Driving Rapid Benefits Realization: The Role for ISE and Op Analytics

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Purpose and Agenda

PURPOSE: To share Perspectives and Points of View and Case Examples of how ISE’s support Benefits Realization through Operational Analytics, Business Process Improvement, Business Case Development, and Disciplined Evaluation Studies

11:00  Scott to Tee Up the Session and Jim and Jared will weigh in, provide color commentary on Benefits Realization Management

11:55  Close out and Adjourn
1—Dialogue on the ‘Problem/Opportunity’ with Jared and Jim
   • Benefits Realization Management Process

2—Zoom in on Finance/Business Case 601 for the Process Improvement Use Case

3—More Dialogue on Best Practices related to ensuring Benefits are Realized in a Timely Fashion

4—Close-out
The Integration of
People
Strategy
Process
Technology
To rapidly drive benefits realization....
The End Game for Operational Excellence is to Systematically, Rapidly grow Enterprise Value

The focal question today is how do we keep improvement initiatives (teams) focused on the end-game and drive Benefits Realization?
ISE + Integrated LeanSigma + other Performance and Process Improvement Methods FOCUSED on the right ‘levers’ (Enterprise Value Map) WILL close ‘white space’, close performance gaps.

**Shareholder Value**

Practical paths to increase shareholder value
Op Excellence: BPM/I Frameworks
(Structured Framework Illustration)

CSE Controlled Service Environment - Implementation Roadmap

Program & Process Governance

- Initiation
  - Feasibility Study
  - Develop Business Case
  - Planning Resources
- Project Setup
  - Project Charter
  - Program & Project Planning
  - Detailed Project Planning
  - Define Workpackages
- Execution
  - Ongoing Project tracking
  - Ongoing Reporting
  - Ongoing Stakeholder involvement
  - Resource Coordination
- Transition & Closure
  - CSE Acceptance Testing
  - CSE Deployment & Rollout
  - Review Program goals & objectives
  - Initiate continuous improvement

Strategy

- Roadmap, Charter & Acceptance
- Stakeholder Analysis
- Planning (Resource Budget)
- Governance
  - Governance Structure
  - Governance Oversight
  - Governance Key Areas
  - Resources & Responsibilities
  - Management
    - Sense of urgency
    - Vision & Mission
    - Leadership
    - Sponsorship
    - Forming coalition
  - Assessment
    - Scoping
    - Governance & Processes
    - Culture & Skills
    - Technology
  - Strategy
    - Service Strategy
    - Security & Compliance
    - Sourcing Strategy – Cloud
    - Data & Infra-architecture
    - Technology direction

Design

- CSE Governance
  - SBM Policy
  - Documentation
  - Resource Management
  - Governance Key Areas
  - Resources & Responsibilities
  - Processes
    - Design Processes
    - Measurement System SPS
    - Reporting (RSE)
    - Workflow & Automation
    - Tool Requirements
  - Organization
    - Target Operation Model
    - Functional mandate
    - Workload Analysis
    - Developing Organization
    - Job Description

Transition

- Governance Transition
  - Assigning Rules & Regs
  - Organizational Transition
  - Functional Transition
  - Setup Service Portfolio
  - Setup Service Knowledge
  - Mgmt System SMKS
  - Process Transition
    - Service Catalogue
    - Process Testing & Validation
    - Measurement testing
  - Service Transition
    - Intake Services
    - Transfer Service into CSE
    - Establish Monitoring & Reporting

Operation

- Operational Acceptance & Sign-off
  - Service Delivery
  - Service measurement
  - Service reporting
  - Service improvement
  - CSE Operation
    - IM Directives & Controls
    - Quality Management
    - Governance boards
    - Managing Third parties
    - Business liaison
  - Service Operation
    - Service Delivery
    - Service measurement
    - Service reporting
    - Service improvement
  - Process Operation
    - Process direction & Control
    - Process monitoring
    - Process reporting
    - Process improvement

Tool Optimization

- Tool Strategy
  - Requirement Analysis
  - Platform & Integration
  - Interfaces
  - Data Analysis
- Tool Evaluation
  - Request for Information (RFI)
  - Request for Proposal (RFP)
  - Perform evaluation
  - Implement process & service requirements
- Tool Rollout
  - Data Migration
  - Release & Deployment Planning
  - Acceptance Testing
  - Rollout
- Tool Operation
  - User Administration
  - Workflow
  - Reporting
  - Housekeeping function

Continual Service & Process Improvement

- Ongoing training, awareness & communication
- continual improvement plan
- initiate CSE improvement
- initiate Service improvement
- initiate Process improvement

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THE POIREF GROUP
In most of our organizations we have lots of Improvement Activity
And as such a disciplined approach to Benefits Realization Management is a necessity.
An illustration of the context for our conversations today

We want to focus on how ISE’s help organizations Realize Benefits quicker, evaluate impact, build better business cases and evaluation studies, etc.

See our Strategy Workshop Webinar
Another IoT example of the process we will be discussing today
Another view—goal is to speed up benefits realization
One key component of Benefits Realization Management is Operational Analytics

Reduce the cycle times on each step in this explicit and systematic process

Executing the Analytics Triangle effectively enables more rapid decisions and actions and positions for more rapid benefits realization.
Another ‘view’ of the ‘Challenge’

Requirement:
Driving Results that are Verifiable, Realized, and Sustainable

Requirement: Capability to portray information, decision/action support

Requirement: Analytics Capability

Requirement: Data Management Capabilities

Results and Benefits Realization

Decisions-Actions

Insights Understanding

Most of reports and charts are here

Requirement:
Ability to make improvement adjustments rapidly and effectively

PML 1-2

PML 2-4

PML 1-2

PML 2-4

PML 3-4
Yet another that I liked....
Jared, Jim: I would characterize the focus of today’s webinar with this visual.

Path between improvement projects and strategic objectives

Capabilities
- A set of project deliverables enabling an organization to deliver a desired outcome. They can be a service, function or operation that enables the organization to exploit opportunities. Capabilities exist prior to transition.
  - Increase of market share
  - Shorter time to market
  - Higher employee retention

Benefits
- Measurable improvements providing a business advantage. Benefits can be both tangible or intangible, are often interconnected and stakeholder specific.
  - New project planning approach
  - Organizational set-up of a factory to reduce waste
  - An improved tool

Strategic Objectives

End Benefits

Intermediate Benefits

Outcomes
- A new operational state achieved after transition of capabilities into live operations. Normally affecting real world behavior or circumstances, they are the manifestations of the future state implemented.
  - Project plans comply to improved approach
  - Waste is handled according to new set-up
  - New tool is being used by the organization

Organizational Adoption & Alignment to Solution(s)

Your thoughts?
Pause for some Dialogue.....

So, to this point, we’ve tee’d up what I’d call Benefits Realization Management. Some have called it Implementation Sciences. (see University Health Network, Toronto)

What are your thoughts about the need for organizations to make this a more explicit competency AND for the role ISE’s can play in this domain?

Jim

Jared
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BPI Service Levels

TACTICAL
Content Focused
Known Opportunities
Proof of Concept
ROI Justification

VALUE OPTIMIZATION
Business Case Focused
Value Chain Prioritization
Program Expansion
Benefit Realization

STRATEGIC
Innovation Focus
Enterprise Value Optimization
Program Integration

BROADTH OF BPI CHANGE

REDEFINE THE INDUSTRY
OPTIMIZE VALUE CHAINS
LEVERAGE BEST PRACTICES

PROCESS IMPROVEMENT "Value Expansion"
PROCESS DEFINITION "Value Capture"

BUSINESS PROCESS REDESIGN
EXTENDED VALUE CHAINS

FUNCTION SPECIFIC PROJECTS
CORE BUSINESS PROCESSES
PRIMARY VALUE CHAINS
ISE + Integrated LeanSigma + other Performance and Process Improvement Methods FOCUSED on the right ‘levers’ (Enterprise Value Map) WILL close ‘white space’, close performance gaps.
# Evolution of the Business Case

## Digital Six Sigma DMAIC Improvement Process

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<thead>
<tr>
<th>Level 1</th>
<th>Enterprise Value Map View</th>
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<td>1.0 Define Opportunities</td>
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<td>2.0 Measure Performance</td>
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<td>3.0 Analyze Opportunity</td>
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<td>4.0 Improve Performance</td>
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<td>5.0 Control Performance</td>
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### Objective
- Validate or refine the business opportunity and charter, illustrate their business processes, define customer requirements, and prepare themselves to be an effective project team.

### Main Activities
- Validate/develop Team Charter
- Map process
- Identify Quick Wins/Non Value Added
- Translate VOC/VOB to CTQs/CTPs
- Build the team

### Potential Tools and Techniques
- Identify input, process, and output indicators
- Develop Measurement Plan & operational definitions
- Measurement Systems Analysis
- Evaluate baseline performance
- Process Control & Capability

### Key Deliverables
- Team Charter
- Project Plan
- Process maps
- Quick Win Opportunities
- CCRs - CTQs CTPs

## Level 2

### Direct, Indirect, Other Analysis

### Level 3

### Solution Element Level ROI

### Integrated Levels 1-3 Final

### Sign-off on Bus Case by Finance and Exec Sponsor
3 levels of Business Cases

I—Enterprise Value High Level Benefit Mapping

https://www.tribalmind.co/S3/tribalmind-live/Discoveries/GMhYVFVg0aftdAuiZdoYw.pdf

II—Direct, Indirect, Other Benefits Characterization

- Bottom line, P&L impact this FY
- Impact on Balance Sheet
- Enabler benefits, less tangible benefits, distanced from tangible $ outcomes but instrumental, capability building, etc.

III—project level ROI

- Cash flow diagrams
- 3-year NPV
- Benefit to Burden Ratios
- Etc.
Identify Projects (cont)

Relative Financial Performance (X-Year)

- B = X-Year Financial Performance Relative to Peer Group
  (A = Leading, B = Above Average, C = Average, D = Below Avg.)
  ↑↓ = Improving / Deteriorating Lately

Strategic Priority
- Yellow = Program/project A
- Key Business Issue
- Program or Project
  - Red = Program/project B
  - Blue = Program/project C
  - Orange = Program/project D
Creating Enterprise Value via Bus Process Improvement

**Project Financial Benefits**

- **Revenue**
  - Volume
  - Price Realization

- **Operating Margin**
  - Selling
  - General & Admin
  - COGS

- **Working Capital**
  - Inventory
  - Receivables & Payables

- **Asset Efficiency**
  - Real Estate & Infrastructure
  - Equipment & Systems
  - Company Strength

**Value Drivers**

- Generating revenue by enabling expansion of customer base, development of new revenue streams, retention and growth of existing customers.
- Leveraging income generating assets
- Price Optimization

**Revenue Drivers**

- Reducing costs associated with Operating Expenses, including Customer Interaction, Corporate / Shared Services, Product Development, Material and Production, Logistics, Distribution and Service Delivery
- Reducing costs associated with items impacting cash flow, including Raw Material, WIP, Finished Good, Accounts, Notes and Interest.
- Reducing costs associated with fixed costs and depreciation
- Improved reporting capabilities, tax efficient structures, Planning processes, improved Analysis.
Business Cases—Level 1 (Enterprise Value) nice example from a capstone certification Project
Benefits can be classified according the following categories:

<table>
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<th>Category</th>
<th>Description</th>
<th>Examples</th>
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<tr>
<td>DIRECT</td>
<td>Directly impacts the Income Statement or Balance Sheet. The benefit is proven to be attributed to, caused and realized through the action and recommendations of the project.</td>
<td>• Cost Reduction&lt;br&gt;• Improved margin&lt;br&gt;• Revenue growth</td>
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<tr>
<td>INDIRECT</td>
<td>Intangible in nature and do not meet any of the set criteria for attribution, causality or realization. Require a subsequent action on the part of management to be realized OR, cost avoidance benefits that have not yet been proven to be in the current budget or forecast.</td>
<td>• Cost Avoidance&lt;br&gt;• Cash Flow Improvement&lt;br&gt;• Cycle time reduction&lt;br&gt;• Unutilized Capacity Improvement (manpower/equipment/space)</td>
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Simple illustrations of types of ‘benefits’

- **Financial**
  - Tangible: An 18% increase in revenue
  - Intangible: Improved sales prospects

- **Non-financial**
  - Tangible: A 50% reduction in response time
  - Intangible: Improved customer satisfaction
Business Case Level 2

- Direct Benefits (impact to the Profit and Loss Statement this FY)
  - Projected 3-year Net Present Value
  - Perhaps a Cash Flow Diagram
  - Waterfall Chart(s)
  - Etc.
**Note**: Capture and validate any “actual” benefits and costs prior to realization.

If benefits change >-20%, revalidate the project with VSO & Finance Rep.

- **Recognize/Define**
  - Size of Prize (Hard/Direct and Other)
  - High Level and Initial Forecast

- **Measure/Analyze**
  - New Process Capability Impact Assessment Improved

- **Improve & Control Plan**
  - Initial Validation

- **Implementat’n & Control**
  - New Process Capability Stabilized

- **Realize**
  - (12 month Audit & Transition)
    - M1
    - M2
    - M3
    - M4
    - M5
    - M6
    - M7
    - M8
    - M9
    - M10
    - M11
    - M12

**Benefits**
- **Accuracy**: +/- 30%
- **Costs**: +/- 15%
- **Realize**: +/- 10% certainty

**Finance Rep**
- Processes completed project after 12 months & accounts for benefits in future budgets

**Measure/Analyze**
- Enhancements to H/M/L Estimate of Ease and Cost Capturing the ‘Prize’

**Improve & Control Plan**
- Costing of Solution Elements required to capture the ‘prize’ complete and accurate

**Recognize/Define**
- High Level Indication that B/C ratio is significantly > 1

- **Accuracy**
  - +/- 5-10% certainty

**Costs**
- H/M/L Estimate of Ease and Cost of Capturing the ‘Prize’

**Accuracy**
- 80% confidence level Indication that B/C ratio is significantly > 1

If actuals are +/– 10% from projection, notify VSO, belt and Finance Rep to reassess.
In cooperation with the Value Stream Owner, Black Belt, Green Belt, the Finance Representative identifies the financial measurement of the defect that is being eliminated or reduced.

The Belt decides the method to be used to determine that the defect has been eliminated or reduced, and the method must be documented.

During Implementation & Control Phase, The Finance Representative and the Belt determine the method to be used to monitor and verify the tracking of the benefit during the Realization Phase of the project.

After 3 months of Realization and verification that the benefit has been actualized, is predictable (i.e. stable) and is measurable, the Process Owner will assume ownership of monitoring of the process and financial benefit for the remaining period of Realization.

Should the actual financial benefit vary by more than 10%, the Process Owner should notify the VSO, Finance Rep and Belt to determine if an adjustment to projections is required.
**Project Reporting**

1. **Investment Recovery (Pay Back) Period in Years**
   - How long it will take us to recover the full value of the project investment (i.e. project costs or one time costs)

2. **3 Year NPV (DIRECT at discount rate @ 11%)**
   - Value of 36 months (three years) of net direct benefits in today’s dollars (future values discounted to reflect time value of money)

3. **3 Year NPV (DIRECT + INDIRECT at discount rate @ 11%)**
   - Value of 36 months (three years) of net total benefits in today’s dollars (future values discounted to reflect time value of money)

4. **Steady State Annualized Benefit (DIRECT)**
   - Months 25 to 36 of direct benefits, representing the annual value of the project once it hits steady state

5. **Steady State Annualized Benefit (DIRECT + INDIRECT)**
   - Months 25 to 36 of total benefits, representing the annual value of the project once it hits steady state

**Fiscal Reporting**

1. **Fiscal Year Impact of Project**
   - Snapshot of 12 months of project direct benefits over any fiscal year. Accounts for any project in realization that has not yet reached 100% of annualized steady state direct benefit.
The fiscal year portfolio of benefits

Portion of the project direct benefits in any fiscal year

Projects entering Realization

Upon realization of 100% of steady state annual benefit

As we do more projects (more belts, more projects per belt, in Realization), the bathtub expands
Financial benefits of the program will be the sum of all benefits realized within the fiscal year.
Financial Realization: RDMAICR perspective

The Net Present Value of the Project is calculated on the 36 month benefit/cost flow

$ Benefits to Unit only get ‘counted’ for until benefit gets “baked into” financials (i.e. 100% of steady state direct benefit is realized)

Train-Do Implement Realization

CONTROL Phase

### Project Finances in EnterpriseTrack

#### BLUE = DMAIC cycle

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Pause for some quick dialogue on ‘mechanics’ of Business Case Evolution on Projects

Jim/Jared: in your experience what are some of the things that work and also that need work as Process Improvement Specialists manage the Benefits Realization aspect of their Projects…
Customer and Member Satisfaction and Feedback Survey

Benefits Realization Management: The Role for ISE’s

You can download the deck (handouts). You will receive an e-mail tomorrow with certificate and link to recording. You can go to this IISE link soon and get deck and recording. https://www.iise.org/details.aspx?id=46729
Thank You!

Enjoy the IISE Annual Conference and the rest of our Performance Excellence Track Sessions

Contact us for More Info:

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Where to find our digital library of past Webinars

Over 50 recorded Webinars on a wide spectrum of Performance Excellence Topics are available to members of IISE by clicking on this link.

Our IISE TV Channel is allowing you to customize what you have personalized access to.

Quarter 3&4 Webinar Program/Lineup is shaping up well based on voice of member input

**August 24:** *Social Service Systems Engineering: Bringing ISE to this Sector*
Register with this link
[https://attendee.gotowebinar.com/register/5697276045520520204](https://attendee.gotowebinar.com/register/5697276045520520204)

**Sept 7:** *Operational Analytics Certification Program Launch—Overview for ISE Students and Practitioners*

**Sept 21:** *Creating Cultures to Support and Drive Operational Excellence*
Op Analytics Development Options

1. **On campus or Hybrid MS Programs**
   - Time: 1-2 yrs
   - Cost: $50-100k

2. **On-line, Virtual**
   - Time: 4 days to 6 mos
   - Cost: $600-$5,000

3. **Hybrid/Blended Model**
   - Time: 120 hours +
   - Cost: $450 students + $250 for certification
   - $675/875 member/non-member + $550 for the certification

Op Analytics represents huge opportunity for ISE’s

In Partnership with:
The Poirier Group

Delivered Uniquely:
IIESE Digital Op Ex ‘Mall and Stores’
- Video Recordings for easy, self-paced consumption/learning in ~:60 chunks
- ‘Chat’ Support with Coaches
- Periodic Huddles for virtual coaching
- Certificate requires an on-line final exam
- Certification requires the Certificate plus a reduction to practice, proof of skill project

Module 1: OA Thought Leader Perspectives
Module 2: Operational Analytics Perspectives, Points of View and Foundational Principles and Methods and Models
Module 3: Operational Analytics: The Foundational Data Management Role
Module 4: Operational Analytics: The Analyst, Decision/Action Support Role
Module 5: Data Sciences and The New Industrial and Systems Engineering
Module 6: Operational Analytics: Value Stream and Process Improvement Analytics
Module 7: Operational Analytics—Visual Measurement/Management Systems
Module 8: Operational Analytics: Putting it All Together: Management Systems Engineering Role
Module 9: Operational Analytics: Case Studies
Module 10: Final Exam and Certification Requirements Definition Document
Module 11: Bonus Module—ISE’s Engineering Value in Times of Disruption