

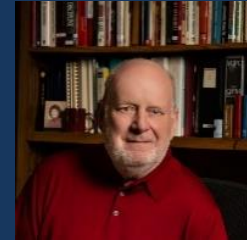
Implementation Science and Benefits Realization Management: The New Industrial and Systems Engineering Series

Special Thanks to our Sponsors:

Council of Industrial and Systems Engineers

The Poirier Group

Presented by:



D. Scott Sink, Ph.D., P.E.
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Adjunct Prof, Va Tech
Global Perf Excellence
Webinars
Team Lead, IISE



INSTITUTE OF
**INDUSTRIAL
& SYSTEMS**
ENGINEERS

23 Sept 2021

Purpose and Agenda

PURPOSE:

To update *Implementation Strategies for Industrial Engineers* with an overview of *Implementation Sciences and Benefits Realization Management*.

11:30 Kick-off the Webinar

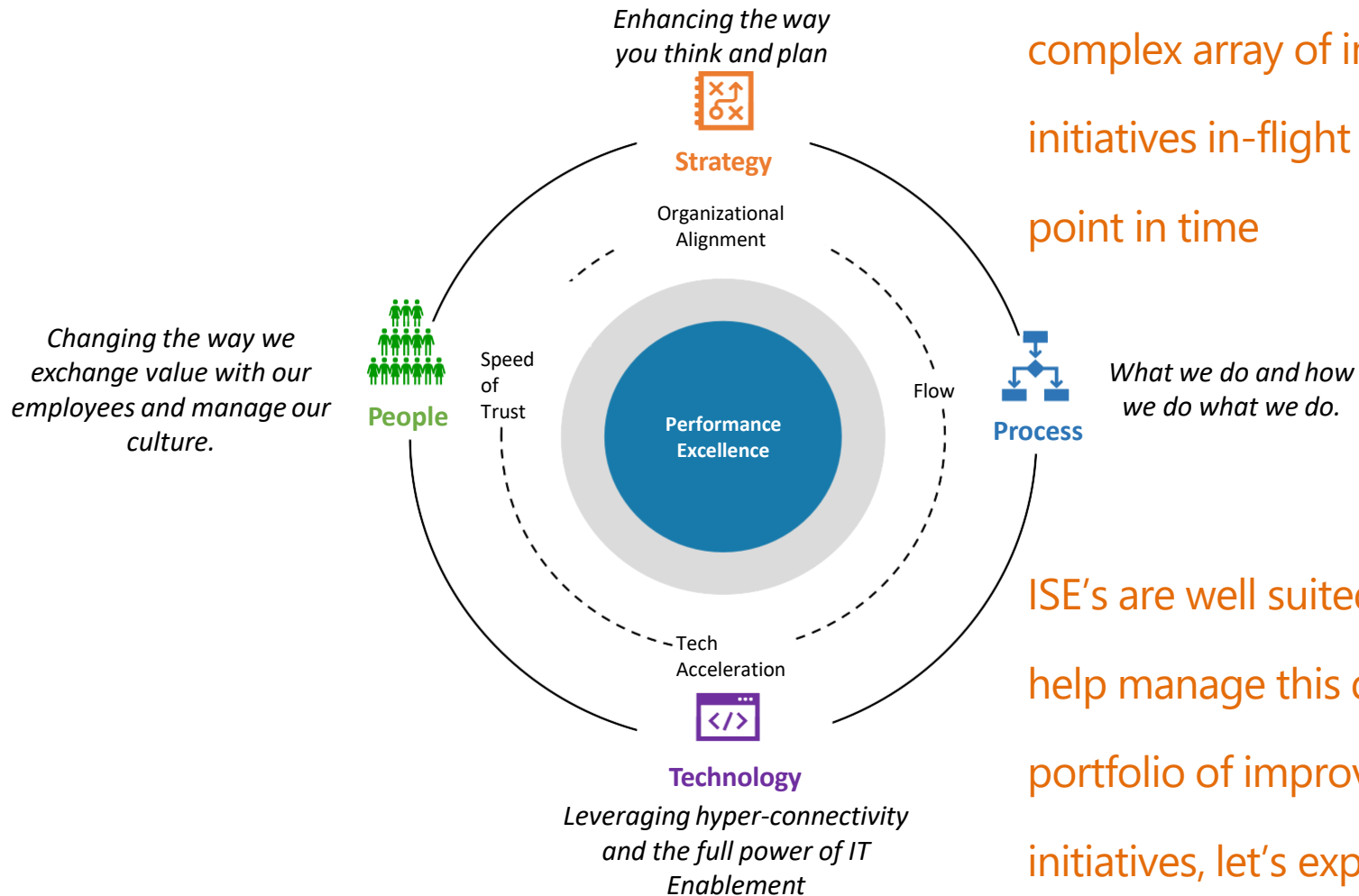
Overview of the work of Morris and Sink on Implementation Strategies for ISE's

Update on the current state of Implementation Sciences and Benefits Realization Management

Will weave in Q&A from audience during the session

12:25 Close out and Adjourn

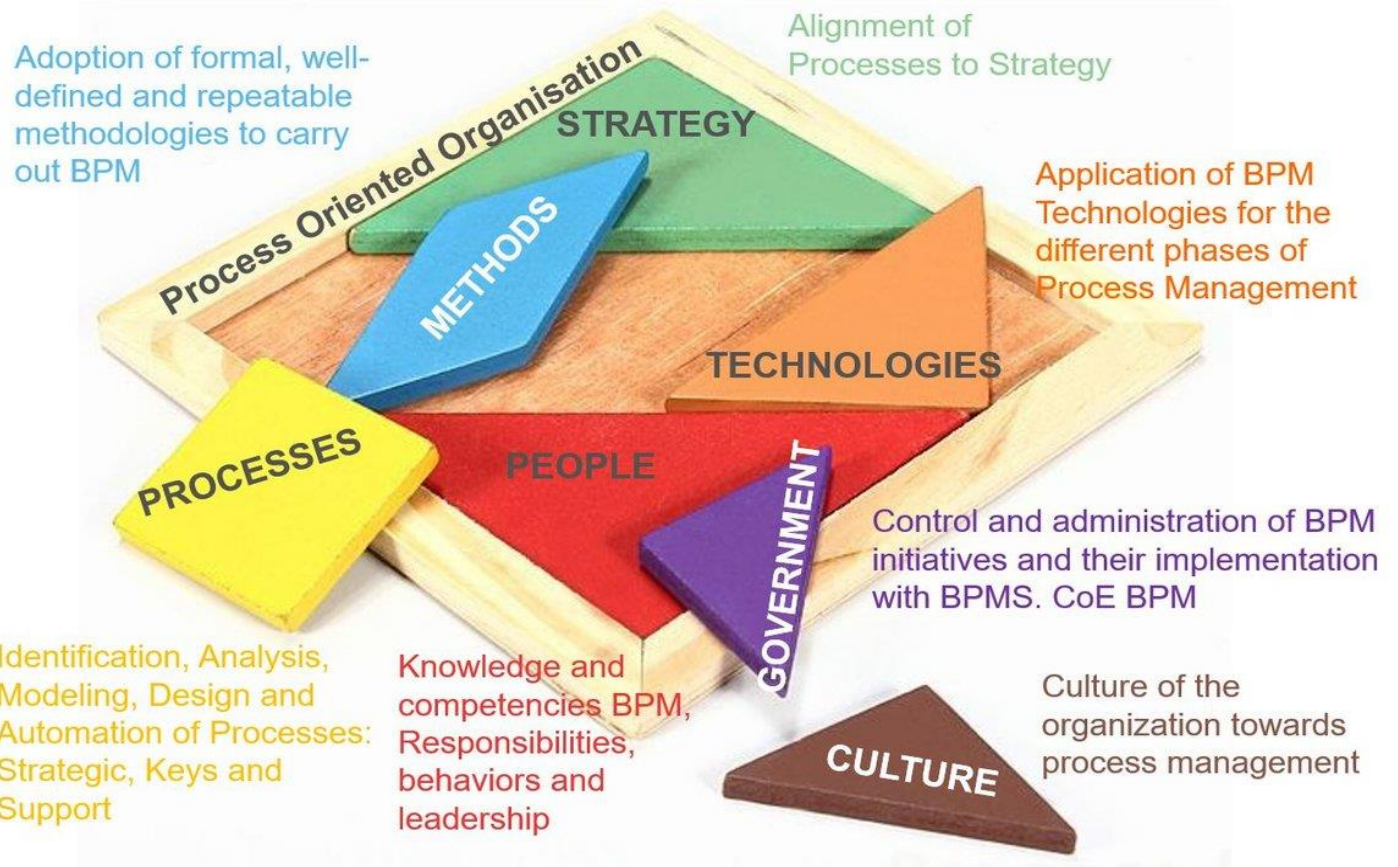
ISE's Create Value by Integrating People, Strategy, Process and Technology



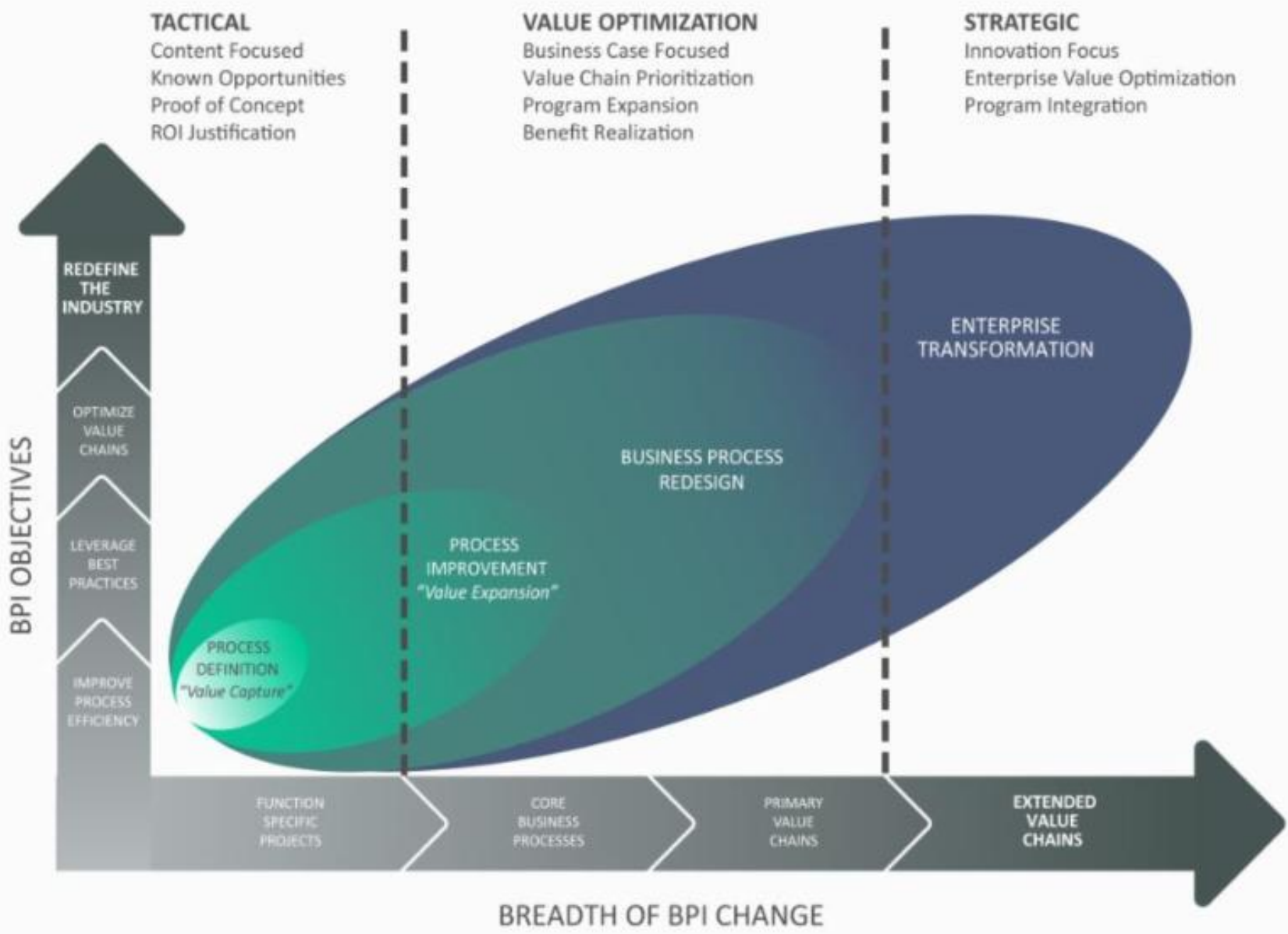
Most Organizations have a very complex array of improvement initiatives in-flight at any given point in time

ISE's are well suited (trained) to help manage this dynamic portfolio of improvement initiatives, let's explore how we can contribute to this...

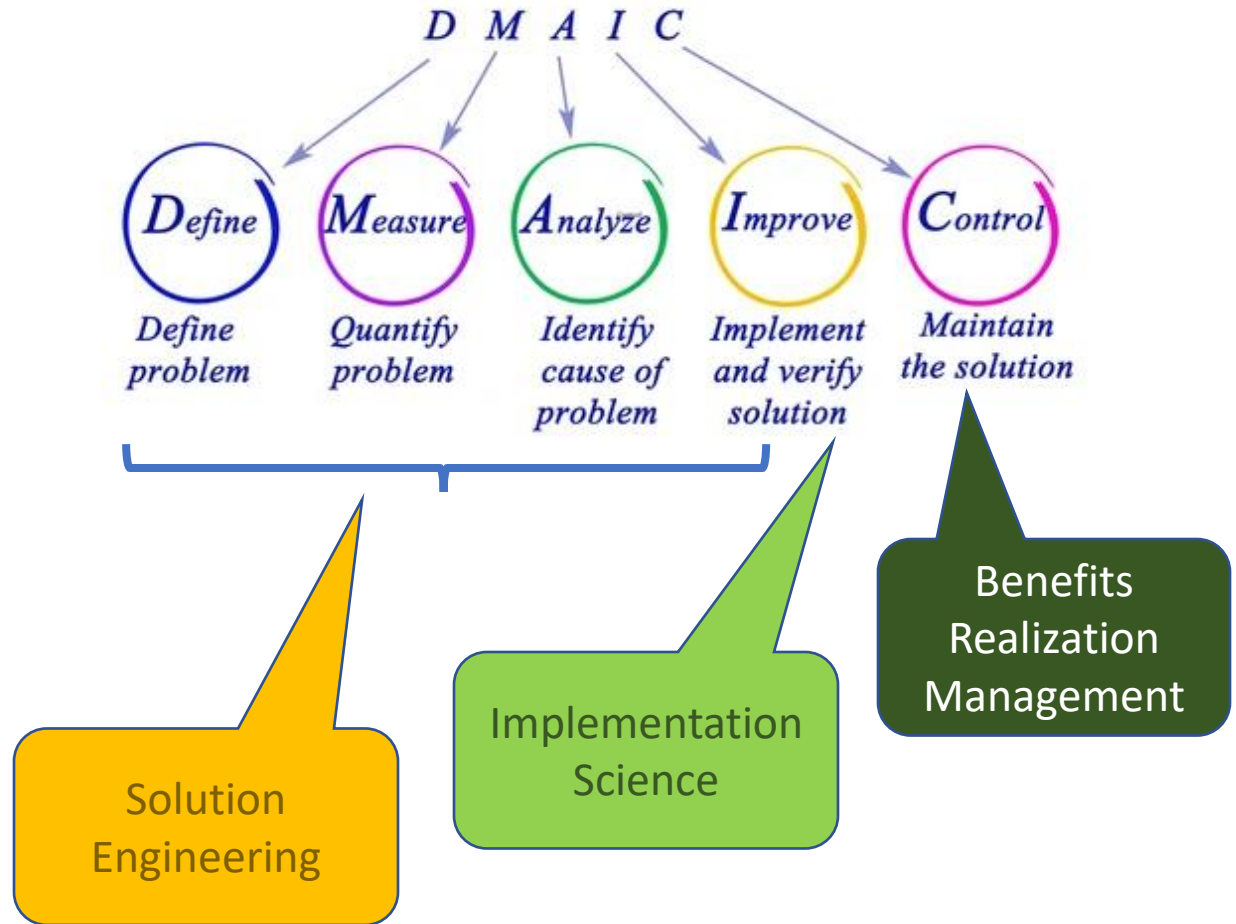
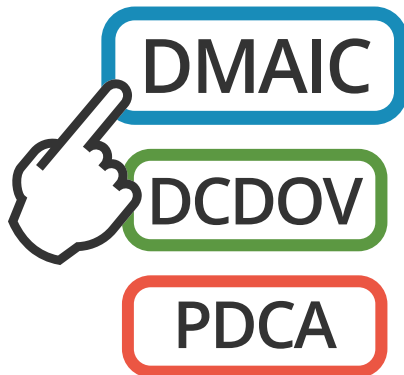
The Integration of
People
Strategy
Process
Technology
To rapidly drive
benefits
realization....



The New Industrial and Systems Engineering spans the full spectrum of Business Process Management Endeavors

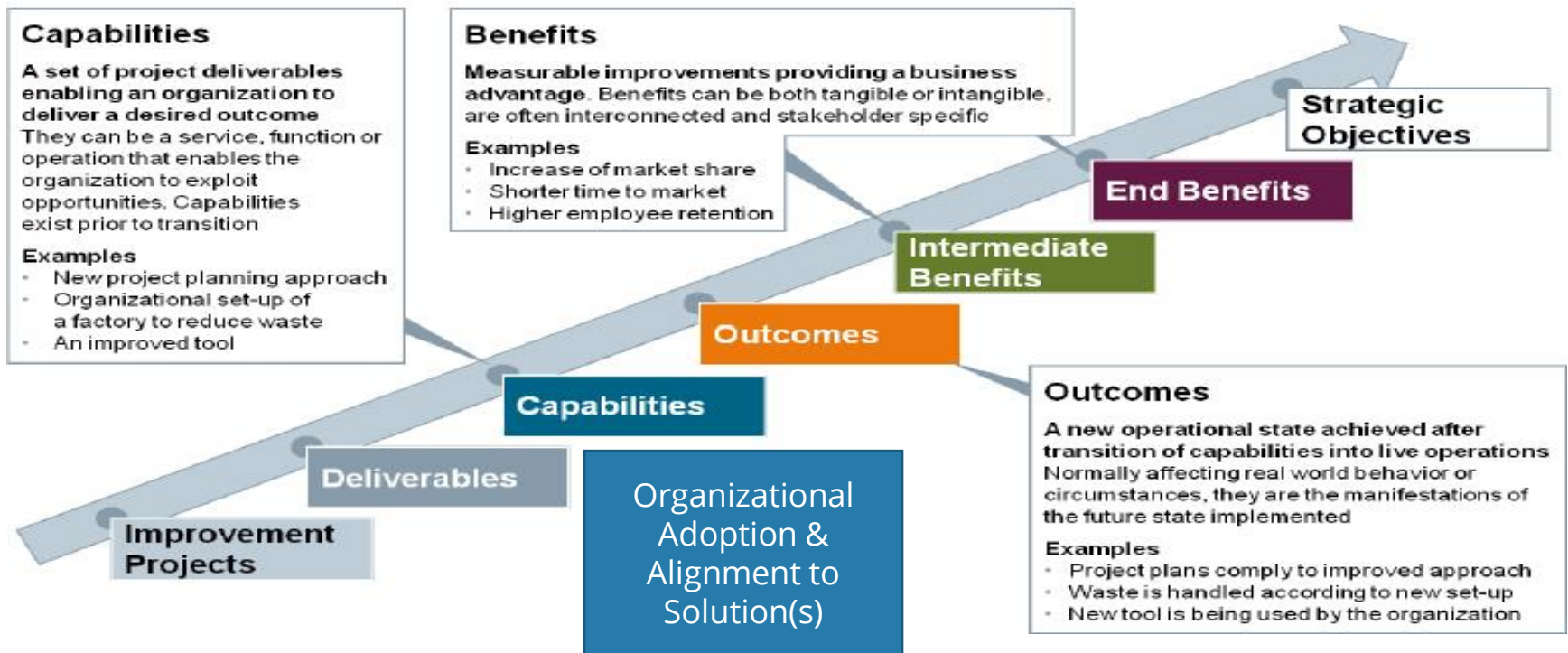


Commonly BPI improvement manifests itself in Reengineering or New Design (DCDOV) or Fix the Process (DMAIC) or Continuous Improvement (PDS/CA)



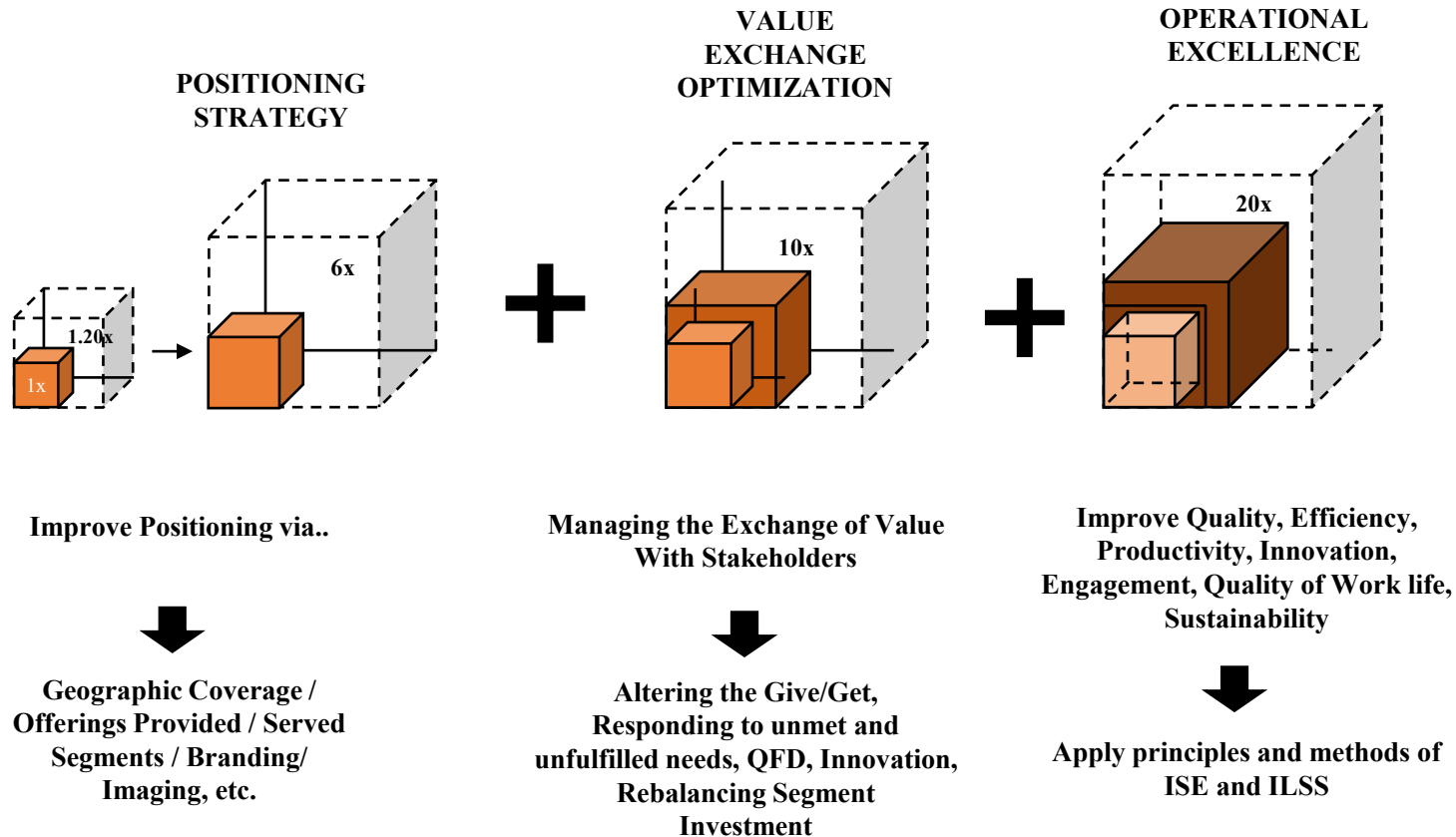
Regardless of the form of process improvement, 'starting with the end game' in mind is critical.

Path between improvement projects and strategic objectives



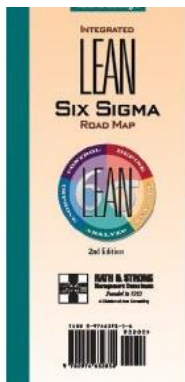
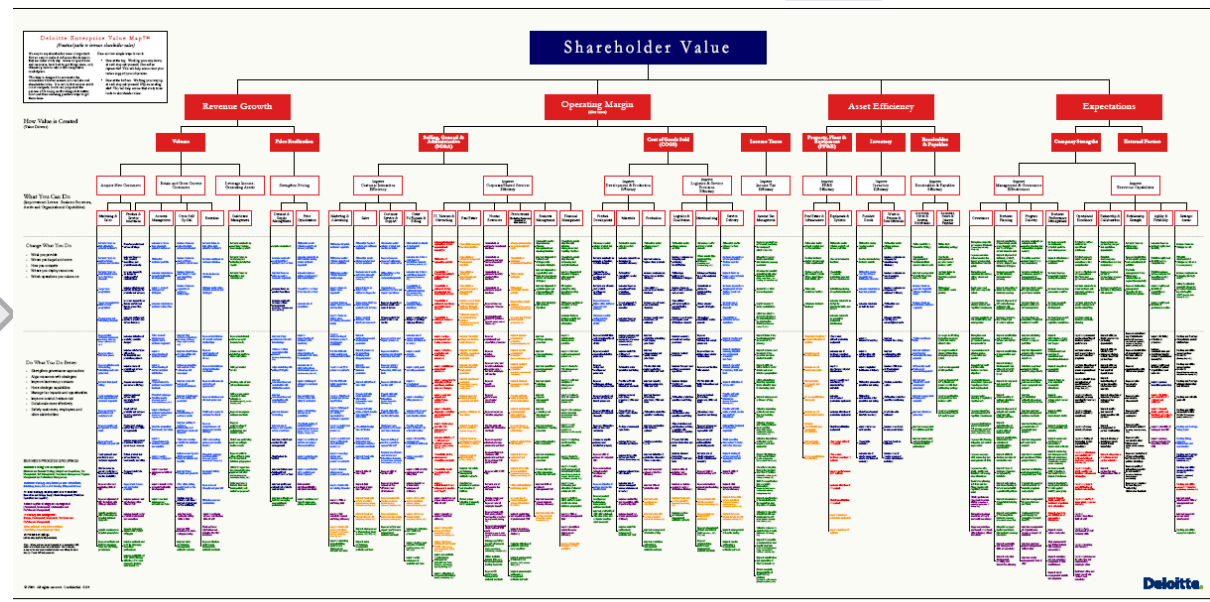
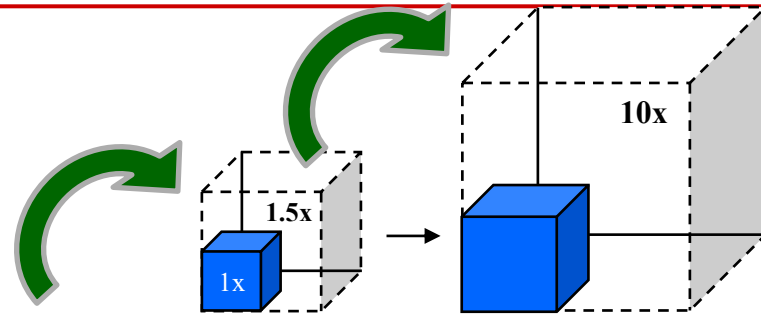
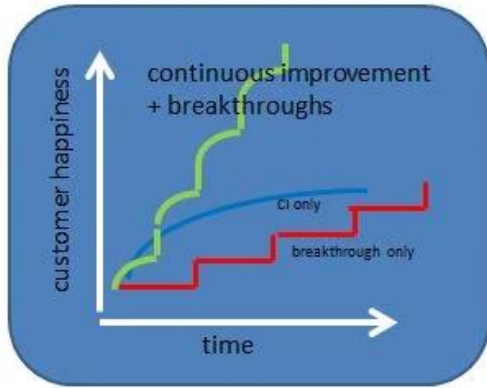
What is the End Game?

The End Game for Operational Excellence is to Systematically, Rapidly grow Enterprise Value



The focal question today is how do we execute all the improvement initiatives (teams) in a timely, organized, systematic fashion and in a way that is focused on the end-game and drive more rapid Benefits Realization?

A busy slide but the story line is simple..ISE + ILSS + Systematic Improvement Portfolios Yields Growth in the Cube

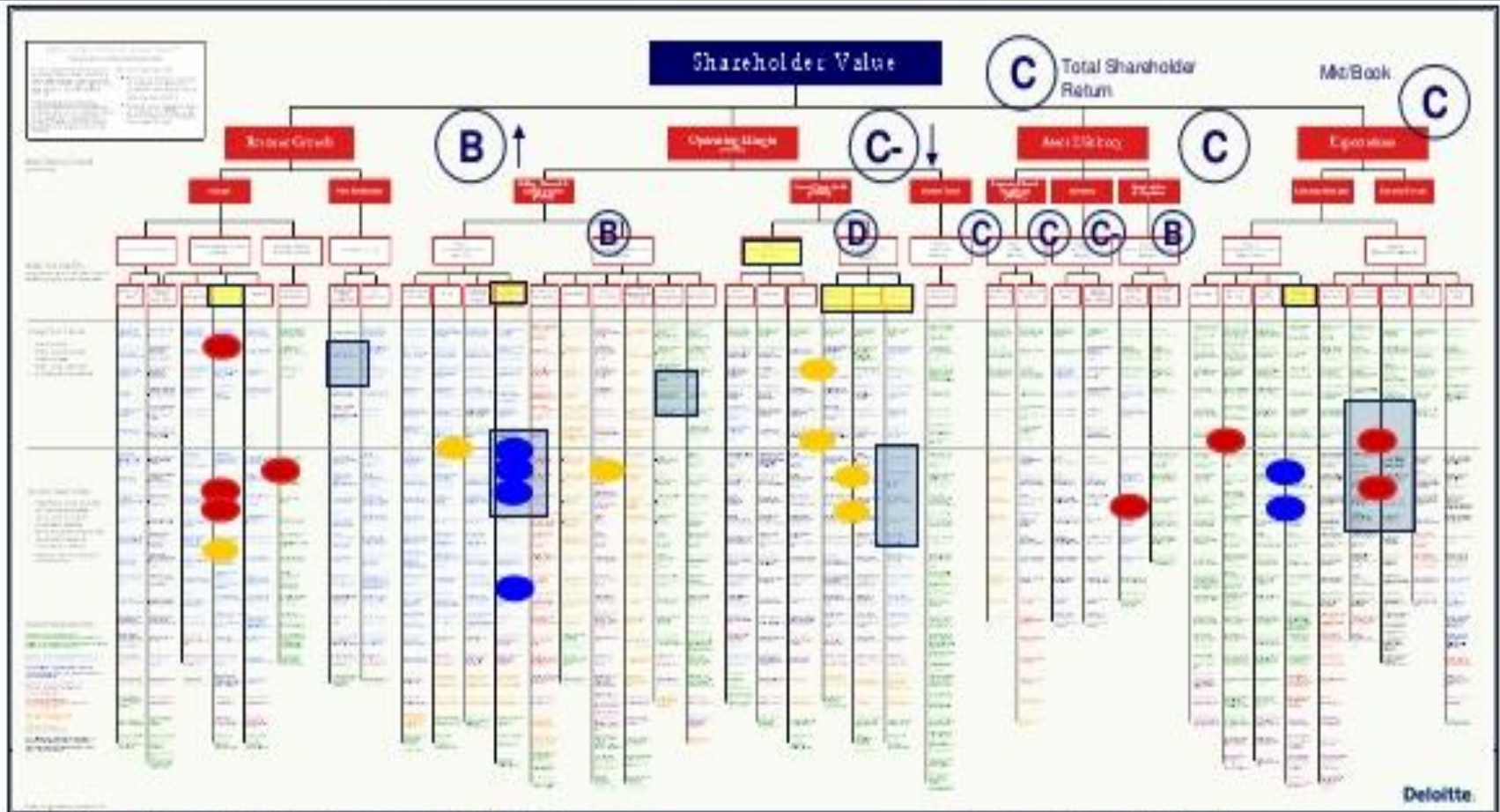


ISE
Integrated Systems Engineering



Enterprise Value Map
Practical paths to increase shareholder value

The Ent Value Map can be used to strategize, plan, manage the portfolio of improvement initiatives and projects over time

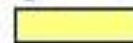


Relative Financial Performance (X-Year)

B = X-Year Financial Performance Relative to Peer Group
 (A = Leading, B = Above Average, C = Average, D = Below Avg.)

↑↓ = Improving / Deteriorating Lately

Strategic Priority



Key Business Issue



Program or Project

● = Program/project A

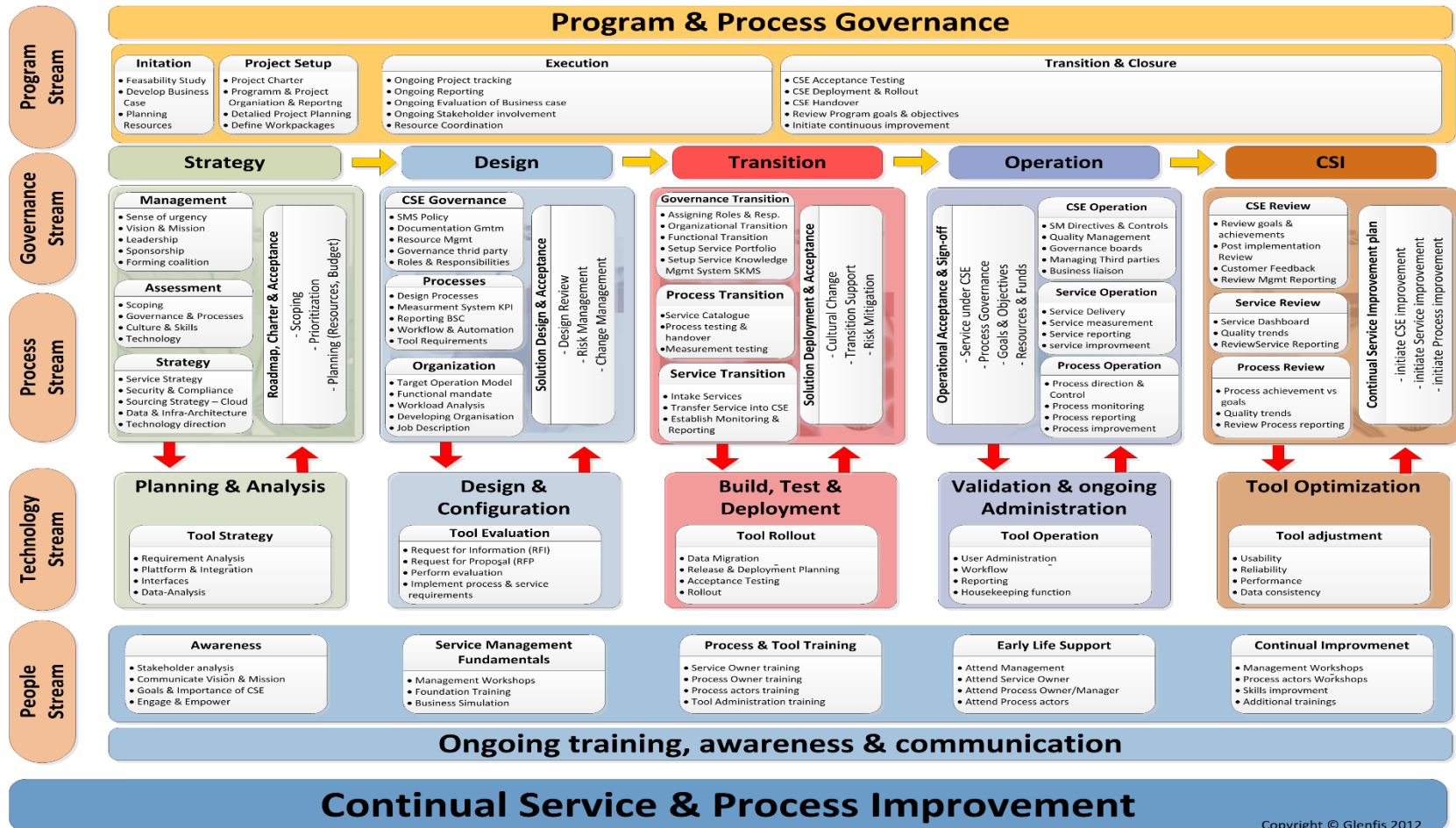
● = Program/project B

● = Program/project C

● = Program/project D

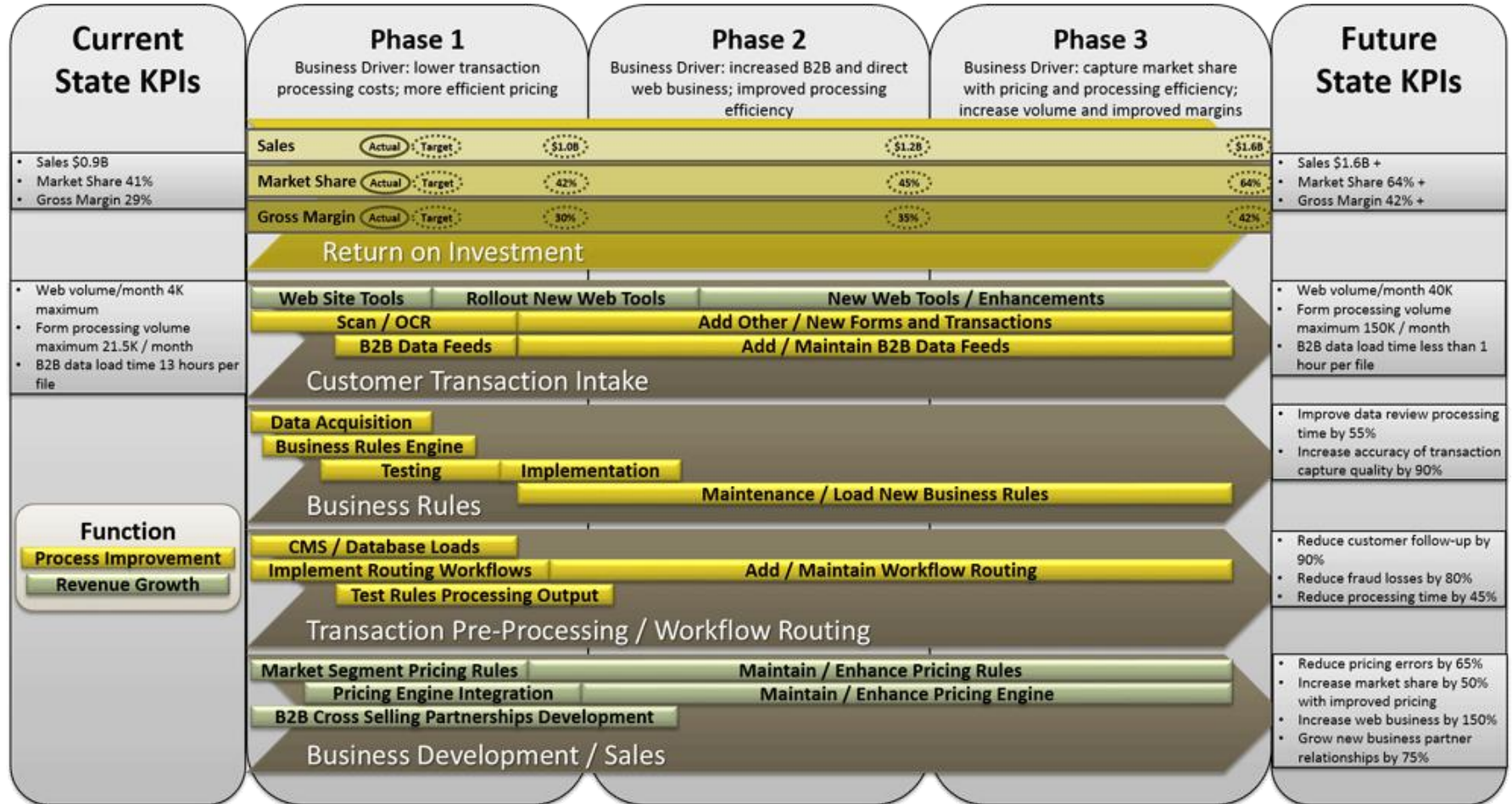
All Op Ex type programs are going to be a complex and dynamic mix of 'system components' that are being built out in an integrated, synchronized fashion.

CSE Controlled Service Environment - Implementation Roadmap



Copyright © Glenfis 2012

Hence, in even Small/Medium sized organizations there will be many improvement projects in-flight at any given point in time.



Which brings us to the Three Ball Challenges



- As ISE's, when we get a program or project, an opportunity to capture, we have three ball's we have to juggle:
 1. Solve the Focal Problem, Get to DONE, Achieve the objectives and outcomes of the project (Quality of the Solution)
 2. Program and Project Management (Resource Management over time)
 3. Change Leadership and Management (Acceptance of the Solution—Implementation, Deployment, Sustainability)

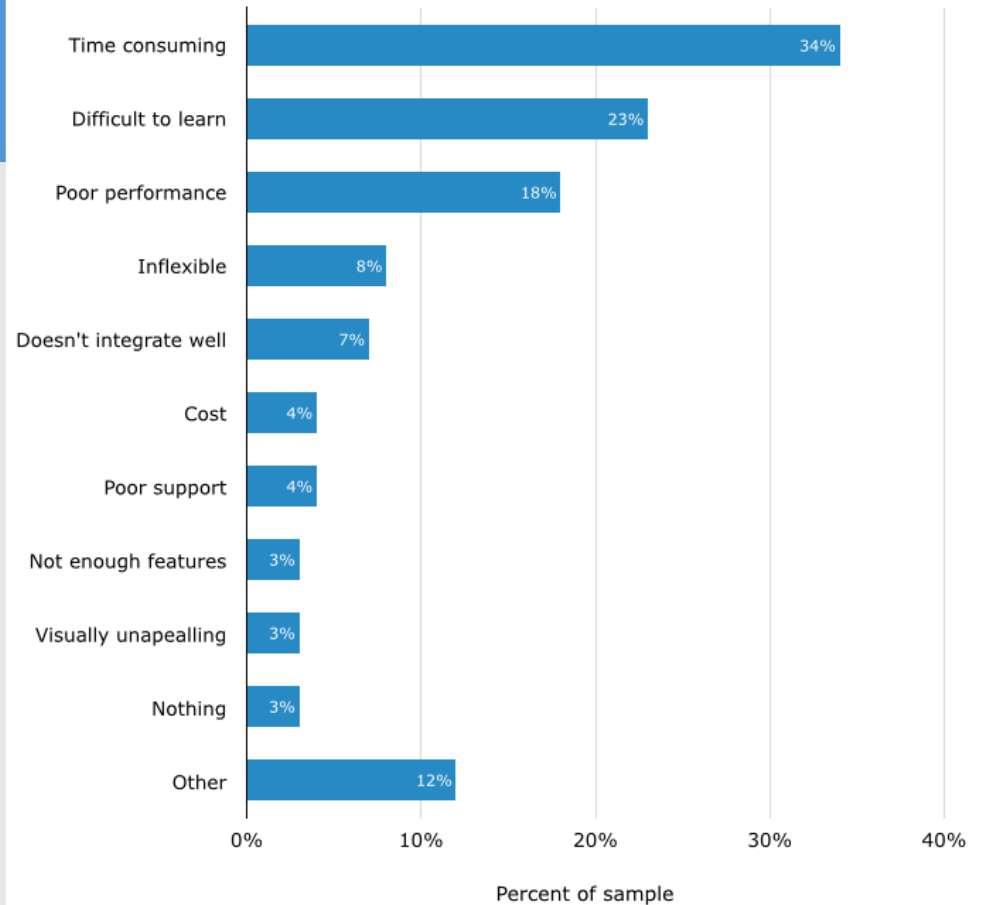
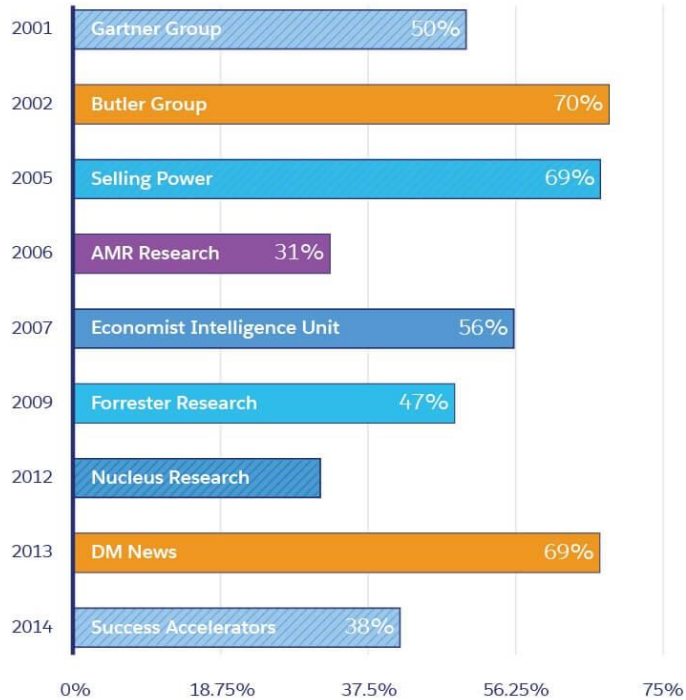
- As mentioned, in most organizations, you've got the 3-ball challenge to the nth power essentially. Even with big projects they are often really Programs and so the 3-ball challenges are great.

- We can decompose this complexity at the project level and then scale up and that helps.



CRM as an example

CRM Failure Rates



IT Enablement related projects...

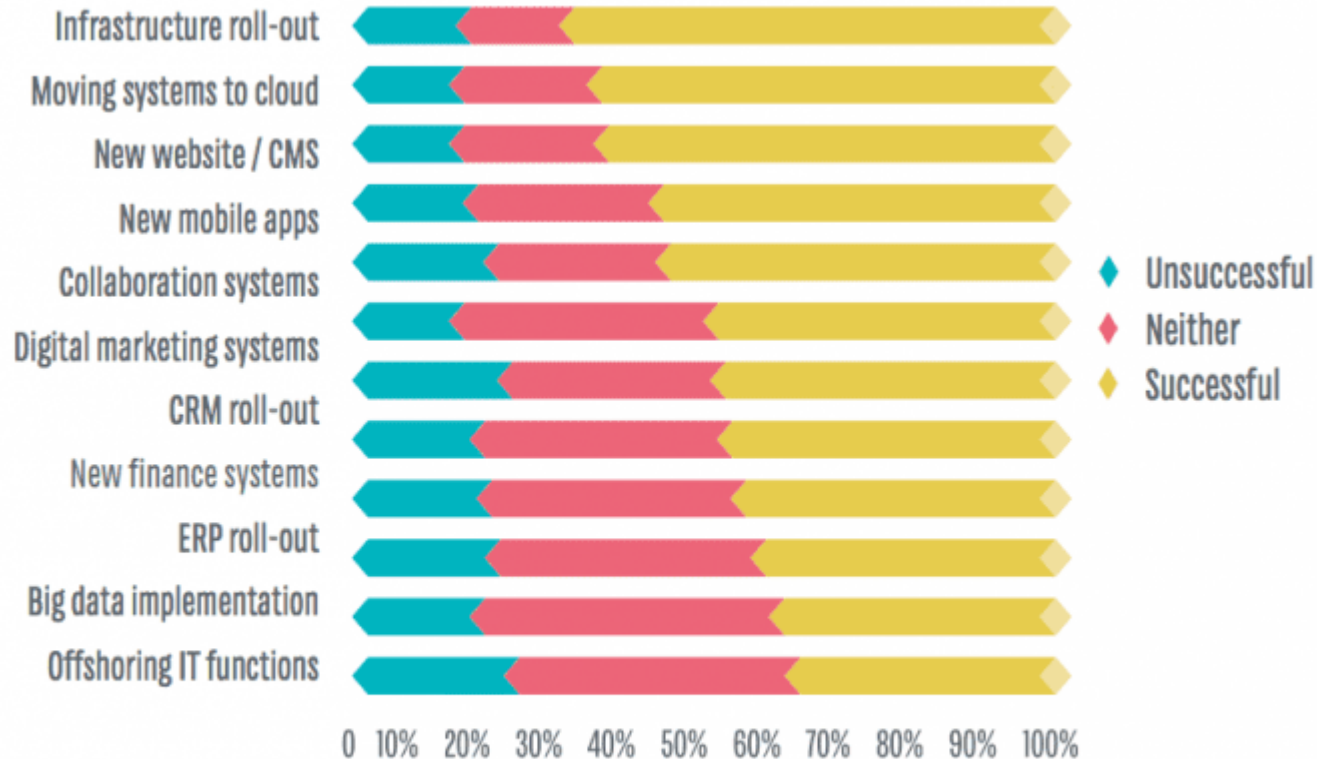


Chart 7: For those projects completed during the last TWO YEARS, indicate how successful you feel the project was.

<https://www.thirdstage-consulting.com/why-do-erp-implementations-really-fail/>

You can 'google' and get to countless lists like this one..

Why Do Most Projects Fail?



What are your reactions to the 3-ball challenge?
What are your biggest implementation challenges?

- use the question function to add an answer...

My top 10 list is ...

1. **Stakeholder Identification and Management** Plan not created early out.
2. **Roles and Responsibilities and Accountabilities not nailed down**, ambiguity and conflict is allowed to grow over time.
3. As a result, **DONE is not clearly, correctly defined** and therefore any strategy to DONE work will be off base because DONE is often not focused, clear and aligned.
4. The project proceeds with the project managers concept of DONE which is often off base or plain wrong.
5. An **Integrated Master Schedule (IMS)**, e.g. project level 3/4 Microsoft Project Plan is created, **prematurely**, action junkies creating task and action plans and rapidly lose sight of the forest for the trees.
6. The **Integrated Master Plan (IMP)** is **never completed** hence no way to zoom out, up and get correction to take place, so death spiral proceeds unchecked and unmanaged.
7. **OKR methodology not known** and hence not applied. (Measure what Matters, Objectives and associated Key Results)
8. **Progress and performance**, weekly, **not managed in a disciplined fashion**. SPRINT logic and methods not applied. IMP's by week not done. Progress and Performance updates are BS and the organization gets into if you buy my BS I'll buy yours patterns of behavior.
9. Deliverables are created but the **causal path from project deliverables to intended, required, needed benefits realization** is never clearly explicit and evaluated.
10. And in the end, a significant percent of improvement projects outright fail and an even larger percent fail to achieve the required and promised business outcomes.

How can Implementation Science and Benefits Realization Management Address these common 'Failure Modes'?



Kotter's 8-Step Change Model

DEFINITION	1	HIGHLIGHT THE URGENCY	Why Change is so Necessary.
	2	BUILD THE TEAM	The People who will Implement the Change.
	3	DEFINE THE NEW VISION	How things should and will be.
IMPLEMENTATION	4	SHARE THE VISION	Tell People How things will be and Why.
	5	ENCOURAGE TO ACT	Give good Reasons to Change.
SECURE	6	CREATE QUICK WINS	Establish achievable Goals.
	7	TRACK THE PROGRESS	Measure and Evaluate the Change.
	8	STRENGTHEN THE CHANGE	Make change part of the Culture.

65% of organizations have an agreed upon strategy (or a process by which to do that)

14% of employees understand their organizations strategy

**<10% of organizations successfully execute their 'big' strategies
70% of process improvement initiatives fail**

5 Key Words that can make a difference for you

Communication

Creating a shared understanding and the necessary **conditions for alignment**

Alignment

Driving the synergy required to rapidly translate **strategy into reality**

Visibility

Creating a clear link between plans, actions and **results that drives accountability**

Accountability

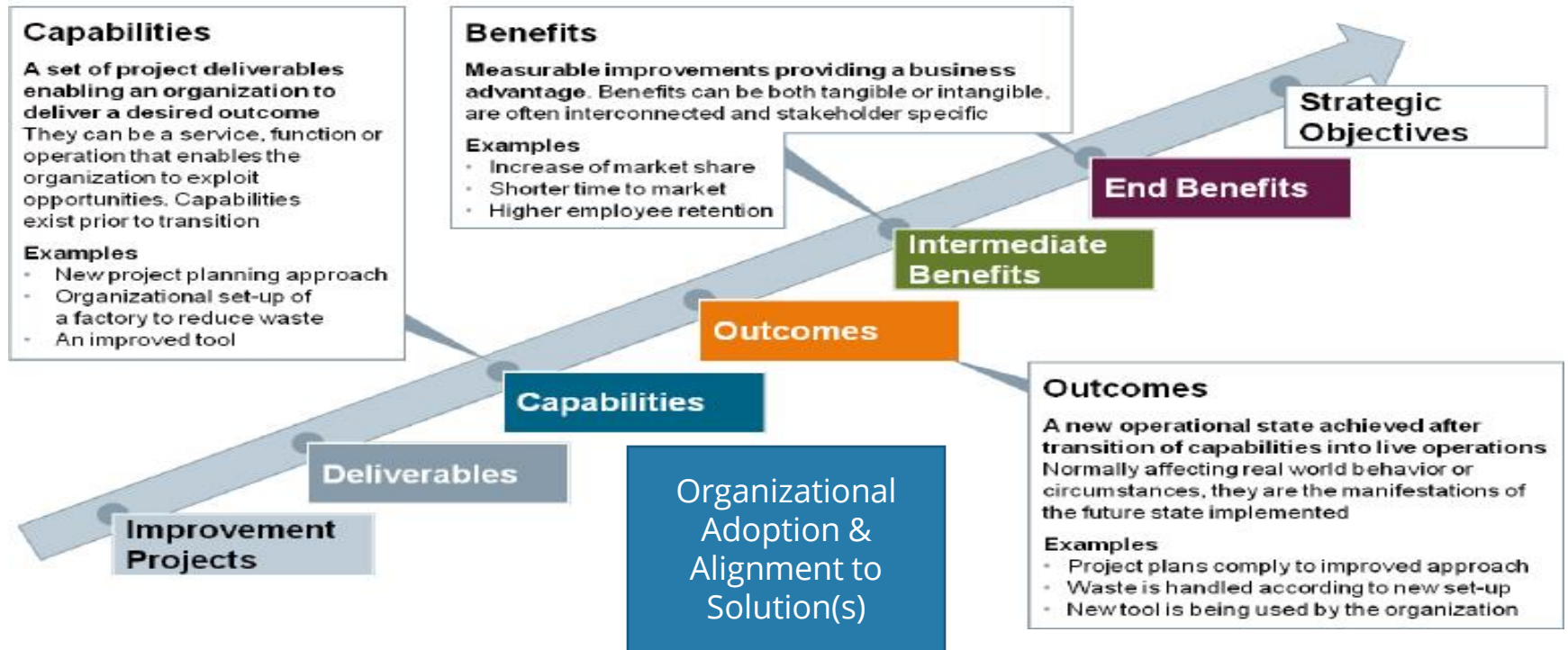
Taking responsibility for the results I produce

Discipline

Having the perseverance to **always follow through**

Implementation Science AND Benefits Realization Management require executing on this causal roadmap

Path between improvement projects and strategic objectives



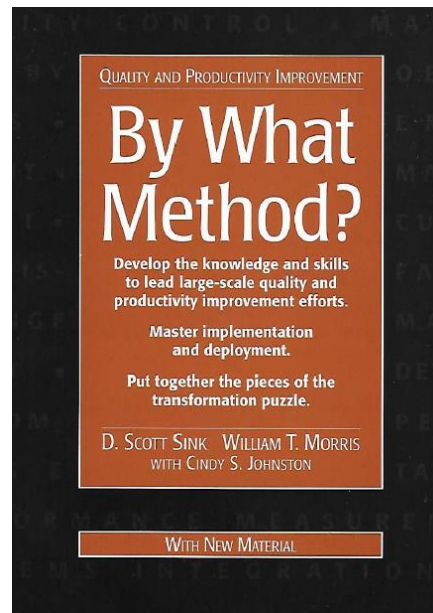
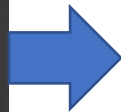
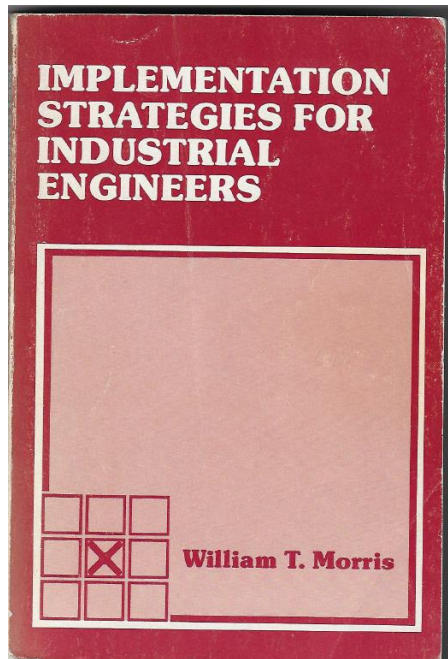
By What Method and How will We Know?



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Implementation Science has evolved over the past 40 years...as you would expect



These two books focus on the behavioral, sociological aspects of being a good ISE AND also excelling at being a Change Master.

Implementation Science and Benefits Realization Management has become broader and more complex but still can build from these foundations.

Bill Morris focused on how the ISE has to develop style flexibility to be successful as a Change Agent....

Facilitating ('to ease the passage of') strategy workshops is demanding, challenging, an art probably more than a science.

A successful leader of strategy workshops has acquired the ability to bring the right professional mode of functioning to bear at the right time:

- Acceptant Listener
- Data/fact gatherer, Inquiry Mode
- Small group process provider
- Challenger
- Opinion Seeker/Opinion Giver
- Solution provider
- Coach/Mentor
- Teacher/knowledge and skill provider
- Catalyst



Many versions of requirements for Process Improvement Change Agents exist, this is a nice one.

The Top 8 Skills Every Healthcare Process Improvement Leader Must Have



1 Communication

Clearly articulating concepts is the **#1 skill** for anyone who works in process improvement.

2 Trust Building

Articulate and communicate the vision to **build trust** that the outcome will be better than before.



8 Seeing the Big Picture

Managing the step-by-step details while keeping the **ultimate goal** in mind.



3 Coaching

Be a **good coach**: be supportive and know when to critique something that needs to be improved.



7 Resilience and Persistence

Tirelessly addressing resistance is the hallmark of a successful process improvement leader.



4 Understand Process Management

Understand the current **process**, determine a solution, and design & implement the new process.



6 Constructive Accountability and Conflict

Create an environment of constructive **accountability** to shatter the mold of "that's the way we've always done it."

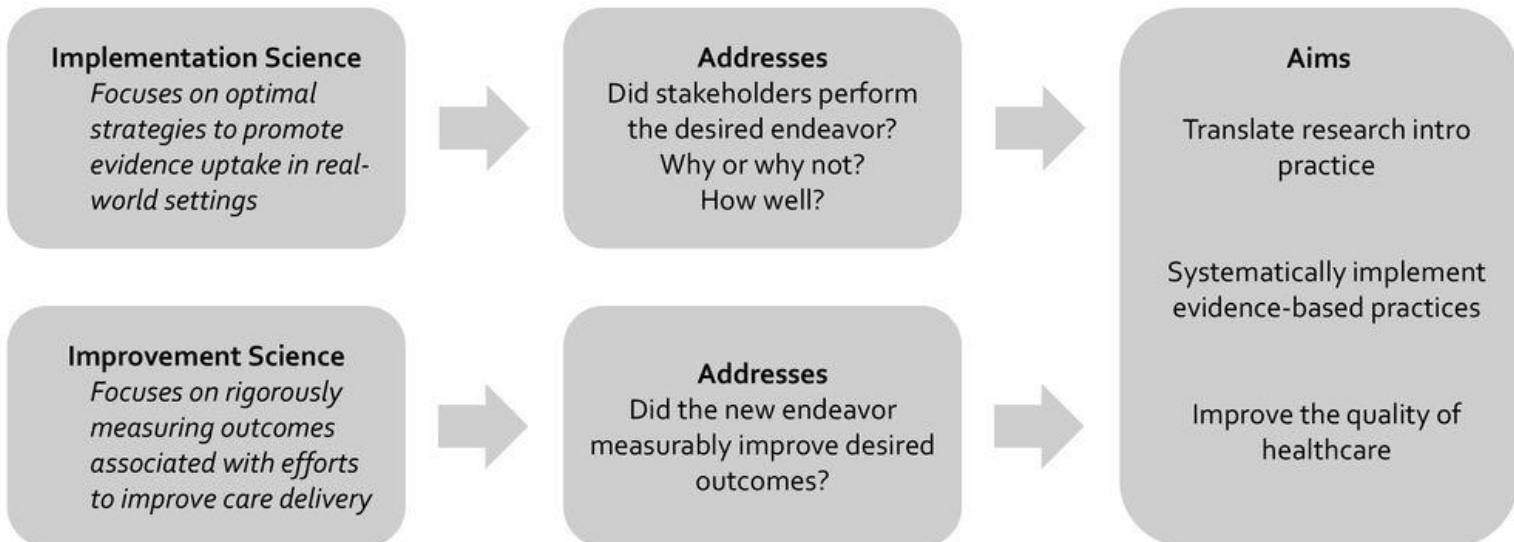


5 Understand Care Management Personnel

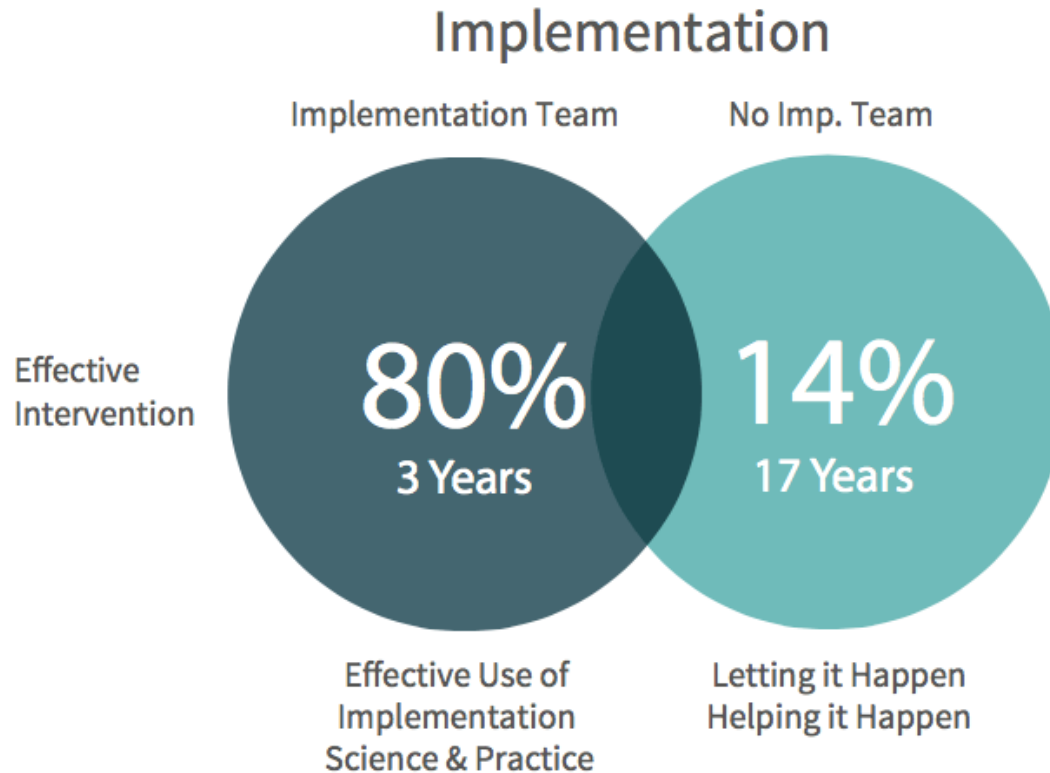
Understand how the process relates to the real environment, including **frontline workers**.

Much of the work I've found in Implementation and Improvement Sciences emanates from Healthcare

Overview: Implementation & Improvement Sciences



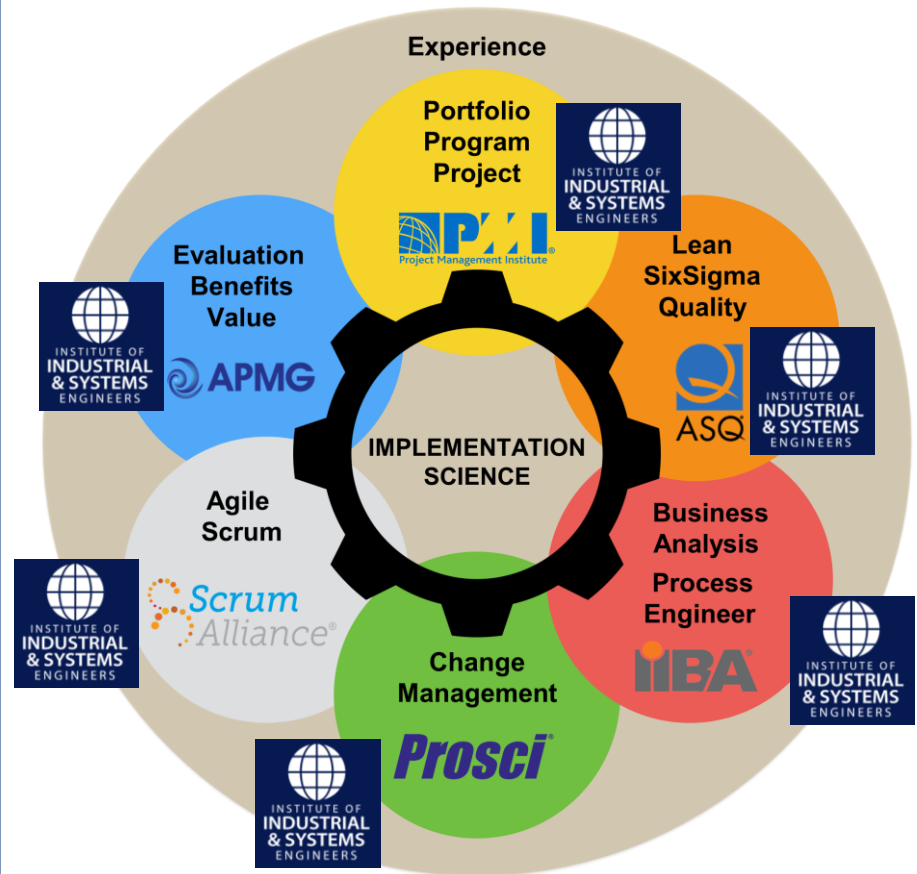
This aligns to my experience working in Healthcare and Not-for-Profits and School Systems the past 15 years.



<https://www.illuminateed.com/blog/2015/08/implementation-the-case-for-using-a-systematic-approach-to-software-implementation/>

Implementation Science 4.0 (2021)

- *Impactful delivery of solutions benefiting your organizations*
- *Picking the right Projects: Portfolio, Program and Proj Mgmt.*
- *Integrated LeanSigma & Qual & Productivity Improvement*
- *Agile, Sprints, Scrum*
- *Business and Business Process Analysis*
- *Process Engineering and Reengineering*
- *Change Leadership and Management*
- *Benefits Realization and Value Measurement*

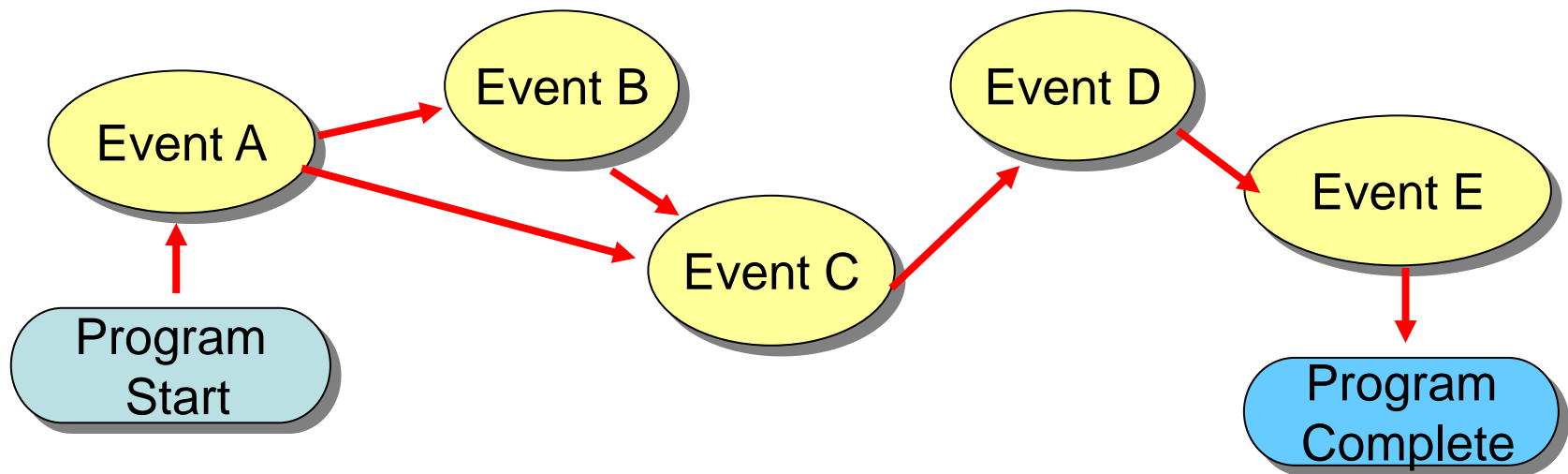
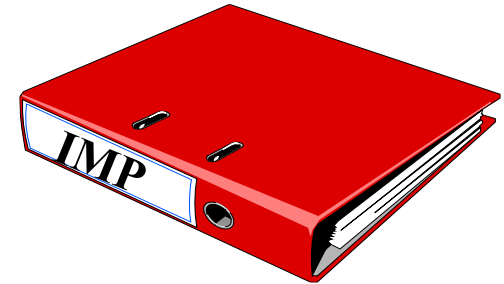


My simplified points of view on where to start (practical first steps) with implementation science

1. **Do your homework.** Get **intentional** about making implementation and benefits realization a science and not something that's ad hoc.
2. **Develop the knowledge and skillsets** required to lead Implementation Science and Benefits Realization Management in your Organization.
3. Start with understanding the **Creation Process**, build on your understanding of the Problem-solving process. (Senge and Fritz)
4. Study up on **Integrated Master Planning** vs Integrated Master Schedule
https://herdingcats.typepad.com/my_weblog/2017/11/integrated-master-plan-revisited.html
5. Bring discipline to 'accountability'. Establish **weekly Progress and Performance Updates**, retrospectives. IMP's weekly with P&P updates.
6. **Train and develop your Change Agents**, boot camps on personal and professional mastery to ensure "At-Cause" thought, word, deed.
7. Introduce **Strategy Workshops** as a core component in your Performance Management Process. (see IISE Performance Excellence Webinar, 15 April 2021)
8. Manage your Portfolio of Improvement Projects Macro and Micro with the same level of discipline and intentionality. **Every project is a mini transformation** towards improved process capability and performance excellence.

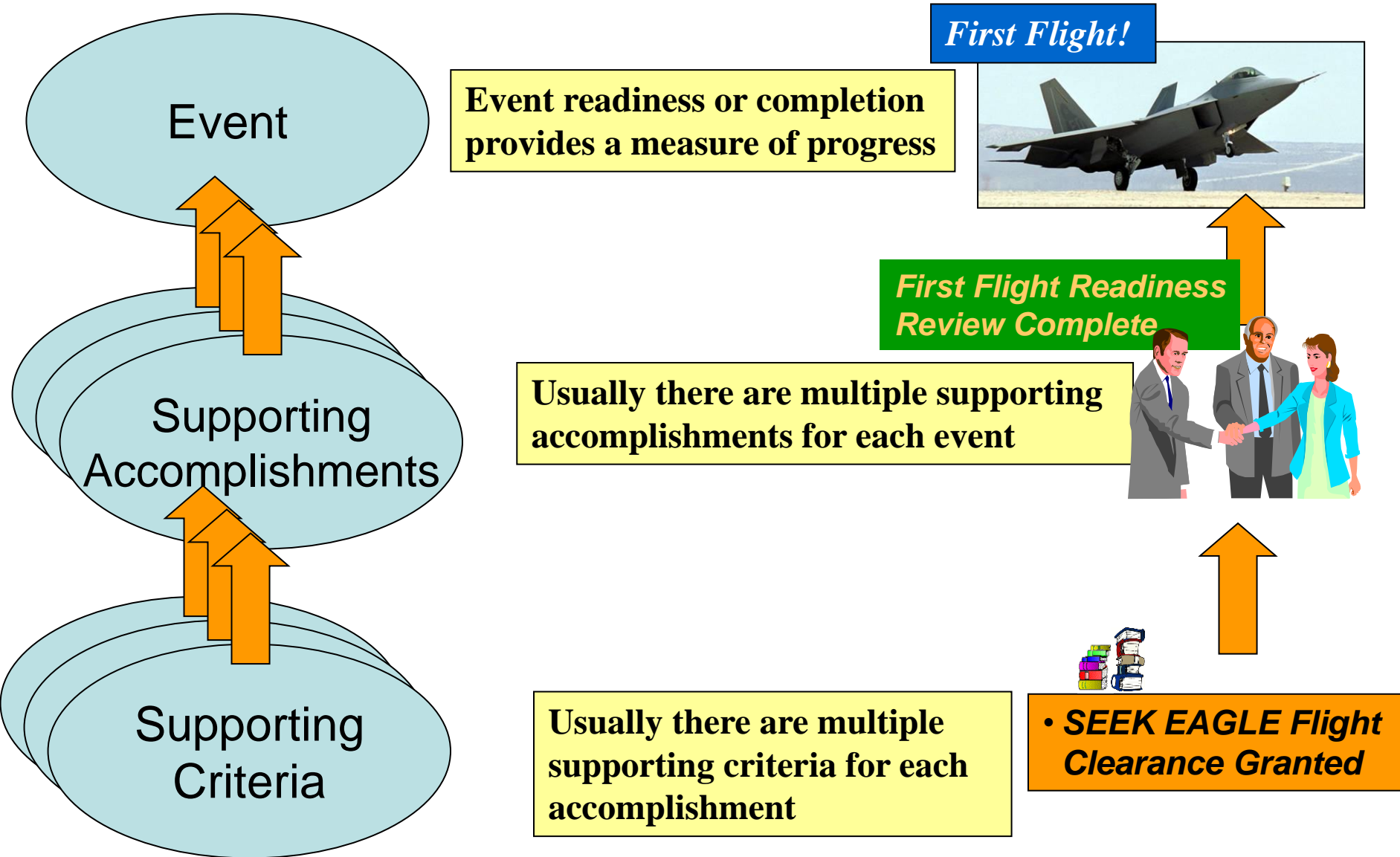
What is an IMP?

- An event-driven plan for executing the program



- Not a calendar based plan
- Becomes a contractual document (or Commitment in our case)

The Way the IMP Works!



Event

Event readiness or completion provides a measure of progress

First Flight!



First Flight Readiness Review Complete

Usually there are multiple supporting accomplishments for each event



Supporting Accomplishments

Usually there are multiple supporting criteria for each accomplishment

• **SEEK EAGLE Flight Clearance Granted**

Supporting Criteria

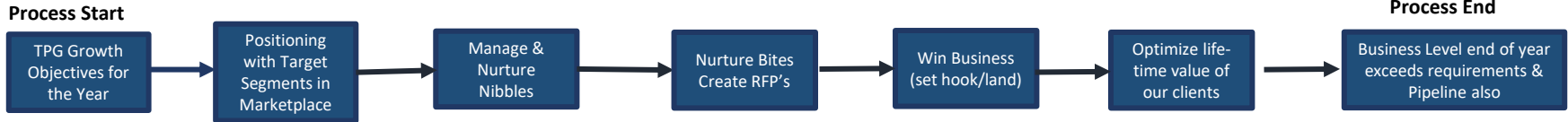
INTEGRATED MASTER PLAN vs. INTEGRATED MASTER SCHEDULE

- **INTEGRATED MASTER PLAN (IMP) – provides a single plan describing the fundamental structure of the program**
- **Focuses the integrated product team (IPT) team on the customer requirements through deliverables rather than through TASKS**
- **Establishes an agreement between all members of the IPT on these deliverables**
- **Defines the program in terms of EVENTS, ACCOMPLISHMENTS, and CRITERIA for these accomplishments**
- **Establishes the CRITERIA and objectives for program success**

- **INTEGRATED MASTER SCHEDULE (IMS) – provides a TASK and calendar based schedule at a level necessary for day-to-execution of the program (this is similar to a Gantt Chart or WBS)**

Integrated Master Plan

PURPOSE STATEMENT: Define the next phase of Process Maturity Improvement for the Business Development Process



Current Characterization of PML June 2021

Current State Characterization:

- The process has improved.
- The process has performed well, results wise, this year.
- The process is 'managed' but not 'defined'
- We don't 'measure', statistically, time series, graphically, the 'buffers', counts of organizations in each stage of the process.
- Best practices and core workflows for BD and Marketing teams are stored in the minds of employees (there are limited written reference materials for who does what when, how, etc.)
- There is no contingency plan for transfer of knowledge in case of sudden loss of key personnel
- *There has been a need for a Business Tech Person to manage the proposal process that has not been met.*

Sprint Strategy and Plan



November 2021

DONE November:

- The detailed plan for taking Business Development to the next level of process capability and performance is complete and ready to share at Off-site
- The Bus Dev Workflow, level 1 is Defined out to level 2 (not level 3!!!)
- Performance Requirements for BD Process for 2022 Defined, established
- Flow Requirements and Measures established, Pipeline Health Operationalized (Scorecard)
- Roles, Responsibilities, Accountabilities, Performance Requirements are clear and explicit
- Position Descriptions for the 'seats on the bus' for Bus Dev Team are current, real, clear, complete.

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P&P Updates: I send end of week memo's to the team and key stakeholders

Significant Accomplishments This week

We promised this....

We delivered this...

Significant Accomplishments Next week

Based on our IMP we need to create these deliverables, results next week to stay on track to DONE...

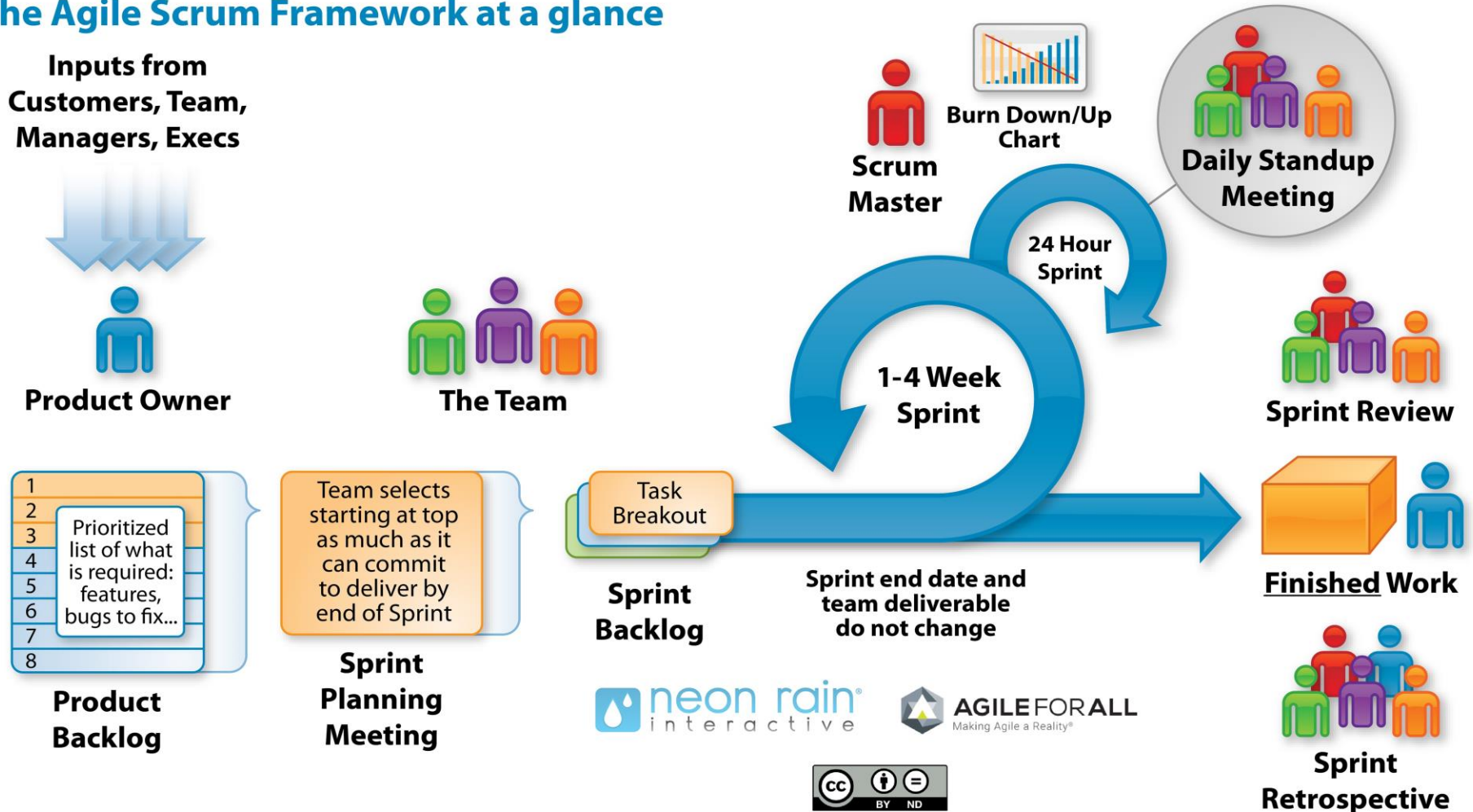
Through to DONE...

- Status time wise
- Status Requirements for Success wise
- Anything that needs to be escalated to resolve?

DONE is this...

P&P Updates: In Agile, there are also similar 'mechanisms'

The Agile Scrum Framework at a glance



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Operational Excellence 4.0: How to Create Strategies for 'Transformation' that Work



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CEO, The Poirier Group
Immediate Past-President,
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Global Perf Excellence Webinars
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Debbie Nightingale
Exec Transformation
Specialist
MIT and Central Florida
Past President IISE



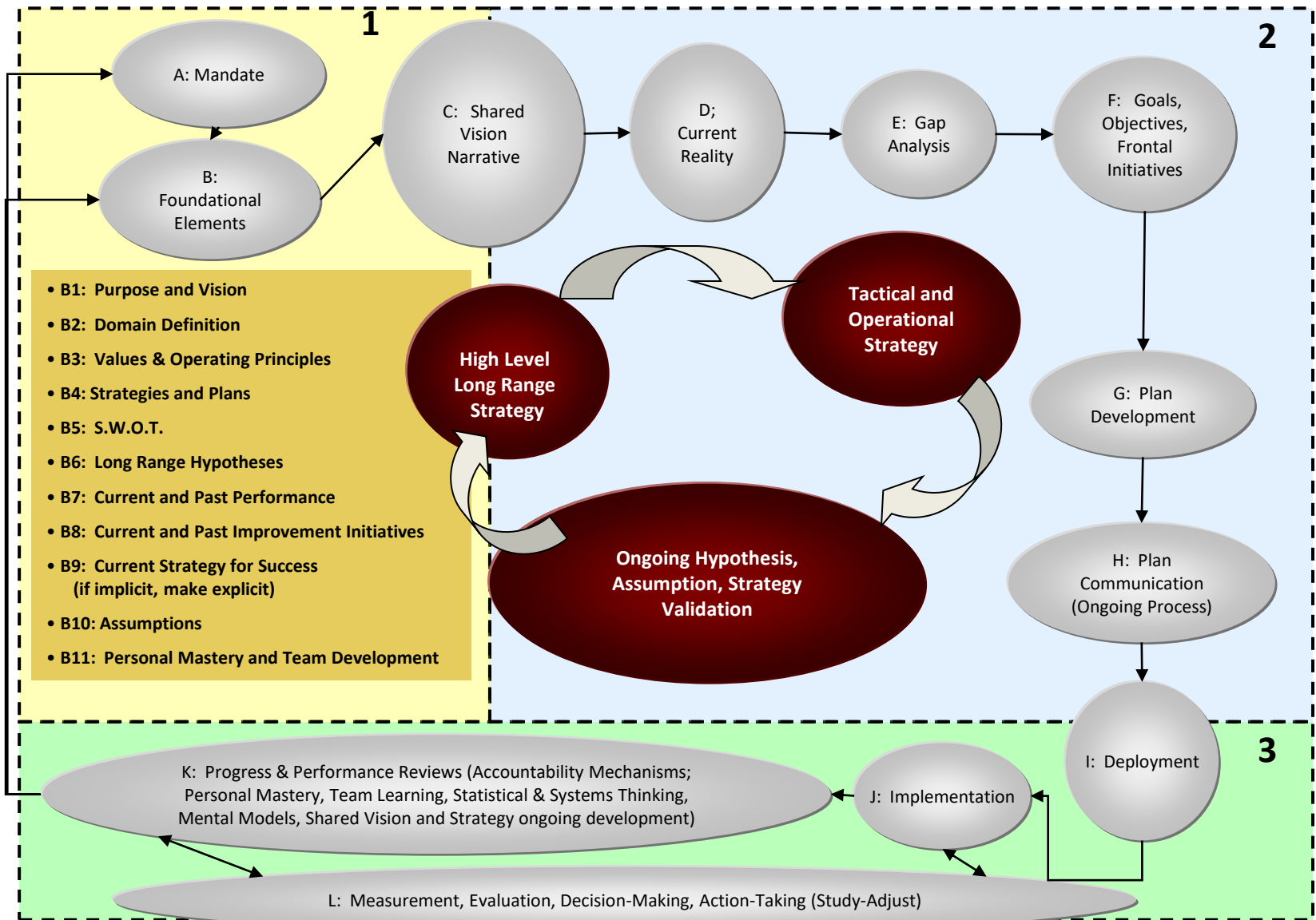
ANNUAL

CONFERENCE & EXPO 2021

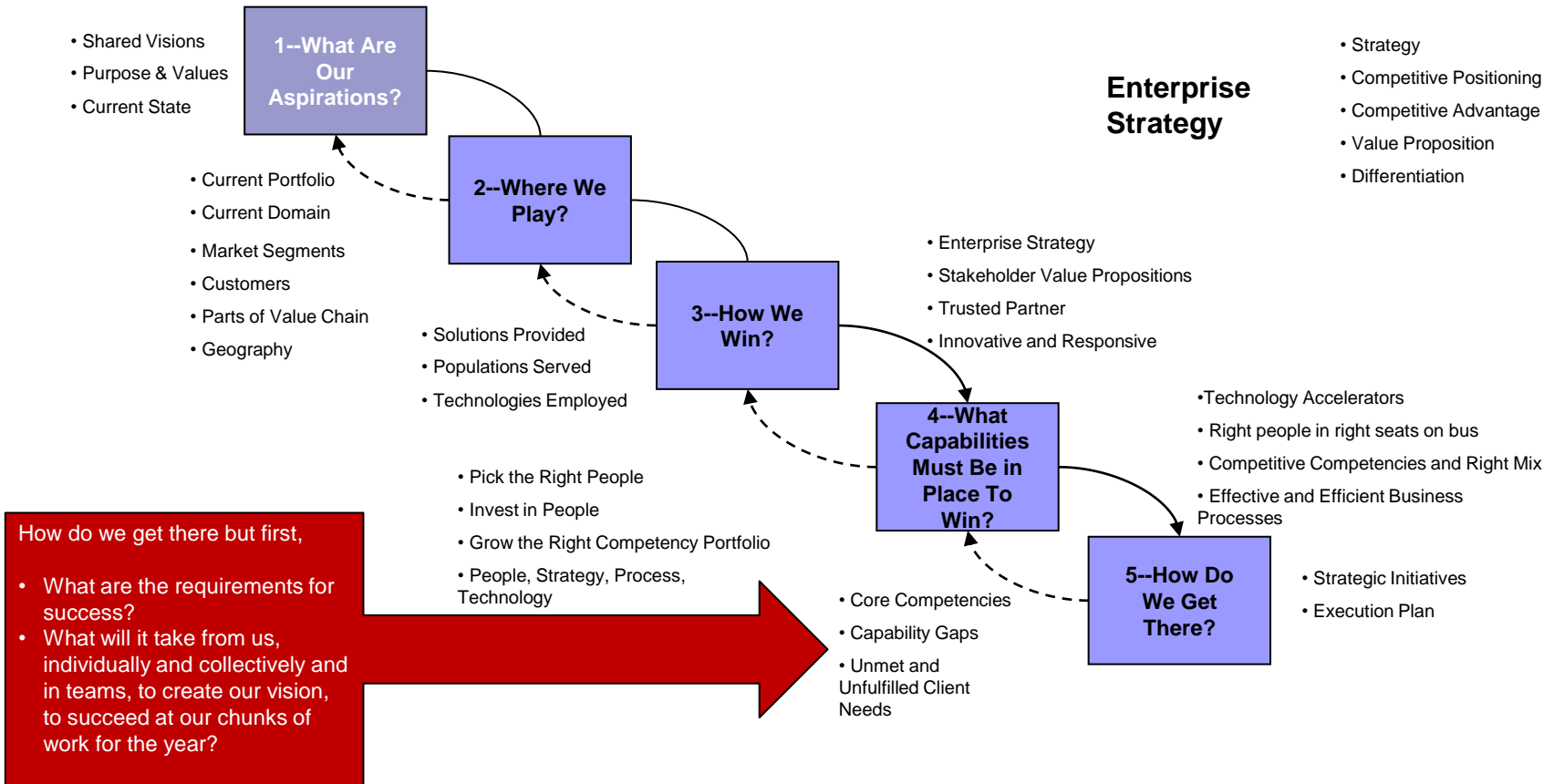
VIRTUAL CONFERENCE

MAY 22 – 25, 2021

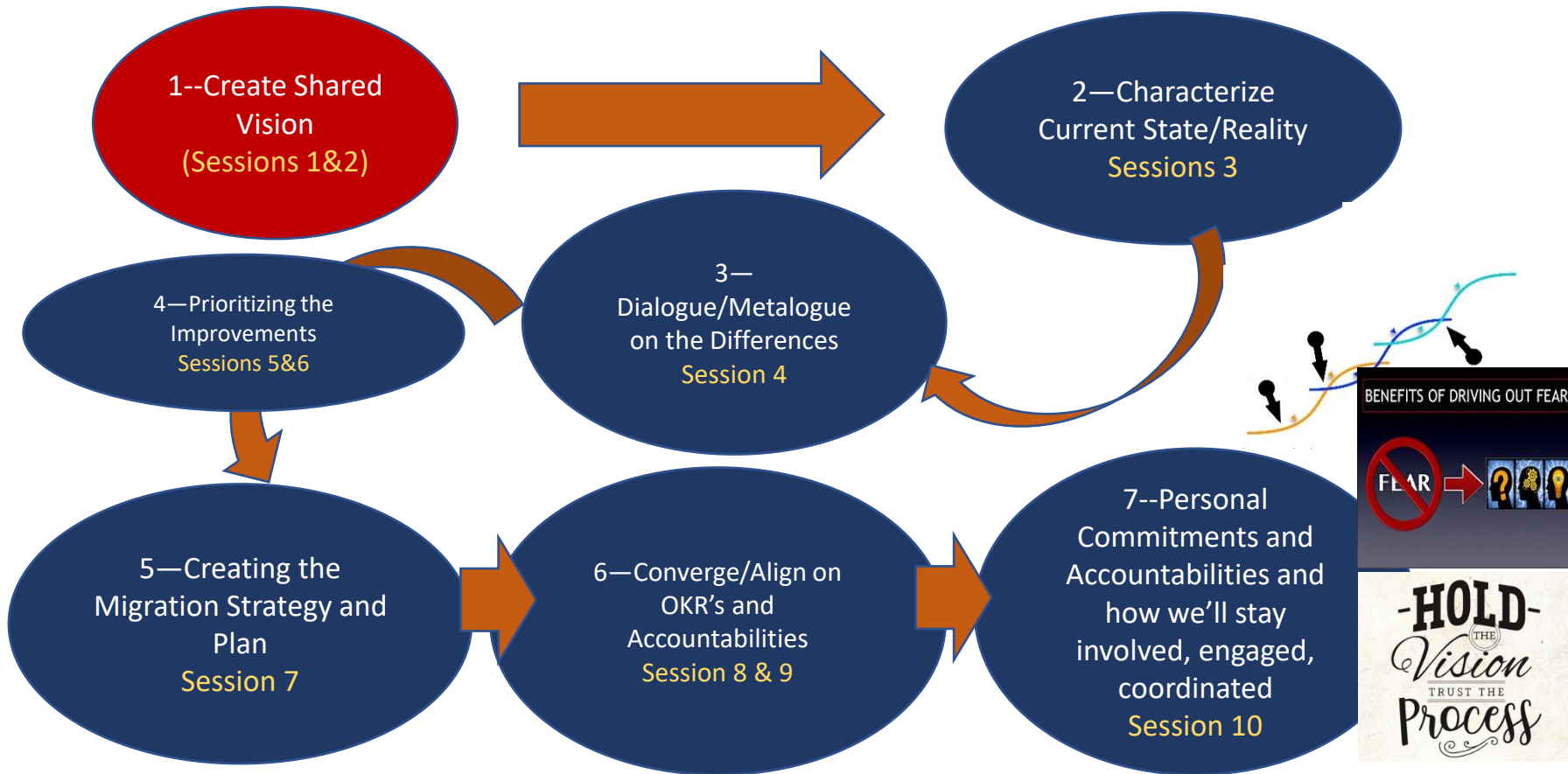
1 1. Strategy and Policy Formulation--Prepare to Plan (compiled in a Fact/Info Book)
 2 2. Planning Process
 3 3. Implementation, Deployment, Study, Adjustment/Improvement Process



This is an example of a strategy model that we often use and it runs in the background as we walk through the roadmap



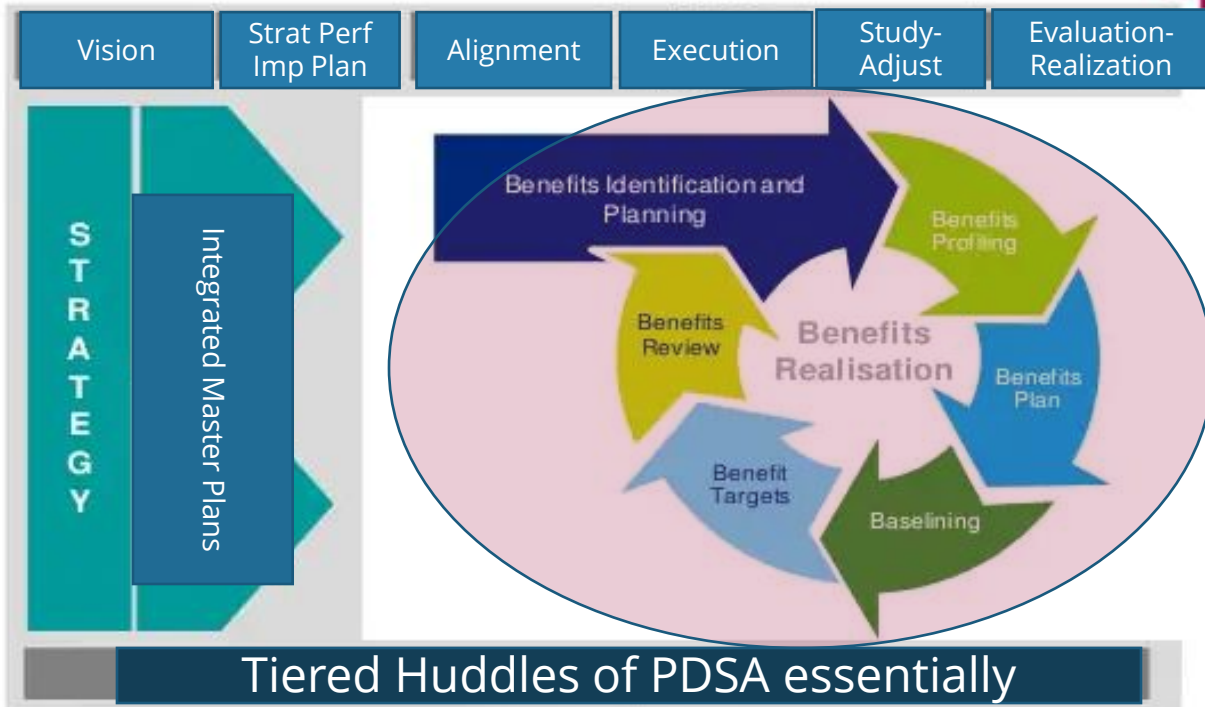
The Simplified General Method



With a larger organization we did this in 10, :90 virtual workshops.
With BBBST we accelerated and got through step 6 in 3 :60-90 minute workshops

An illustration of the context for our conversations today

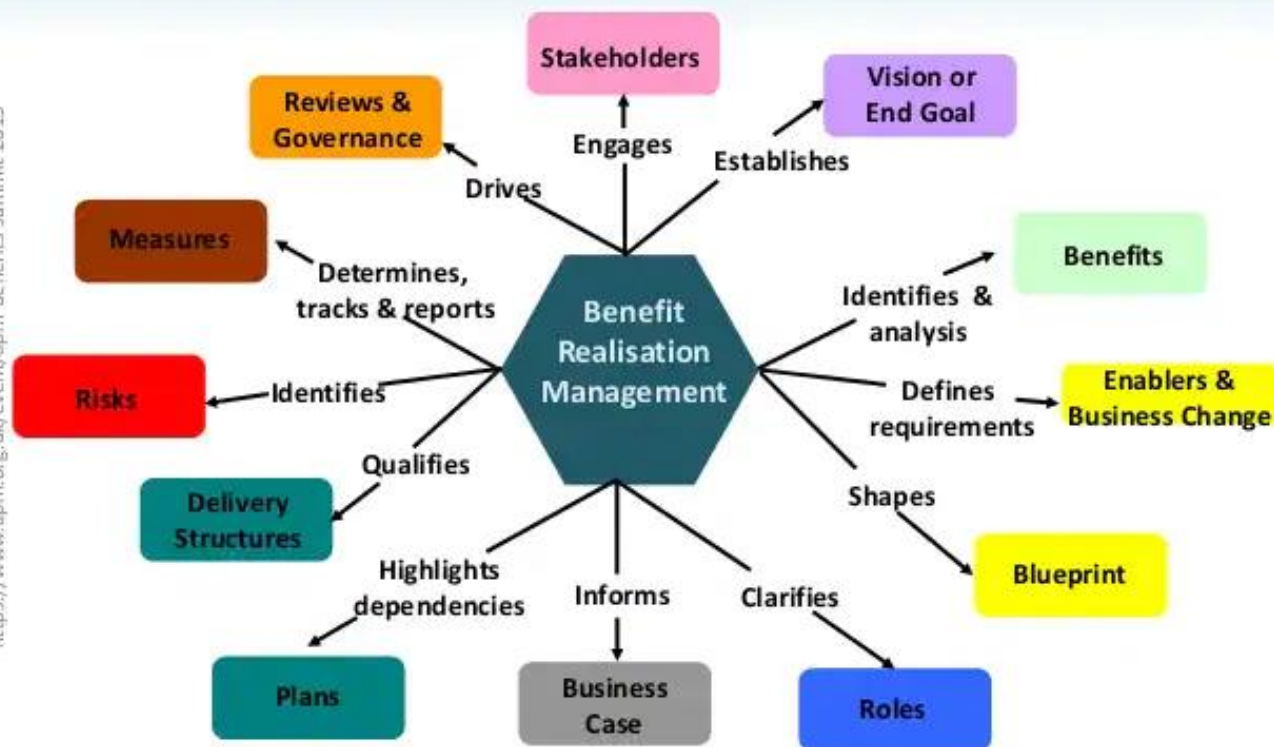
See our Strategy Workshop Webinar
<https://www.iise.org/details.aspx?id=46729&>



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

A disciplined approach to Benefits Realization Management is an often neglected component of Process Improvement “Control” Stages

The centrality of BRM

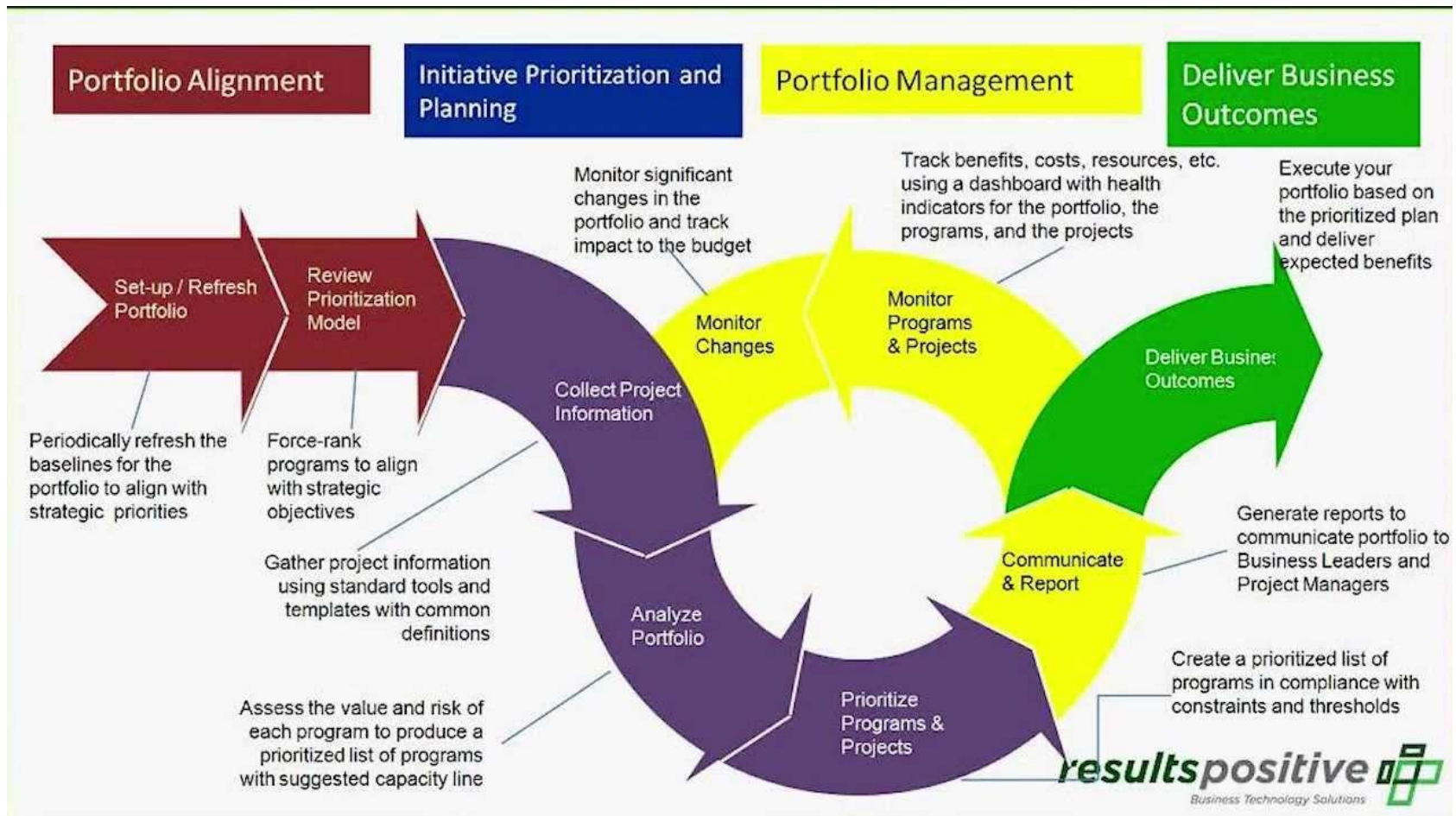


Key 'words' here:

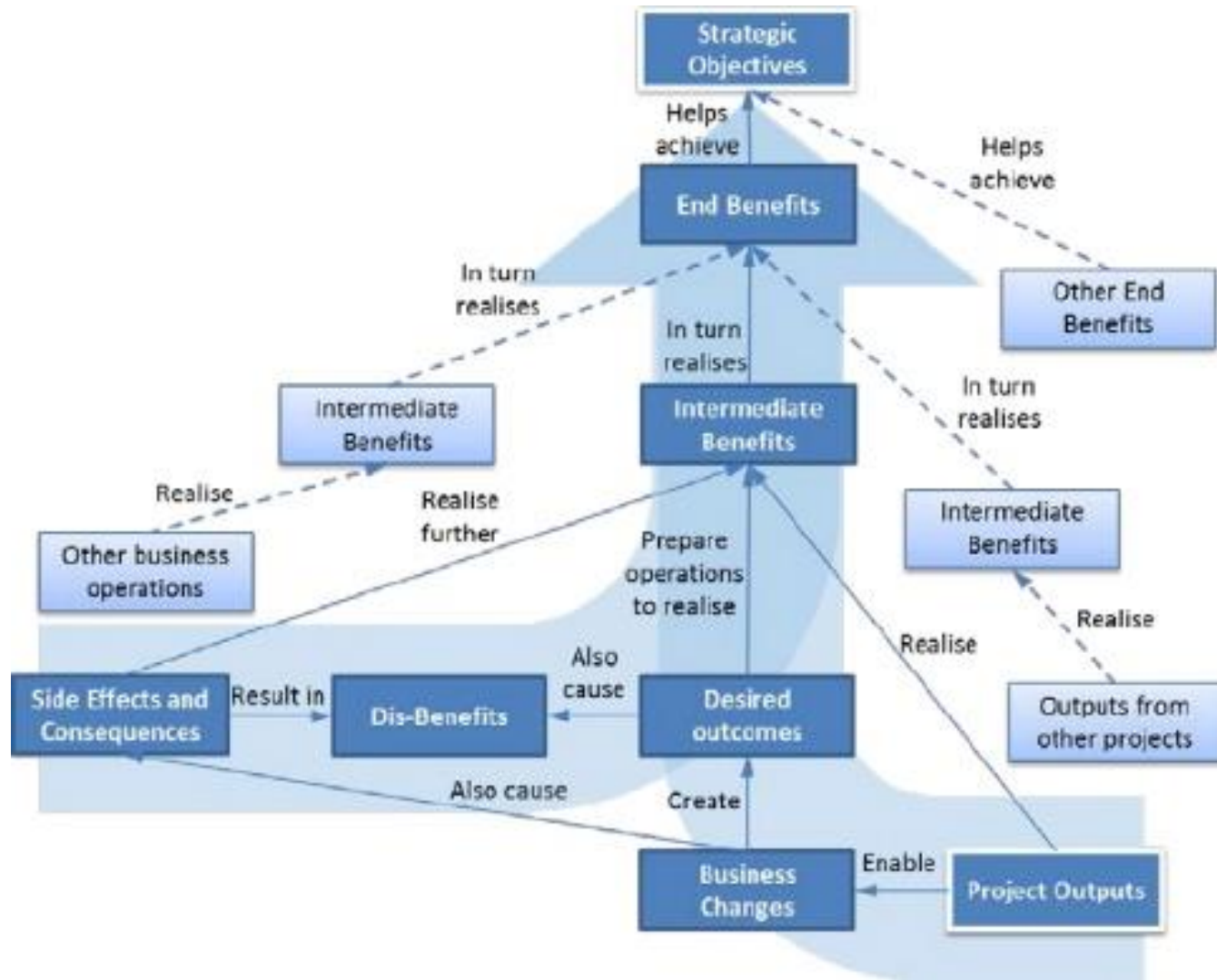
- Drives
- Engages
- Defines Requirements
- Clarifies
- Informs
- Qualifies
- Determines, tracks, reports
- Dependencies

<https://www.apm.org.uk/event/apm-benefits-summit-2015>

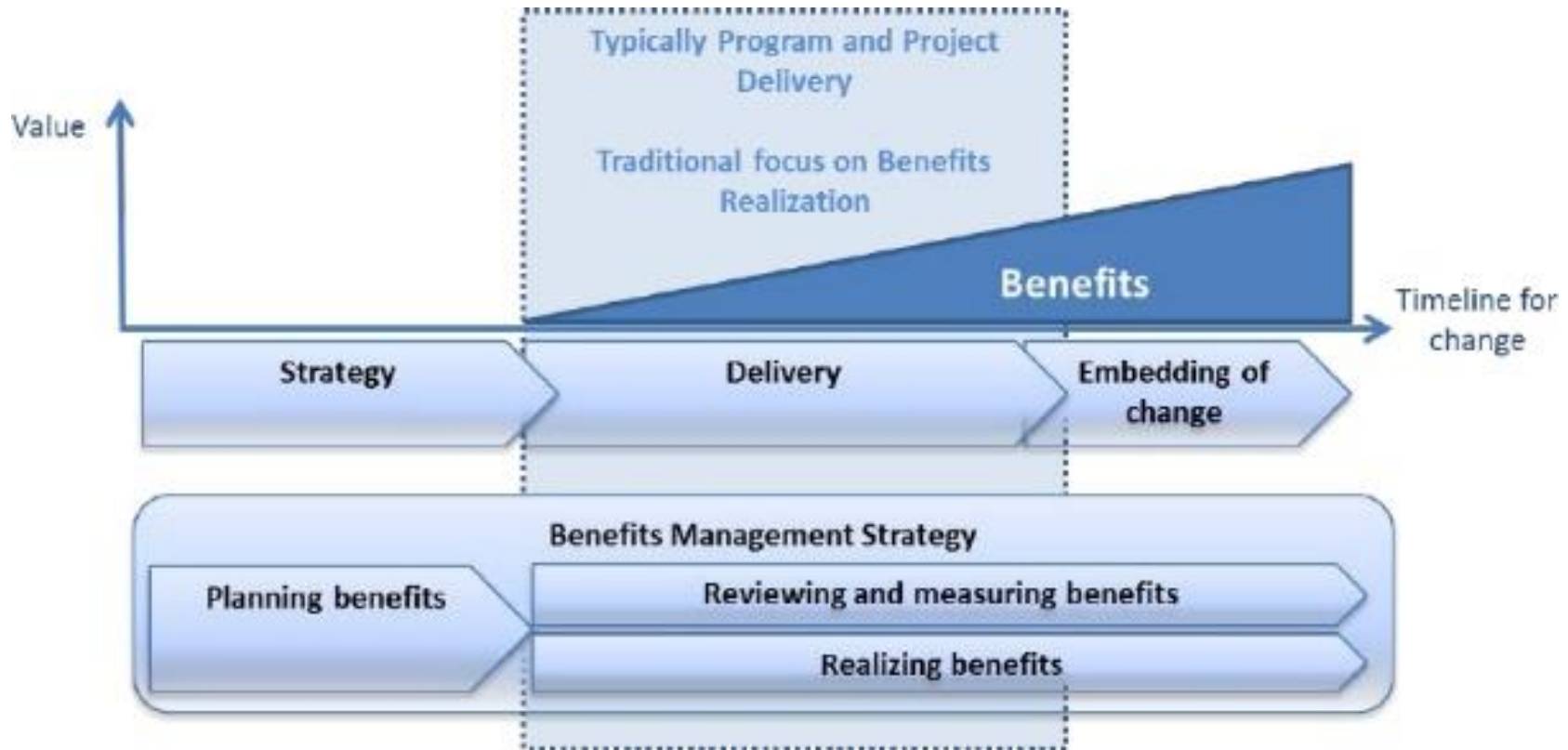
Another IoT example of the process we will be discussing today



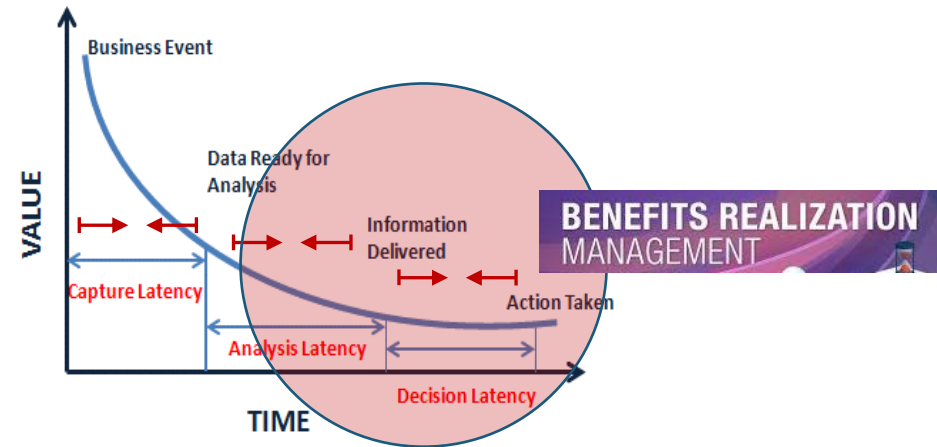
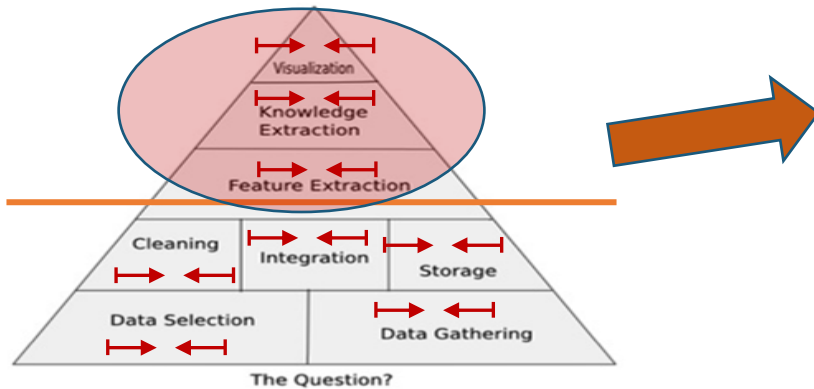
Yet another that I liked....



Another view—goal is to speed up benefits realization



We discussed how Op Analytics can accelerate and support Benefits Realization Management in recent webinars...



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.

To really manage BR you have to evolve from “Reports” in Power BI to Visualizations that Provoke timely decisions and actions...

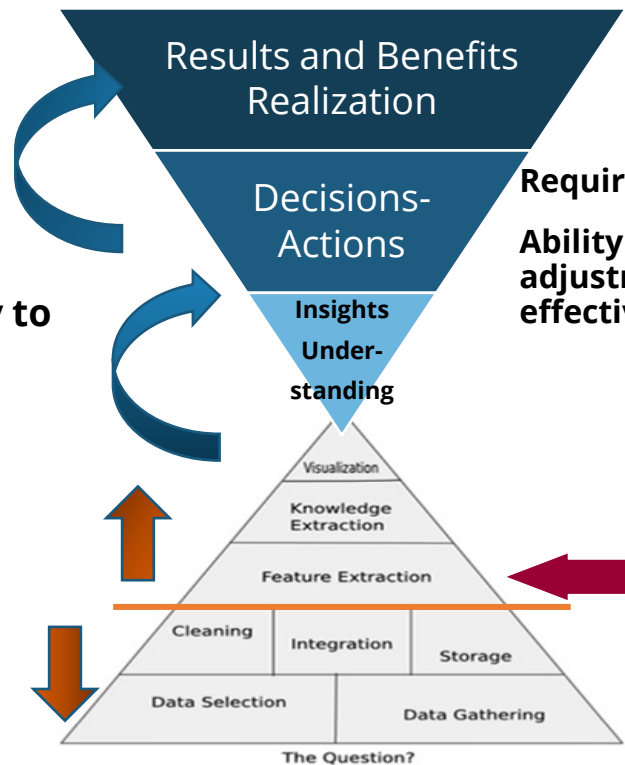
Requirement:

Driving Results that are Verifiable, Realized, and Sustainable

Requirement: Capability to portray information, decision/action support

Requirement: Analytics Capability

Requirement: Data Management Capabilities



PML 1-2

PML 2-4

PML 1-2

PML 2-4

PML 3-4

Requirement:
Ability to make improvement adjustments rapidly and effectively

Most of reports and charts are here

To Recap: your next steps to improving your ability to improve Implementation and Benefits Realization....

1. **Do your homework.** Get **intentional** about making implementation and benefits realization a science and not something that's ad hoc.
2. **Develop the knowledge and skillsets** required to lead Implementation Science and Benefits Realization Management in your Organization.
3. Start with understanding the **Creation Process**, build on your understanding of the Problem-solving process. (Senge and Fritz)
4. Study up on **Integrated Master Planning** vs Integrated Master Schedule
https://herdingcats.typepad.com/my_weblog/2017/11/integrated-master-plan-revisited.html
5. Bring discipline to 'accountability'. Establish **weekly Progress and Performance Updates**, retrospectives. IMP's weekly with P&P updates.
6. **Train and develop your Change Agents**, boot camps on personal and professional mastery to ensure "At-Cause" thought, word, deed.
7. Introduce **Strategy Workshops** as a core component in your Performance Management Process. (see IISE Performance Excellence Webinar, 15 April 2021)
8. Manage your Portfolio of Improvement Projects Macro and Micro with the same level of discipline and intentionality. **Every project is a mini transformation** towards improved process capability and performance excellence.

How'd We Do?



Customer and Member Satisfaction and Feedback Survey

Implementation Science and Benefits Realization Management: The New Industrial and Systems Engineering



INSTITUTE OF
**INDUSTRIAL
& SYSTEMS**
ENGINEERS

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!

**Please consider
joining our
remaining
Professional
Development
Webinars the rest
of the year starting
on the 7th of
October.**



Contact us for More Info:

Scott Sink:

- <https://www.linkedin.com/in/dscottsink/>
- ssink@jumpcurves.com



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 IIESE by clicking on this link.

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Boost your career. Add knowledge to your ISE toolkit. Select from any (or all) of the IIESE Performance Excellence Webinar tracks below to hone your skillset to its maximum and improve your organization.

Performance Excellence topics include ...



Accelerating Benefits Realization

Dive into agile and other methodologies that speed up operational results and bottom line impact.

- Disruptive Innovation in Distribution: From Weeks to Days to Hours
- Agile Methodology to Enable Rapid Process Innovation and Improvement
- The Agile Scrum Process for Process and Product Improvement
- Rapid (AGILE) Deployment and Execution of Integrated Systems Engineering Principles and Methods in Times of Major Disruption

[Back to top]



Just Ahead.....

Oct 7: Business Process Management 4.0—Glimpse of what's ahead

<https://attendee.gotowebinar.com/register/7929275855425721356>

11 Nov 11-12 pm EDT

Lean Transformations: Big Guys vs Little Guys

<https://attendee.gotowebinar.com/register/5406097880974145547>

November:

- **How to Successfully Deploy Integrated LeanSigma in the context of an Operational Excellence Program**
- **Operational Analytics Deployment Strategies and Case Example**
- **IISE Annual Conference Seattle-Performance Excellence Track Sneak Preview**

December:

- **Operational Excellence:** What does a GREAT Op Ex Program look like and do and how do ISE's fit in to those type of Programs?



An Operational Analytics Certification will significantly enhance your foundational training

Overview

Organizations are swimming in data, colloquially they are data rich and information poor.

Migrating from Data to Information to Insights and Understanding to Decisions/Actions and ultimately to Business Benefits Realization is the end game.

Organizations are losing at this game today because they don't have the right knowledge and skill sets to execute the right strategies to harness the power coming from More Data and the ability to move it faster.

Professionals, perhaps most importantly, students in ISE, that become proficient at Operational Analytics will have unprecedented career opportunities.

This program is focused on building your knowledge and skills in a tiered fashion—Understanding to Principles, Methods, Tools to Application Skill Development as the foundation. This comes from this initial blended training program.

Sitting on top of that base, we'll support your migration to higher levels of Mastery (Analysis, Solution Creation, System Design and Development, Deployment) with the Certification portion of this program.

Advanced Mastery Level
(Advanced Certification)

Reduction to Practice
Skills (Certification)

Foundational Principles,
Methods, Tools
(Certificate)

Investment Requirement

Certificate:

~ 3-6 mos. Elapsed time

~ 220 hours (e.g. equivalent to 1, 3 credit hour U/G level class)

\$450 for ISE Students (must be members of IISE)

\$575 for Professional IISE members, \$725 for professional, non IISE members

Certification:

\$250 for Student IISE members

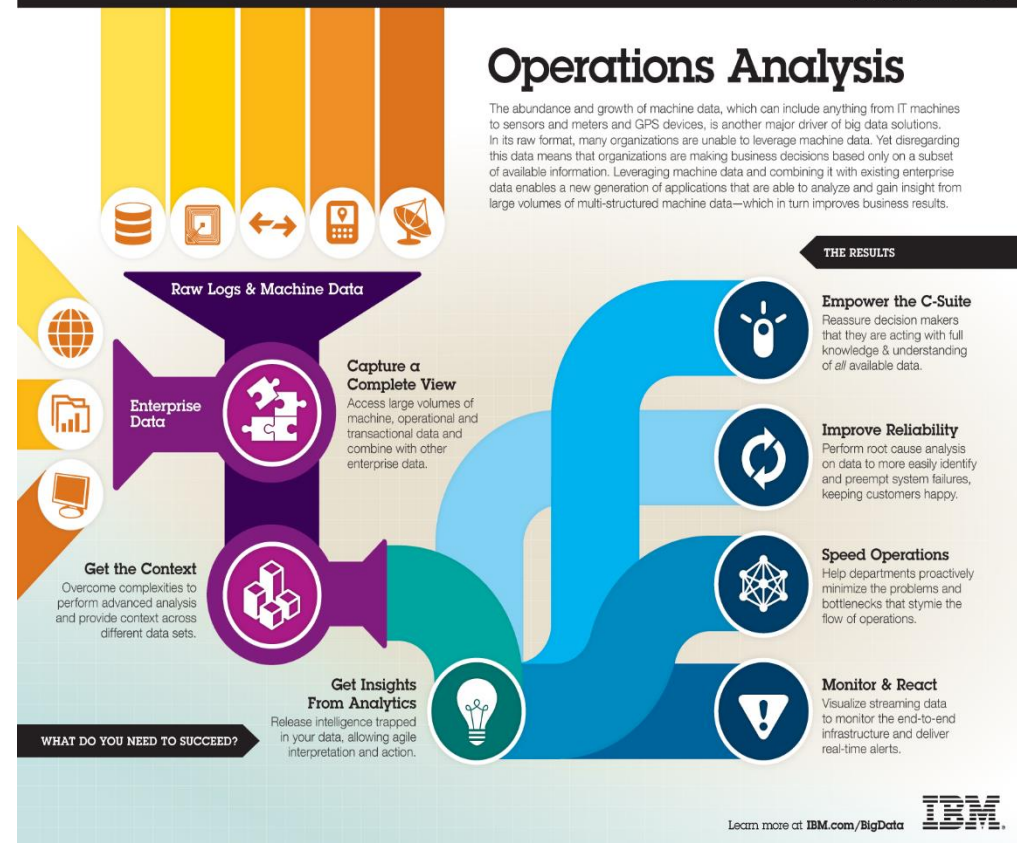
\$950 for Professional IISE Members, \$1250 for Professional Non-Members of IISE

We had several target audiences in mind when we designed and developed this course:

1. Industrial and Systems Engineering Undergrads (Seniors) and Grads who want to augment their BSISE degrees;
2. Young Professionals who want to expand Career possibilities, strengthen Resumes, LinkedIn Profiles and have a strong appetite for Analytics;
3. Business Intelligence Professionals who sense that there is more to Analytics than just creating lots of Power BI Reports and realize the real Leaders and Managers are overwhelmed with Data and frustrated that they can't get IT to support them, as customers, better.

Our Faculty Member, Ben Amaba, likes this slide!!

IBM, Big Data Use Cases



Course Modules and Learning Objectives

We have 10 Core Modules in the Course:

1. Course Overview and Guidance
2. Operational Analytics Perspectives and Points of View from Thought Leaders
3. Operational Analytics: The Data Management Role
4. Operational Analytics: The Analyst Role
5. Operational Analytics: The Data Scientist Role
6. Operational Analytics: Business Process Improvement and Integrated LeanSigma Role
7. Visible Measurement Systems, how to deploy to support Study-Adjust
8. Operational Analytics: The Management Systems Engineer Role
9. Operational Analytics: Case Studies
10. Operational Analytics Final Exam

Learning Objectives

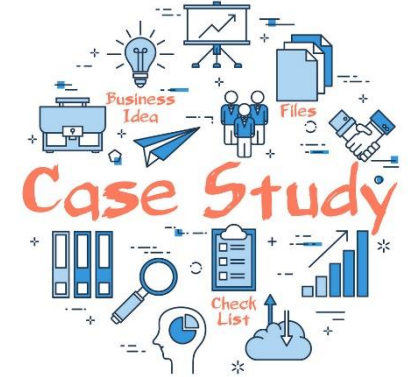
- Understand the Fundamentals of Operational Analytics through the Voice of Thought Leaders in this field
- Understand and Practice with the Data Management Role—how to get data, store it, organize it, cleanse it, integrate it...
- Understand and Practice with the Data Analyst Role—how to understand the voice of the ‘customer’, how to understand the fundamental questions that need answered, how to convert data to usable information
- Understand Data Sciences—advanced data capture, data management, data analytics by building intelligence and learning into our ‘machines’
- Understand and Practice with the application of Op Analytics to Business Process Improvement and Integrated LeanSigma
- Understand and practice how to bring all this together in the form of Engineered Management Systems and to integrate in Visible Measurement Systems and effective Study-Adjust processes.



Recently pre-recorded webinar recordings in 60 minute digestible chunks provided by thought leaders and faculty in our program. On-Demand.

Best-in-class Case Studies

- Op Analytics embedded in Process Improvement Projects (6 practical, industry diverse tollgate decks to help you internalize how this works)
- Data Sets from real world projects to aid you in developing reduce to practice skills



The LearnUpon LMS is intuitive and easy to use and has a way for us to Track your Practice work and interact as appropriate.

Practice Tracker Assignment Log

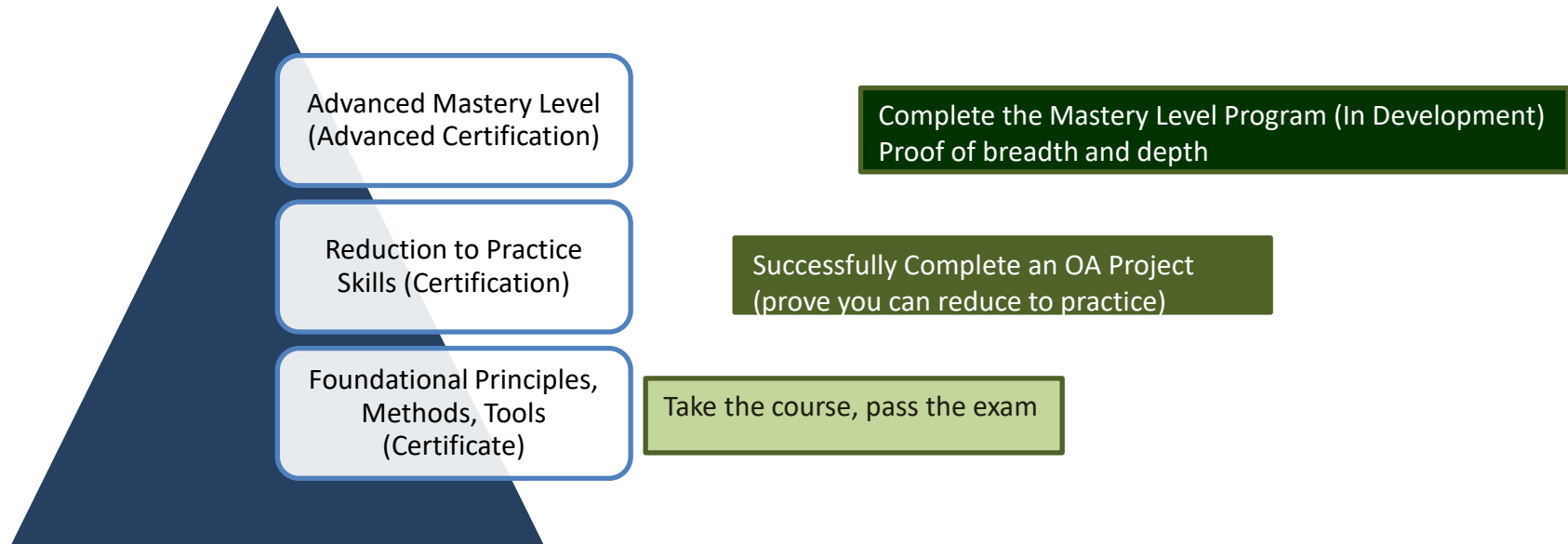


Virtual Coaching Sessions by Module provided by Faculty

Community Q&A/Chat Boards.

Live, synchronous training sessions monthly.

Competency Development Model





Special Offer to Webinar Participants today...

<https://www.iise.org/TrainingCenter/CourseDetail/?EventCode=OAO>

The 10% off Coupon Code is
OpAnalytics10