



Example of Executive Report-Out for an Operational Assessment

Below is an example of a high-level summary “4-block” format for an operational assessment project. The goal of the assessment was to identify a program (series of projects) to achieve the opportunity as stated below.

Opportunity

- Improve customer satisfaction
- Improve customer service through reduce cycle times
- Improve employee satisfaction

Vision

- Perform an operational assessment of the business
 - streamline processes, increase customer satisfaction and reduce costs

Team Members

- Review Committee
 - Chairperson
 - Sponsors
- Project Teams
 - Core Team Leaders
 - Team Members

Benefits

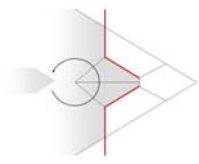
- Increased revenue (through improved customer satisfaction)
- Reduce operating costs 15-20%
- Reduce cycle times
 - Sales
 - Client Service Delivery
 - Invoicing
- Reduced front-line employee turnover

In the top two quadrants, we framed the opportunity or problem statement (current state) and established the vision (future state) of the project.

(In this case, the scope is limited to simply performing an operational assessment where additional projects will be identified to get us to the desired future state. As projects are identified, new slides with the specific vision of the project(s) would be created.)

In addition, it is always important to emphasize teamwork and thereby identify team members. Finally, the business benefits of the project are clarified and summarized.

There are many acceptable “4-block” formats...however, this format helps establish the “what is the problem”, “where are we headed”, “who” is on the project and “why” the business will benefit. (“When” is also a valid question which might be better answered with a separate timeline or schedule slide.)



The next (summary slide) would be a high-level status of the project...in this case the status of the assessment process (“what the assessment team accomplished”).

Status

The Operational Assessment is Now Complete

- ✓ Collected voice-of-customer, voice-of-business
 - Verified customer satisfaction drivers related to lead-time & quality
- ✓ Measured current state process, project benefits, productivity improvement goals
- ✓ Completed current state map / future state map
- ✓ Identified productivity and lead-time improvement projects (5 projects total)
 - Identified 62 actions assigned to their respective projects

The status summarizes “what the team did”, and below are the projects identified to achieve the desired future state.

Project	Improvement Type	Current State	Future State
Front-Line Retention	Employee Satisfaction	7.2%	4.0%
Sales Information Flow	Reduce Lead Time	12	3
Cost Reduction	* Productivity	\$233 / Delivery	\$186 / Delivery
Client Service Delivery	Reduce Lead Time (days)	42	30
Invoice	Quality	85.5% Yield	> 95.0% Yield

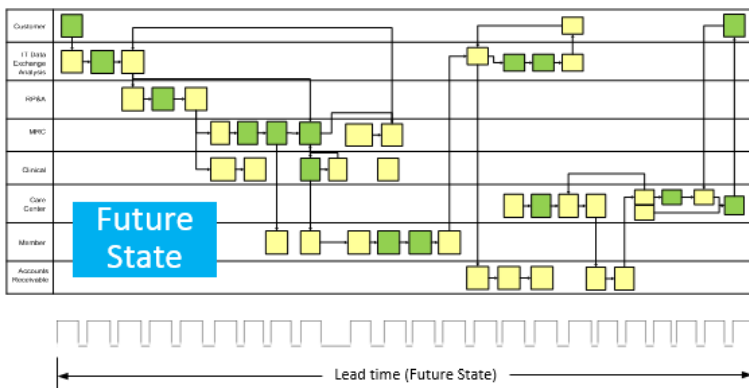
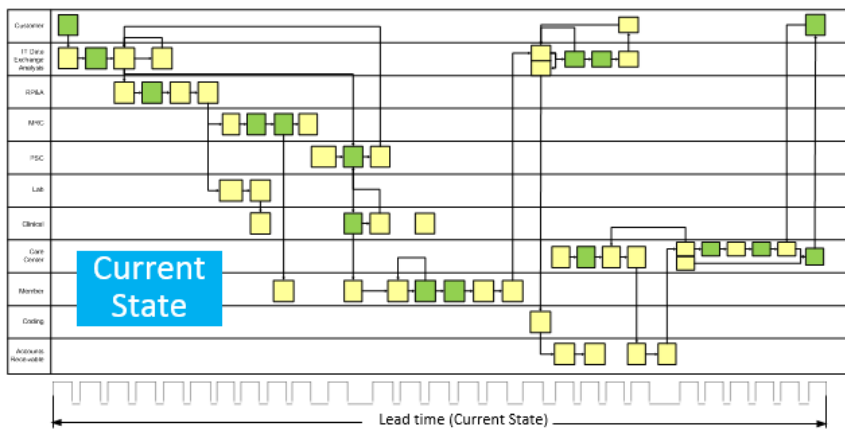
* At current volumes (~27,000/year), productivity savings = \$1.27 M

We now know “what projects” and “what value” those projects should deliver.



Assessment Details

Now for “how we got there”:



	Current State	Future State
Process Steps (Total)	62	44
Process Steps (NVA)	42	28
Hand-offs (swim lanes)	11	8
Loop-Backs	8	2
Lead Time (days)	42	28

This shows (graphically) the current/future state improvement in lead-time and process metrics. In addition to illustrating “how we got there”, we validated the relative improvement with process metrics.



Assessment Team Members

A photograph of the team members helps re-enforce teamwork and recognition, involved and empowered employees.

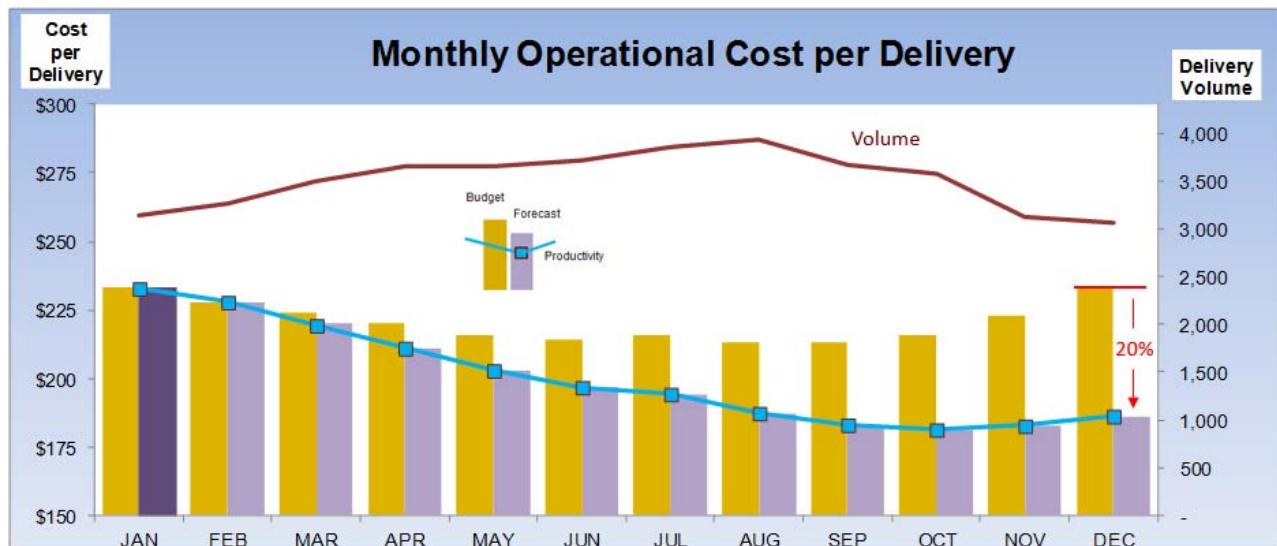


Special thanks! to: Michael, Juan, Charles, Debra, Loren, Nancy, Matt, Elizabeth, Vince, Jane, Lisa, Hector, Shawn, Nic, Donald, Julio, Lynn, Susan, Don, Reginald



Primary Tracking Metric

This metric is an estimate of project performance for the cost reduction component of the project; in this case, we forecasted 20% cost reduction from the current state (starting in January). The finance department would validate this.



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2016
YTD Cost per Delivery Budget	233	228	224	220	216	214	216	213	213	216	223	233	221
YTD Cost per Delivery Actual / Forecast	233	228	220	211	203	197	194	187	183	181	183	186	201
YTD Cost per Delivery Productivity	233	228	220	211	203	197	194	187	183	181	183	186	201

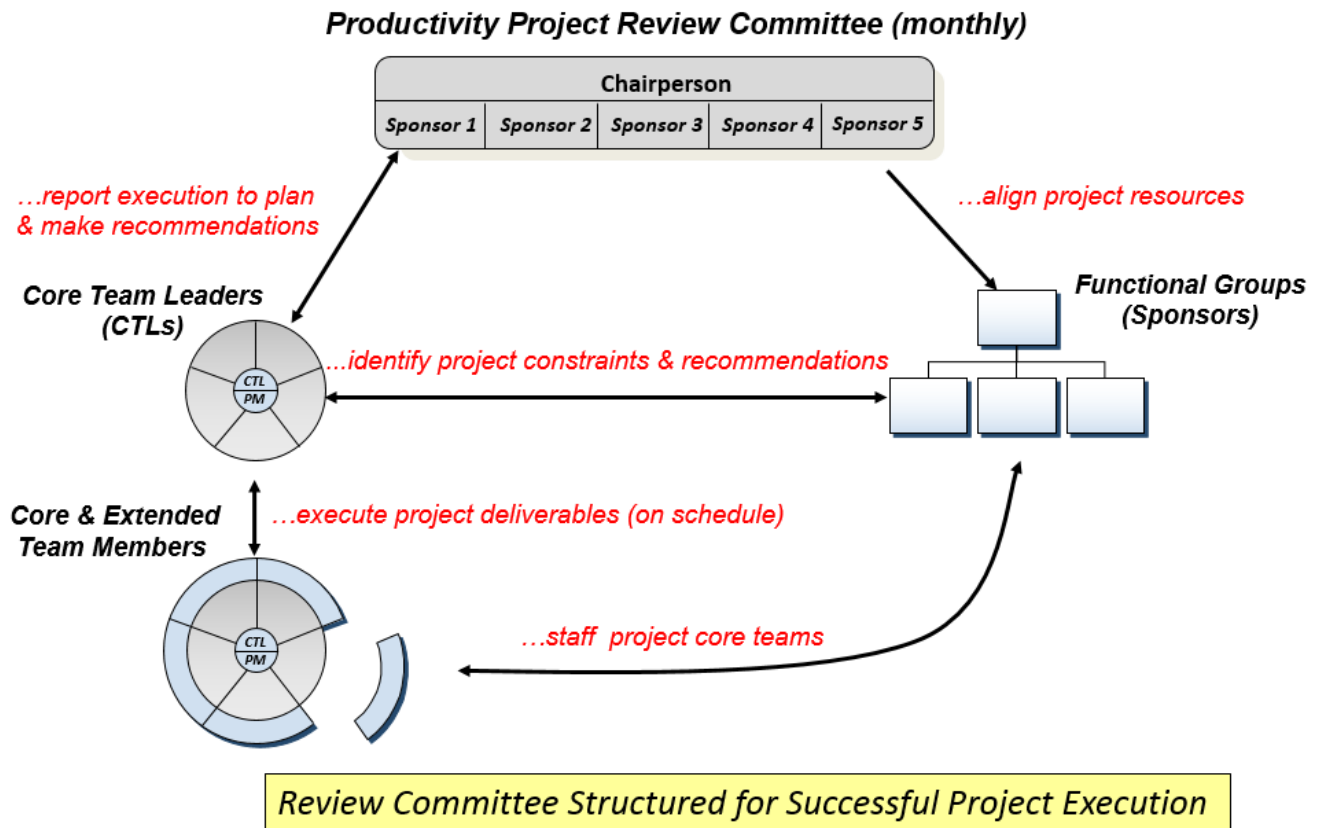
Similar Monthly Tracking Metrics Have Been Created for Lead Times & Retention

We now have a metric to assess the business benefit of the project(s) on an ongoing basis.



Next Steps:

Here we explain "the how"...how such a large initiative involving several projects would be set-up and governed.





Next Steps:

Finally, next steps bullet-points is a call-to-action...specifics to move the initiative forward.

- Identify project sponsors and team members
- Training and awareness (as needed)
- Clarify project plan details (deliverables, activities)
- Create project schedules
- Create productivity project slide deck
 - Finalize and summarize metrics and targets
 - Review plans with sponsors, core team leaders and team members
 - Clarify plans / identify recommendations
- Begin review committee meetings
- Execute project plans