Introductions

1. Who are you and where do you work?

2. What processes do you work with/on?

3. What questions do you have about process measurement? Or, what aspects of your process are you currently measuring?
Review

• What is CI?
• What is a process?

Why measure?

- MONITOR and REPORT: how well a process is working
- UNDERSTAND: where there are issues, errors, or delays
- DIAGNOSE: the root causes of problems
- ASSESS: whether performance has improved
- ESTABLISH: reasonable performance standards and models
**When should we measure our process?**

- Baselines
- Detailed Analysis
- Targets
- Relative Impact
- Rapid Tests

1. What process we’re measuring
2. How and when it starts and ends
3. Who the customers are

**Getting Started**

- Process
- Improvement
- Customers
- Where to start
- People who do the work
- Process metrics

**To measure, we need to first know...**

1. What process we are measuring
2. How and when it starts and ends
3. Who the customers are

**Remember these?**

(The CI Fundamentals)

**CI Fundamentals**

Fill out the table below for a process that you have in your work.

- **Process**
  - A process is a series of steps or actions taken to achieve a particular end.

- **Customers**
  - A customer is a recipient of or is directly impacted by a service or product.
Fill out the Process section of the worksheet

What to Measure: Step 1

Your measures should help you answer important questions about the process from

- Customers of the process
- Leadership
- Process staff
- Other stakeholders

What do you want to know...and why?
What to Measure: Step 1

1. What are your customer requirements?
2. What do you want to manage or improve?

What does the process do? → Who is it for? → What do they want? → How will you know if they got it?

Is the process working?

What does it mean for the process to be working?

Is the process meeting requirements?

Is the process efficient?
Fill out the Requirements section of the worksheet.

What’s the Point?

Identifying your customer and regulatory requirements can be a major effort!

CAUTION

Skip this step at your peril!
What to Measure: Step 2

Measures can address

- Operations
- Performance
- Customer experience
- Improvement

A Good Measure

- Easy to Understand
- Important to the Customer
- Unbiased and Objective
- Close to the process, not lagging
How to Measure: Measure Types

- Time
- Cost
- Quality
- Customer Experience
- Volume
- Complexity
- Root Causes

How to Measure: Where to Measure

- Input
  - Information
  - Customer requests

- Process
  - Staff
  - Technology
  - Time

- Output
  - Customers
Fill out the Metrics portion of the Measures section of the worksheet

Process Measures: Metrics

Process Data Sources

- Process Maps
- Financial Reports
- Time or Observational Studies
- Data Base/System Reports
- Audits/Quality Assurance Data
- Voice of the Customer
- Check Sheets
### Example: Swim Lane Map

![Swim Lane Map Image]

### Swim Lane Map Metrics

<table>
<thead>
<tr>
<th>Worksite Inspection Process</th>
<th>Current Qty</th>
<th>Time</th>
<th>Future Qty</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasks</td>
<td>85</td>
<td>16 hrs</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Waits</td>
<td>22</td>
<td>57 days</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Handoffs</td>
<td>35</td>
<td></td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Decisions</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>File/stores</td>
<td>32</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total time</td>
<td></td>
<td>59 days</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Fill out the Sources portion of the Measures section of the worksheet.
Document Your Measures!

For each metric, document

- Purpose
- Scope
- Target
- Formula
- Source
- Contact/Responsibility
- Reporting
- ...

Displaying & Communicating Data

- Consider your audience and their needs
- What story do you want to tell? What are you trying to communicate?
- Charts are cool! But sometimes numbers are better
- Test your charts
- Start axes at zero
Use Your Measures!

- Not using a measure? Nobody cares? Stop collecting it!
- Share your data!
- Establish and document responsibilities for data collection, reporting, and response!

Be a Data Hero!

Change the narrative
Ethics, Risks, and Cautions

Rewards

Punishments

Apples to oranges comparisons
without explanation

Go Out and Measure!

• Know your customers
• Know what they want
• Know if you’re giving it to them
• Know your process
• Know how it works
• Know where it doesn’t work
• Know how to fix it