SIMPLER

Sounds like this:	Metrics to collect:	What to ask:	How to display for the event:	How to display after the event:
"It's a really complex, complicated, convoluted process." "No one really understands the full process."	Number of: • Process steps • Handoffs • Loopbacks • Decision points • Delays • Forms • Functions • Baseline info	• "How many different forms are used in the process?" • "How many people (offices) are involved?" • "What is the volume? How many of these do you process in a year, a month, or a day?" • "Are there times when volume differs?" (e.g., seasonal fluctuations)	• Present baseline info as raw numbers in scoping document NOTE: You will not have most of this info at the start of the event • Photo with all the forms used, or a chart listing each form• Run chart showing volume by month for past year, in time order • Pie or bar chart showing the different types processed	• Chart showing the "before" and "after" process mapping data • Chart listing each form previously used, with eliminated forms crossed off • "Before" and "after" pictures showing new forms and old forms • Success story or quote from team members communicating the "aha moments" they had when mapping the current-state process
"This touches so many hands (or work units, offices, agencies)."	• Handoffs • Number of staff involved	• "How many people are involved in this process?" • "Is there a lot of back and forth between employees?"	• Present the raw information in the scoping document • Spaghetti map showing work flow between areas	• Spaghetti map showing the new flow compared to the old
"There seems to be a lot of time where it sits waiting for someone (or something)."	• Delays	• "How often is an employee (office) waiting for another to do their portion before they can move forward?"	• This information will most likely come from the current-state process map	• Total delay time compared to the new delay time • Bar chart visually showing the difference
"Customers are confused." "There are so many forms, and people have to supply the same information over and over again."	• Number of forms	• "How many forms do you have?" • "When was the last time these forms were reviewed?" • "What are the main complaints about the forms?" • What questions are usually answered incorrectly?"	• Raw number of forms will be presented already • The focus should be on making the forms clear and concise without duplication	• Quantity comparison will be presented already (see above) • Chart showing the forms used before and the ones used after • Raw count of how many times a customer was asked to supply a piece of simple information (like their name or ID number) • Comparison of form length before and after

FASTER

Sounds like this:	Metrics to collect:	What to ask:	How to display for the event:	How to display after the event:
"This process takes too long."	• Lead time • Cycle time	• "On average, how long does this process currently take?"	• Raw presentation of the information in the scoping document	• Chart showing old vs. new processing time, cycle time or lead time
"Customers are complaining that it takes too long."	• Lead time • Cycle time • VOC • Time to complete form • Backlog • Time studies	• "How quickly do your customers think this should be taking?" • "How long does it currently take for a customer to complete the form(s)?"	• VOC results (as they pertain to time) in chart or bullet-point form • Present the raw findings or estimates in the scoping document • Present testimonials from customers complaining about the forms/process	• VOC results for customers surveyed after the change that indicate they are satisfied with the new timelines • Bar-chart comparison of "before" and "after" times to complete forms/process
"There's a lot of work 'in queue' that my staff just can't get to."	• Backlog	• How many items are past due? • How long past due? • "Why does this backlog exist?" (Possibilities include increase in volume, short-staffed, etc.)	• Raw presentation of this information • Photo of the backlog (stacks of paper, filled boxes, etc.) • Calculation of how long it would take to clear out the backlog given the current process (processing time x backlog number)	• Photo of the original backlog next to a picture showing no backlog or a significantly reduced backlog • Projection of when the backlog will be eliminated with new procedures
"We are not meeting the standard guideline (requirement, law) for timeliness."	• Time studies • Lead time • Cycle time	• "What laws (standards, policies) specify a timeframe?" • "How long should the process be taking?"	• Verbiage indicating the standard processing time (copy directly from the law, policy, procedure, etc.)	• Visual showing how the new timeline corresponds to the standard (law, guidelines, requirements)

BETTER

Sounds like this:	Metrics to collect:	What to ask:	How to display for the event:	How to display after the event:
"There are so many errors and mistakes."	• Number of errors (defects)	• "What is the frequency of errors?" • "How often is there rework or back and forth because of mistakes?"	• Raw number of errors that occurred during the past 12 months • Percentage of customers that had errors • Amount of time associated with these errors	• Projection or real results for number of errors after event • Percentage of customers projected to have errors after event • Amount of time redirected to other tasks due to less error fixing
"Customers are complaining to the legislature about this process." "We did a customer satisfaction surve, and the results could be better."	• Customer satisfaction • "Voice of the customer" survey, focus group, feedback forms, etc.	• "Have you surveyed your customers? If not, can I assist you with a survey to get their viewpoints?"	• Bullet points summarizing the results of customer surveys and/or focus groups	• Comparison of "voice of the customer" before and after
"We get a lot of calls asking about information that's provided on our website."	• Direct customer benefits • Number of current forms • Complexity and length of current forms • Ease of use of the website	• "How many forms do you have?" • "When was the last time these forms were reviewed?" • "How long are these forms?"	• Raw number of forms • Raw number of average length of forms • Picture or chart depicting all the different forms • Number of unique visitors to website	• Chart or picture indicating the new set of forms vs. the old set

LESS COSTLY

Sounds like this:	Metrics to collect:	What to ask:	How to display for the event:	How to display after the event:
"My agency is worried about how much this process costs." "Our budget for this process is really tight." "I'm worried this is going to make the news."	• Direct agency cost savings • Secondary cost savings	• "What is your budget for this process?" • "How much does it currently cost?" • "What are your material (equipment, contract) costs?"	• Raw statement of costs (consider costs associated with materials, equipment, inventory, space, contracted services, or waste) • Break cost down by category in a pie chart (if possible) • If spending more than budget, show comparison in bar chart	• Calculate direct savings and present the raw number • Comparison of previous costs vs. new costs in a chart or bar chart
"We are working overtime in order to meet the demand." "We need temporary workers to get all the work done."	• Overtime hours (OT)	• "How much overtime was there last year?" • "What was the reason for the overtime?"	• Raw statement of OT hours • Calculation for how much those hours are costing the agency • Description of why the OT is occurring (so you know what other metrics to focus on)	• Comparison of old and new OT hours in a chart or bar chart • Description of what was done to reduce OT hours (will probably be presented in other metric areas)
"There are so many more important duties these people should be doing."	• Hours contributed to process • Redirected work hours	• "How many labor hours are dedicated to this process?" • "What is the average hourly wage of employees?"	• Raw statement of number of people involved	• Present redirected work hours: number of hours no longer needed that can be directed to mission-critical work • Comparison of previous work hours vs. new work hours, in chart or bar chart
"We could be saving our customers money."	• Direct customer savings	• "How much money are customers contributing to this process?" • "What is their biggest expense?"	• Raw statement of amount spent and biggest expenses (consider costs related to materials, equipment, inventory, space, contracted services, or waste)	• Comparison of old cost and new cost to the customer

Important Tips

- Data doesn't have to be scary. It's often enough simply to present raw numbers to demonstrate the process volume, processing time, or number of people involved in the process.

- Data doesn't have to tell an ugly story. Use data to compliment the group and point out what they are doing right. Use data to show it is not about the people, but the process. "I can see from your numbers that your volume keeps going up and your staffing levels keep going down, but you've been able to maintain good customer service. Congratulations and great job. I'm here to help you clear out a lot of the waste so this isn't so stressful for you."

- Pictures, graphics, charts, and graphs are very impactful. They show complex information in a simple form – use this to your advantage. Instead of having rows and rows of data, turn the numbers into visuals that make a point.

- Don't simply tell your team to "get data." Direct them to the data you need based on their objectives.

- You do not have to collect everything! Focus on the two or three main objectives, and focus your questioning and data collection on the criteria that really matter.

- Metrics are not an exact science. This metrics guide is simply that: a guideline. What you collect in the way of data, and how you present it, will differ from project to project.

- Celebrate your successes.

- Report your completed process-improvement projects at **lean.ohio.gov/scorecard**