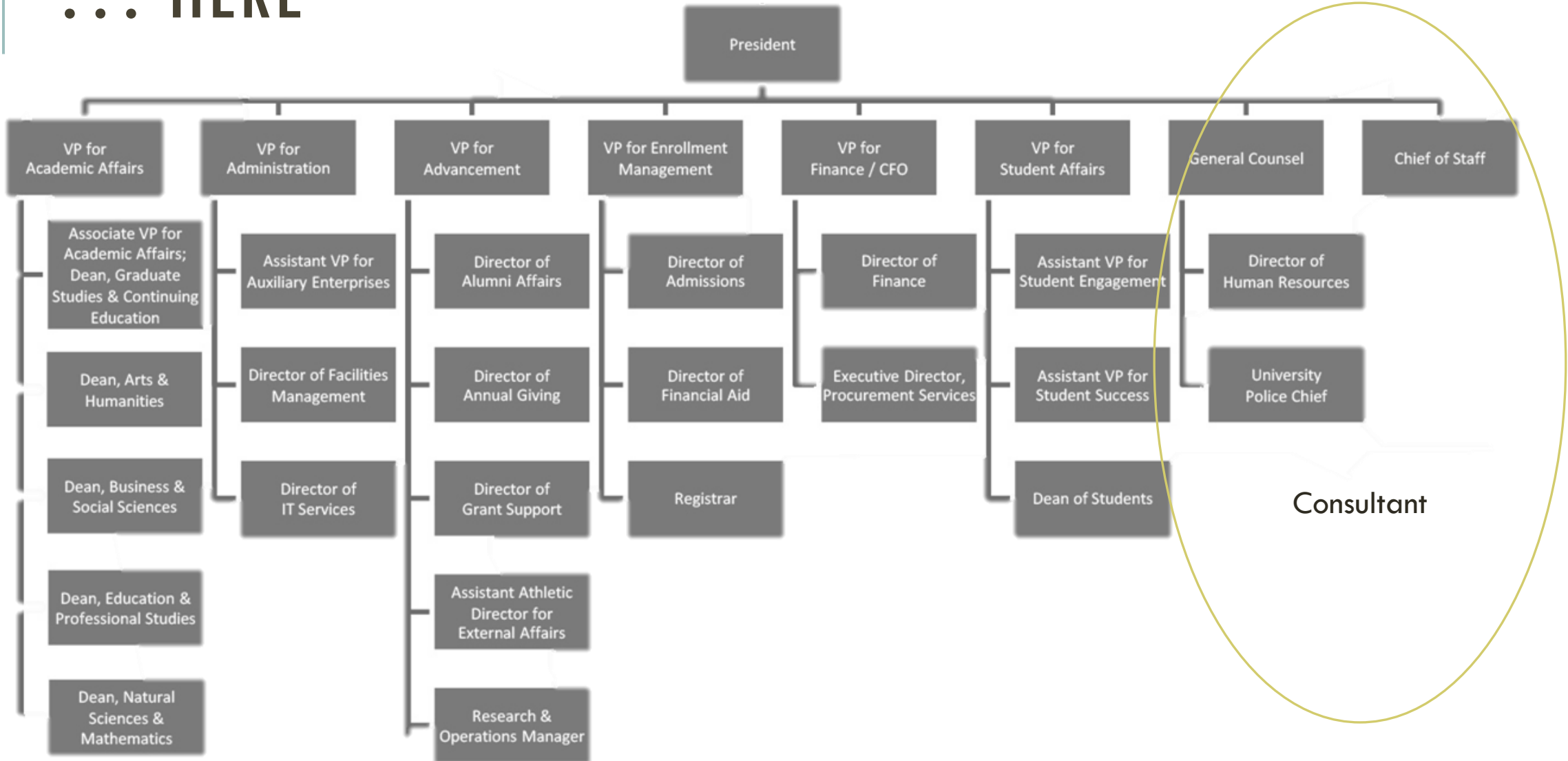Obsessed with figuring out how to make organizations (including my own) more effective

YOU ARE HERE

… OR HERE

… OR HERE

… HERE

AS PROFESSIONALS, WHAT MATTERS TO US?

Day to day, we're concerned that

- Staff have clear direction
- We're on track for our next project milestone
- Everyone has access to the information they need
- People are busy, and
- We're responding appropriately to customer requests.

Longer term, we concerned that

- Communication is improving
- Employee morale is high, people feel connected
- Out year needs are covered in the budget
- Plans are in place for major investments
- Sufficient resources are available to accommodate changing, growing workforce
- Staff are efficient with their time

ISSUES WE TALK ABOUT

Efficiency/effectiveness

Satisfaction

Utilization

Consumption

Inclusion

Risk and opportunity mgmt

Training

In addition to budget and personnel issues that are common across all professional disciplines, challenges include:

- Education and training
- Employee satisfaction
- Utilization
- Diversity and inclusion
- Delivering on commitments
- Innovation

- MEASURE Evaluation, through U.S. Agency for International Development (USAID) and the U.S. President's Emergency Plan for AIDS Relief (PEPFAR)
- Balanced Scorecard Institute, Key Performance Indicator (KPI) and Performance Measure Development
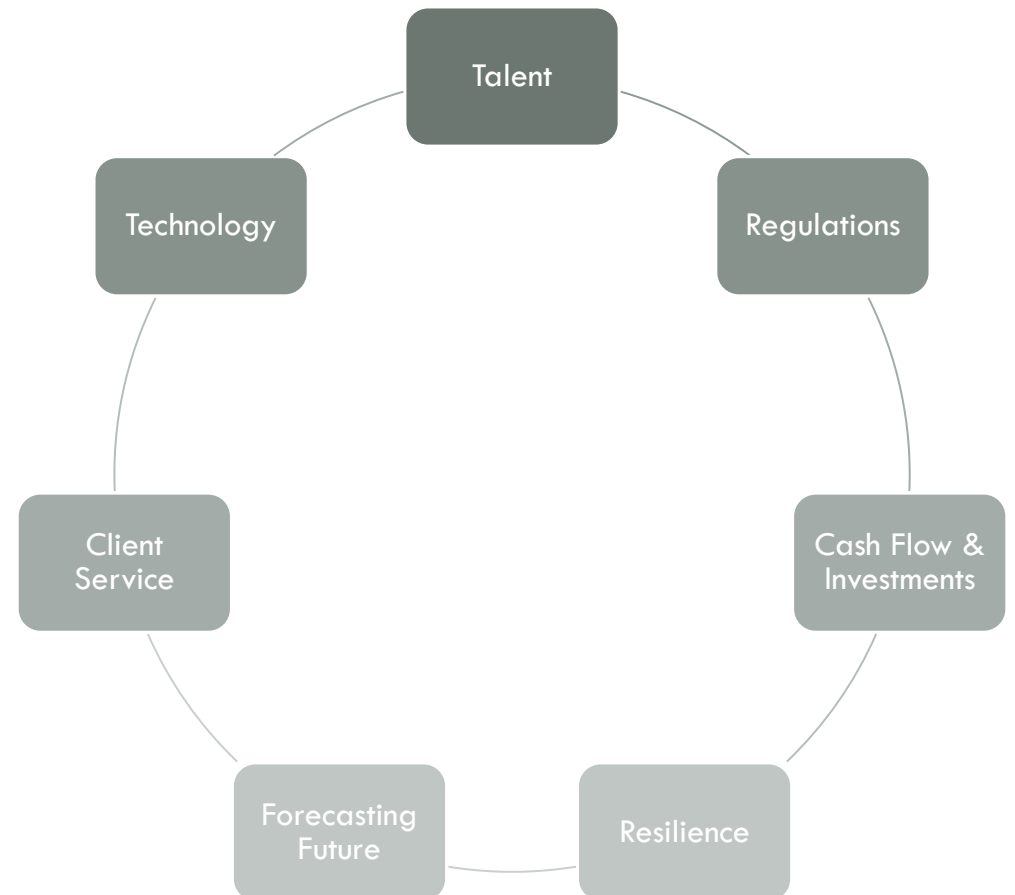
ISSUES CEOS TALK ABOUT

Continuously enhancing client service

Agility and business resilience

Making technology a competitive advantage

Finding and retaining the best talent

Positioning in a global marketplace

Wall Street Journal, The Top Issues CEOs Face These Days, March 19, 2014

BRIDGING THE DIVIDE

Us	Bridging Metrics	Them
Delivering on commitments, utilization	• Operational efficiencies and cost savings • Reinvestment ideas— additional client service staff, customer routing analysis, call center configuration and placement, employee empowerment	Enhanced client service
Education and training	• Failure root cause and trend analysis, demonstrating that systemic issues are being addressed • Host cross-division table exercises to quickly work through road blocks to train plan • Establish interim systems, processes • Measure program agility, how quickly could we shift to a new delivery model, add a new product/service?	Agility, business resilience
Innovation	• Make case for hiring (or sharing) analytics officer • Include section on emerging tech and trends in every report • Combine data with other divisions— sales, employee turnover • New products/services to market	Making technology a competitive advantage
Employee satisfaction	• Integrate feedback from exit interviews, frequent questions during recruiting process, trends in offer declines or acceptances • Communication effectiveness (anonymous short quizzes or surveys following speeches, announcements of new initiatives, annual reports earnings calls, etc.)	Finding and retaining the best talent
Diversity and inclusion	• Increase in minority representation, increased representation of minorities at different levels of firm • More diverse hiring • Improvements in productivity • More innovation and creativity	Positioning in a global marketplace

MORE STRATEGIC MEASURES

Customer Relationships

Employee Satisfaction

Project Management Index

Intellectual Capital

Distraction Index

Trust Index

Straightforward, ready access to data needed

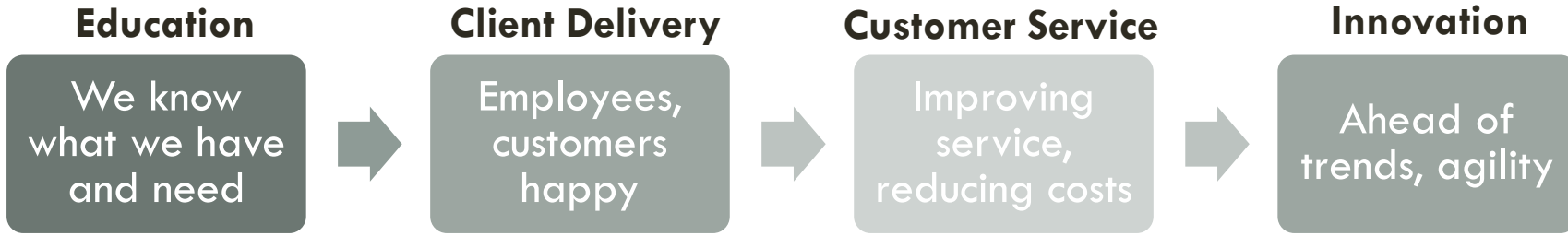Fresh perspective from creative combinations of existing data

New data needed via well-designed survey or other instrument— but tremendous potential
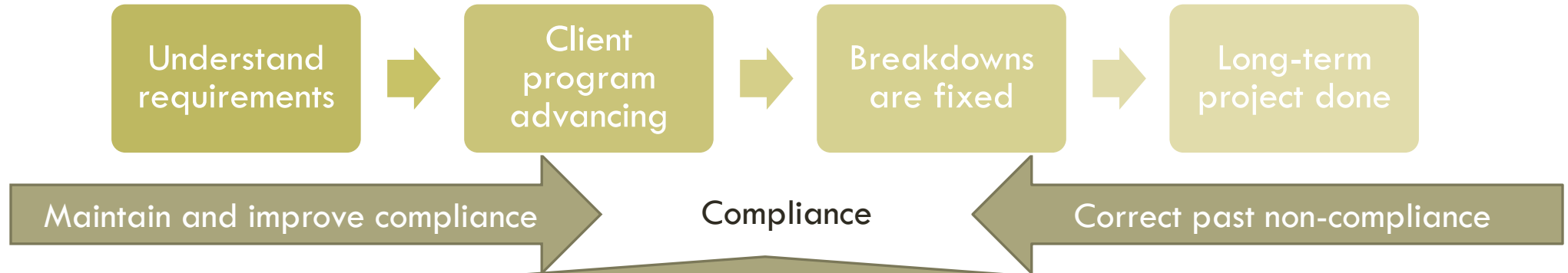
HOW TO DO THIS

Review current measures

Map metrics

Plan strategic conversations

Seek alignment

Jump in

Metric Map

Our impacts:
The difference we want to make

Education	Client Delivery	Customer Service	Innovation
We know what we have and need	Employees, customers happy	Improving service, reducing costs	Ahead of trends, agility

Our outcomes:
The goals we are aiming to achieve

Understand requirements	Client program advancing	Breakdowns are fixed	Long-term project done

Maintain and improve compliance → Compliance ← Correct past non-compliance

Our outputs:
Activities we do

Assess educational needs	Complete client work	Respond to issues	Plan, execute improvements

Our inputs:
The way we use resources

Our people, revenue, intellectual capital, community contributions, other resources

MEASURING WITHOUT MEASURING, SETH GODIN

As an organization grows and industrializes, it's tempting to simplify things for the troops. Find a goal, make it a number and measure it until it gets better. In most organizations, the thing you measure is the thing that will improve. Colleges decided that the SAT were a useful shortcut, a way to measure future performance in college. And nervous parents and competitive kids everywhere embraced the metric, and stick with it, even after seeing (again and again) that all the SAT measures is how well you do on the SAT. It's easier to focus on one number than it is to focus on a life.

Paypal and Chase and countless other organizations do precisely this: they figure out a metric, decide it's important and then create a department to improve that metric.

Consider the Chase Fraud Prevention department. It costs a credit card company (and especially their merchants) a lot of money when fraudulent charges are made, because they often have to eat the cost. So this department of thousands of people works to make the number of fraudulent charges go down at the same time they keep expenses low. Which sounds great until you realize that the easiest way to do this is to flag false positives, annoy honest customers and provide little or no fallback when a mistake is made.

Simple example: I regularly get an automated phone call from the bank with an urgent warning. But even when I answer the phone, the system doesn't let me ring through to an operator. Instead, I have to write every detail down, then call, wait on hold, prove it's me, type in all the information, and THEN explain to them that in fact, the charge was mine.

And this department has no incentive to fix this interaction, because 'annoying' is not a metric that the bosses have decided to measure. Someone is busy watching one number, but it's the wrong one.

Measurement is fabulous. Unless you're busy measuring what's easy to measure as opposed to what's important.

Strategic Converations

WHAT ARE THEY?

Tactical:
Focused on deliverables
Choose steps and processes
"We can't do it that way."
"That's not my job"
Creates plan to reach goal

Strategic:
Focused on the outcome
Chooses path of least resistance
"How can we make it work."
"This is everyone's job."
Chooses vision and plans backward

PLAN STRATEGIC CONVERSATIONS

Think creatively about possible, fruitful cross-division partnerships

Define for yourself and your team how you want to come across in the next management meeting

Tips from "Moments of Impact"*

1. Act like your competition

2. Make a clear distinction between the present state and future options

3. Turn the meeting into a game or simulation

*Moments of Impact: How to Design Strategic Conversations That Accelerate Change by Chris Ertel and Lisa Kay Solomon

WHERE TO START

We want to "show up" with a fresh mindset

Use current and revamped metrics that translate work we do into value to the organization, not just cost

Plan strategic conversations, demonstrate thinking outside the function

Find alignment with people, culture and connectivity

Deliver

Jump in

Mindset
Shift from reactive mode with a narrowly defined role to a strategic partner critical to the organization

STEP 01

STEP 02
Metrics
Review and refocus metrics, create bridge to leadership concerns

Conversations
Plan strategic conversations to demonstrate facilities value and role

STEP 03

STEP 04
Alignment
Seek alignment with leaders across the organization, work common issues

Deliver
Execute your plan, observe impact, adjust

STEP 05

KEEP IN TOUCH

Comments, questions, or follow up?

Reach Robin at
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You can also find me on LinkedIn, follow
me on Twitter @robincamarote, or on my
blog at goviepop.com

MARCH 2015

thank you

ROBIN & TIM

REFERENCE LINKS

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