



A MINI DASH WOULD DO IT

Background:

As a service provider to other small and medium business, and some government departments, the organisation was apparently a very busy workplace. Phones rang and the fax went semi-continuously, not to mention the email flow that was like a river in full spate.

Operating for almost 10 years, the team had grown from a sole operator to a nice team of like-minded professionals with quite a thriving list of repeat business. They were amongst the healthy niche players in the industry, having escaped a round of rationalising in the industry that had seen several companies disappear without a trace.

New business had always felt a bit more like good luck than good management. Remaining committed to the ethical standard that they set in their work, the team was keen to analyse and replicate their successes to grow the organisation further.

The Problem:

The owner was not shy of investing in technology to run the business better - such as making fair use of databases - but how else could the business be cranked up more? He professed himself to be generally satisfied with the returns made, but 10 years on was looking at pulling back. "I want to be comfortable that things remain under control, but I don't want to look at issues every day. I don't mind a "steady as she goes" level of performance, but I want to stay confident that it *is* steady and it *is* going - without me being here all day, every day."

The team well and truly acknowledged the need for a better handle on the overall performance of the business. But while gathering information and synthesizing it were core skills for the team, they felt confident only about their area of expertise. When calling the action and setting priorities in other areas - especially in financial matters - they were rather more tenuous. "We are not accountants. What if we miss something important that the owner needs to know?" was the common view point.

Looking a little jaded, the owner put it pretty succinctly when he said: "When I was a lot younger, driving was pretty easy because I had an original Mini and there was just one big dial to watch. Now I am caught by my own success - I have a car that many people would kill for, but it has a million dials, lights and buzzers that go off whenever the least little thing wobbles. I don't know whether to worry or not - just like here in the business. What exactly should I be worrying about and how much, and when will I find the time to look at all the information that could be

available to me, let alone have time to think about the action to take?"

The Consultant's Work:

To get started, the consultant had gone to the work place to just watch the business run for a day or two. It was everything that the senior manager had described in the initial discussions - busy, interesting, lots of satisfied customers, a few wrinkles and bumps along the way - and a mass of opportunities not able to be actioned for lack of time and confusing priorities. Of course, there was some truly intense listening to the owner - about starting and growing the business, the successes, the not-so-successful experiences, his calibrated eyeball for running the business profitably and his hot buttons for what he worried about through the working week. Observations made included an estimate of the time taken for key tasks and the proportion of the day spent by each person on certain classes of tasks.

Putting it all together, the consultant was able to formulate a pretty accurate picture of the inputs, outputs and outcomes of the organisation, and the causal links between them. The model was validated by testing and observation over several weeks, by which time all the team members agreed that it represented the business really rather well - and by being selective, it was nowhere near as complicated as they had anticipated it might be.

One prime revelation was that a truly horrible amount of time was taken up with simple, quite homogenised tasks that added little likely value for fee paying clients. Some easy eCommerce solutions moved this load out to an internet site to get it done much more cheaply, but also relieving the team of this load.

Equally, both financial & non-financial indicators had been kept for some time, but no one really analysed the meaning of the results. The consultant made a one-time comprehensive analysis to identify those that were demonstrably linked to performance of the organisation, and combined them with some external sources of data (such as which of their client groups were in thriving industries, and which individual clients were the most successful) to provide a more complete picture of the organisation's health.

By prototyping and validating the model further, a very simple "dash board" display was developed using standard office software. This met the owner's visibility requirements and could selectively keep the team's eye on the ball - thereby creating some time for better updating of key databases and other more thoughtful work, according to sensible priorities.