

INSTITUTE FOR PERFORMANCE EXCELLENCE



BALDRIGE | PERFORMANCE EXCELLENCE | QUALITY | LEADERSHIP

The Baldridge Foundation Institute for Performance Excellence

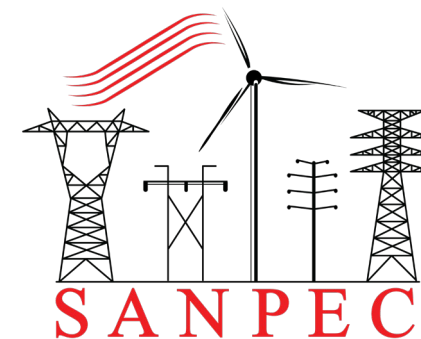
Presents:

Stop Visualizing and Start Utilizing: Making Data Work

April 25, 2024



Mac Baldrige Society Members



Opening Remarks/Agenda

Introduction	Jerry Rees , Chief Operating Officer Baldrige Foundation
Panelist	Paul Campbell , Executive Vice President Competitive Solutions, Inc.
Audience Questions	Moderator – Jerry Rees
Closing	Jerry Rees Remarks

Stop Visualizing and Start Utilizing: Making Data Work



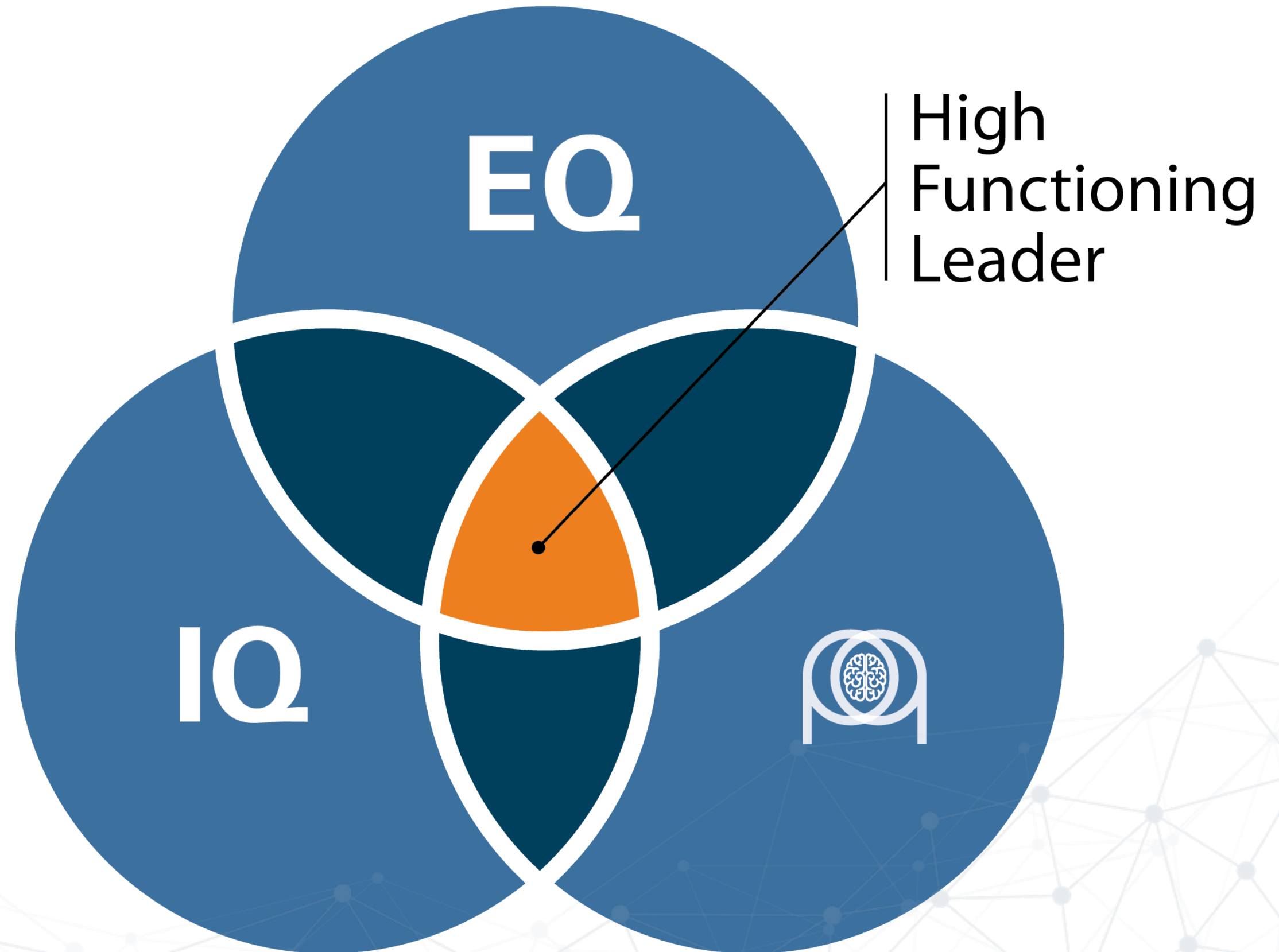
PAUL CAMPBELL
Executive Vice President



***IQ – Articulation of “What”
the metrics are...***

***EQ – Articulation of “Why”
people should care...***

***PQ – Articulation of “How”
the metrics will be used...***



High
Functioning
Leader

Competitive Solutions Inc.



Founded in 1991

Headquartered in Raleigh, NC

Global Consulting & Software Firm

Process Based Leadership®

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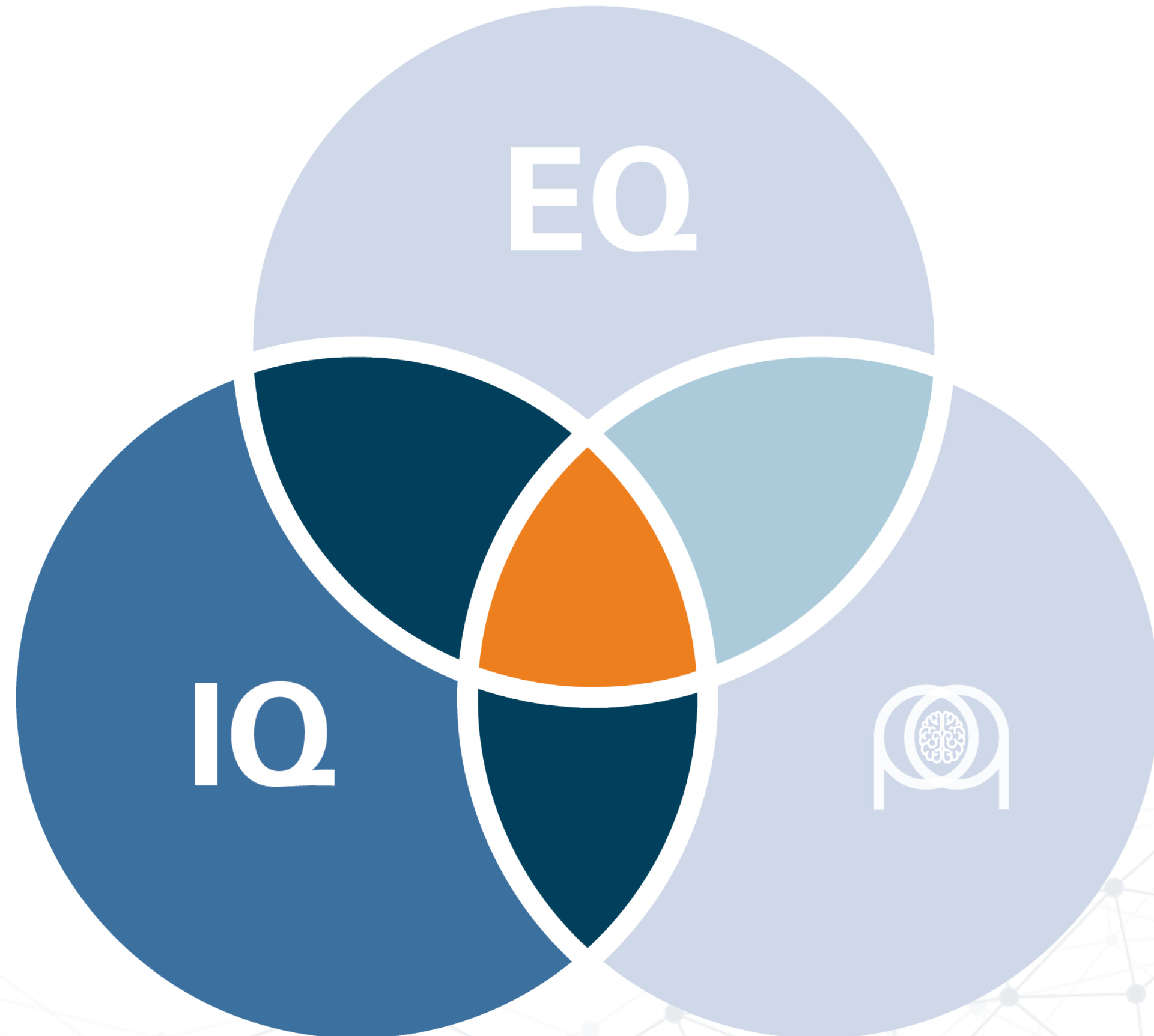
LEADERSHIP GPS



Characteristic #1

Educate:

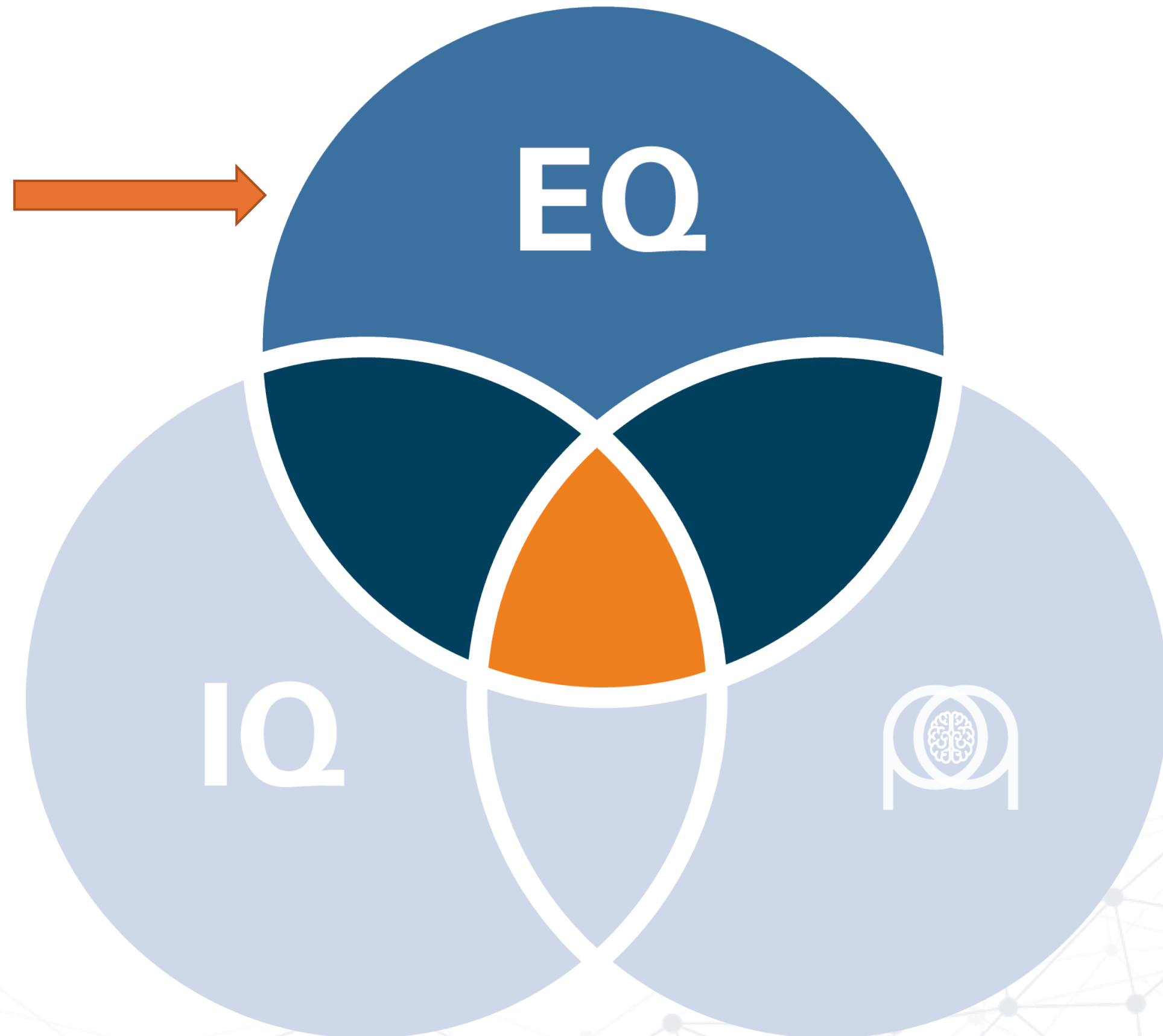
- *What do these numbers mean?*
- *Are the metrics understood throughout the team?*
- *“Are we winning or losing? Does anyone know?”*
- *Embedded in On-Boarding Process*

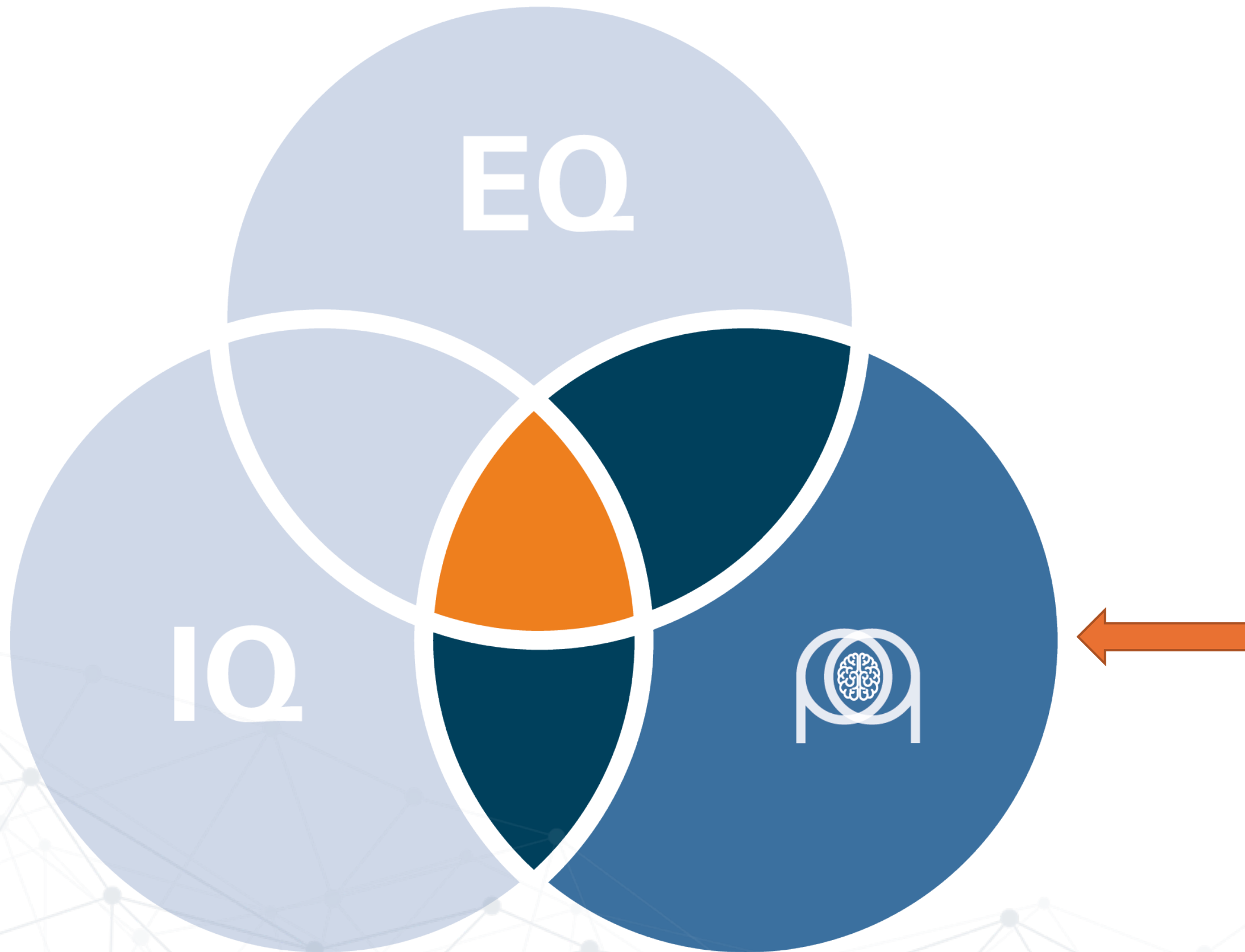


Characteristic #2

Motivate & Inspire:

- *Teaching the organization “Why?” should care about the data?*
- *Celebrating Wins and Driving Accountability on Losses*
- *Modeling Collaborative Problem Solving – “How can we move the business forward?”*





Characteristic #3:

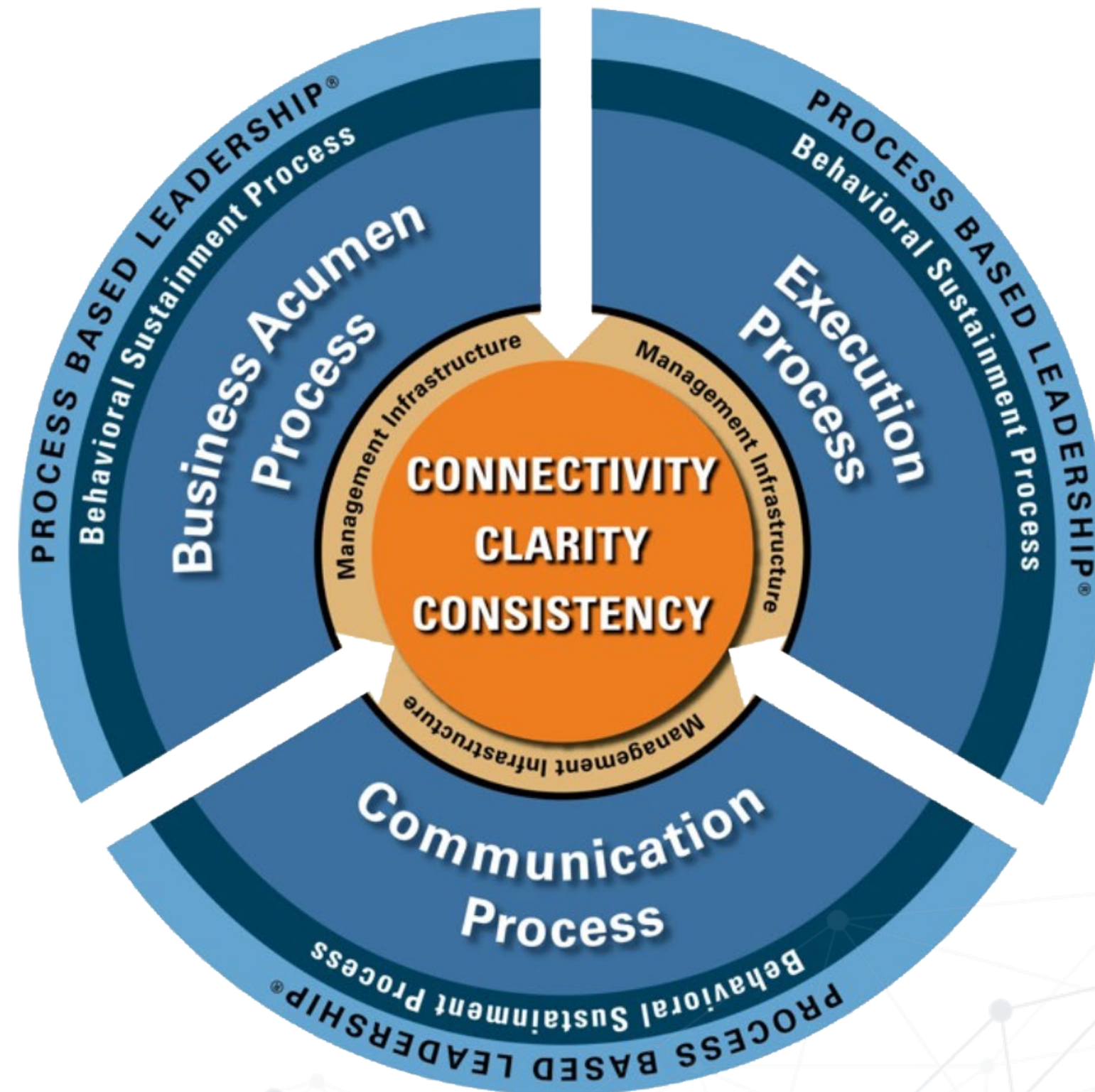
Driving a System/Process

Mindset

1. Business Acumen Process
2. Execution Process
3. Communication Process
4. Ideal Behavior Process

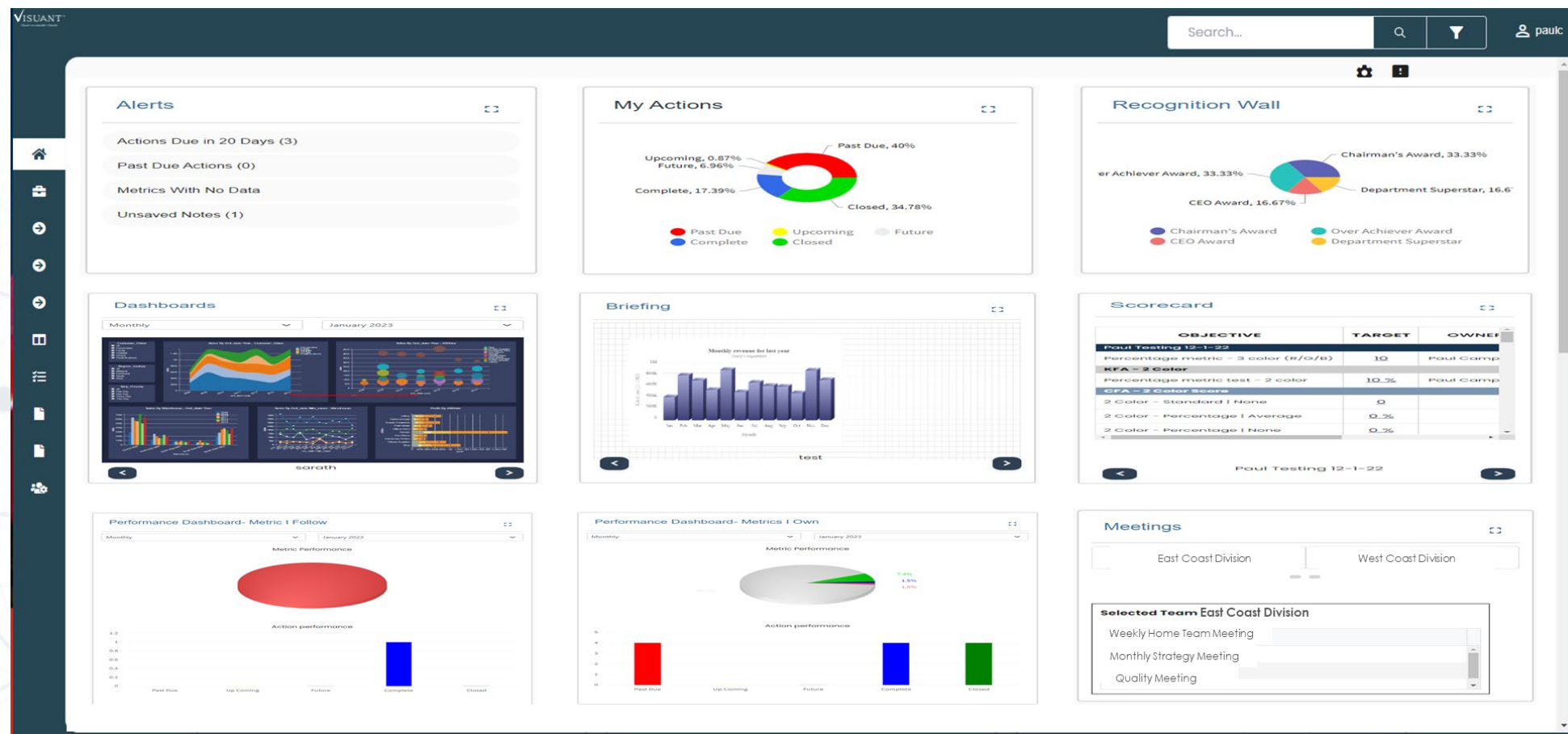
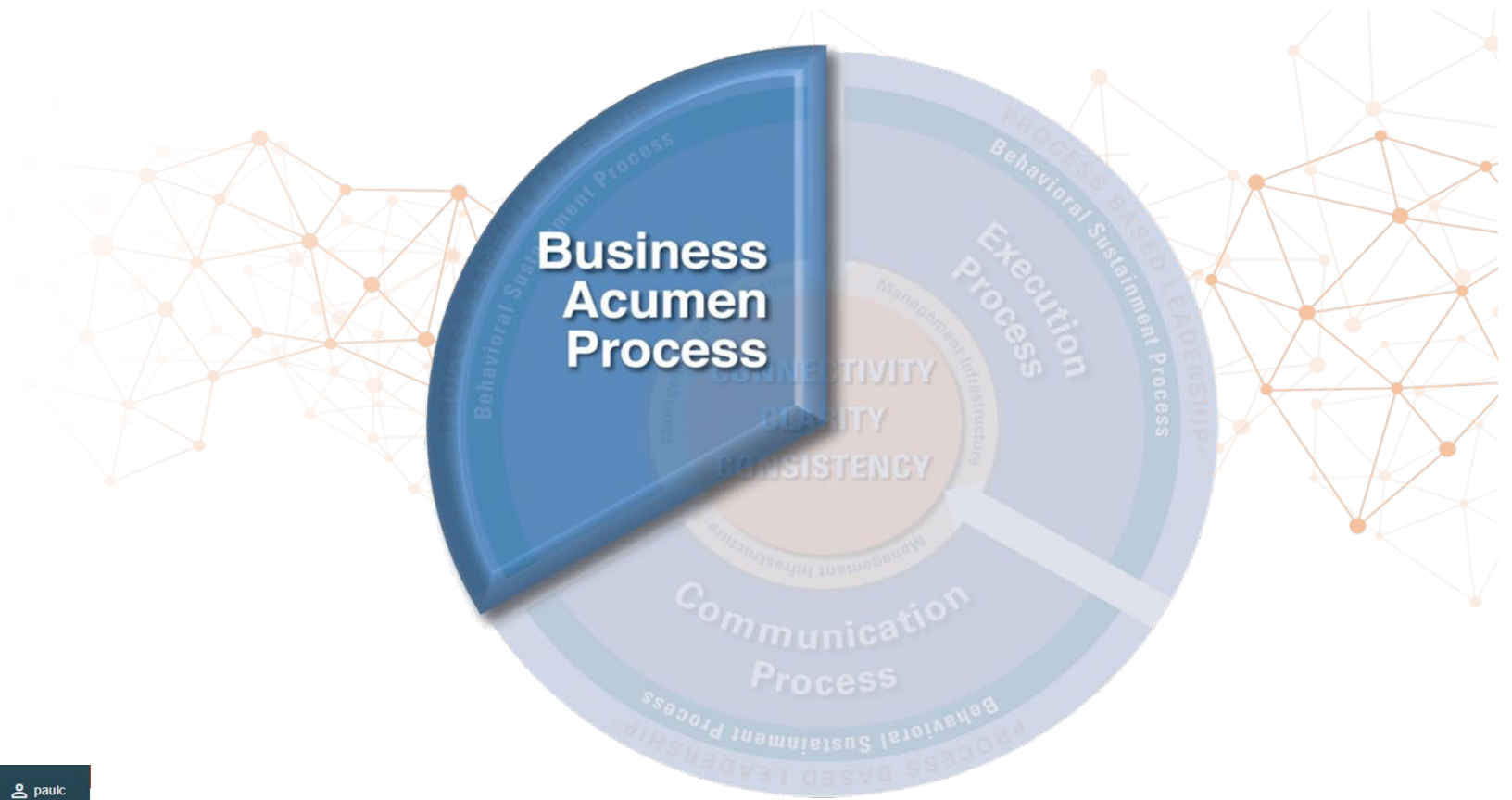
Key – Promotes Sustainability, Leaving a Leadership Legacy, & Making Metrics Matter

It's **NOT** about the **DATA**, it's about the **SYSTEM OF USE...**



Setting the Foundation

- Don't work in a vacuum
 - Bring the team together when defining measures. This builds trust and ownership.
- Break down the siloes
 - Socialize and align measures across the organization.



Low Functioning Team	High Functioning Team
Visualization	Utilization
Thermometers	Thermostats
Explanation	Execution

Tier Management System

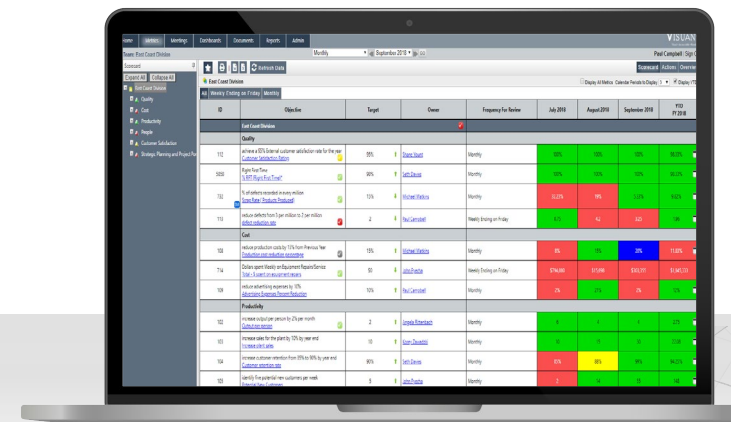
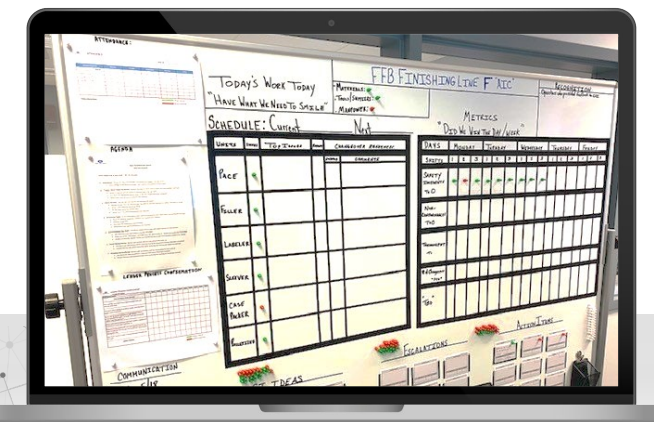
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SHIFT  WEEK

TRANSACTIONAL DAILY MANAGEMENT SYSTEM

TRANSFORMATIONAL MANAGEMENT

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Low tech/high touch metrics

Thermostatic metrics
high tech/low touch

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EDUCATE

Definition of “*What matters most?*”

Identification of Compelling Business Needs (CBN) – Critical Few

Safety

Quality

Cost

People

What does “Winning” look like in our organization?



FACILITATE

Business scorecards are deployed in every meeting as the primary agenda driver

Performance is color coded, **Red**/**Green**

Visual so that it sets the tone. Are we “*winning or losing?*”



MOTIVATE

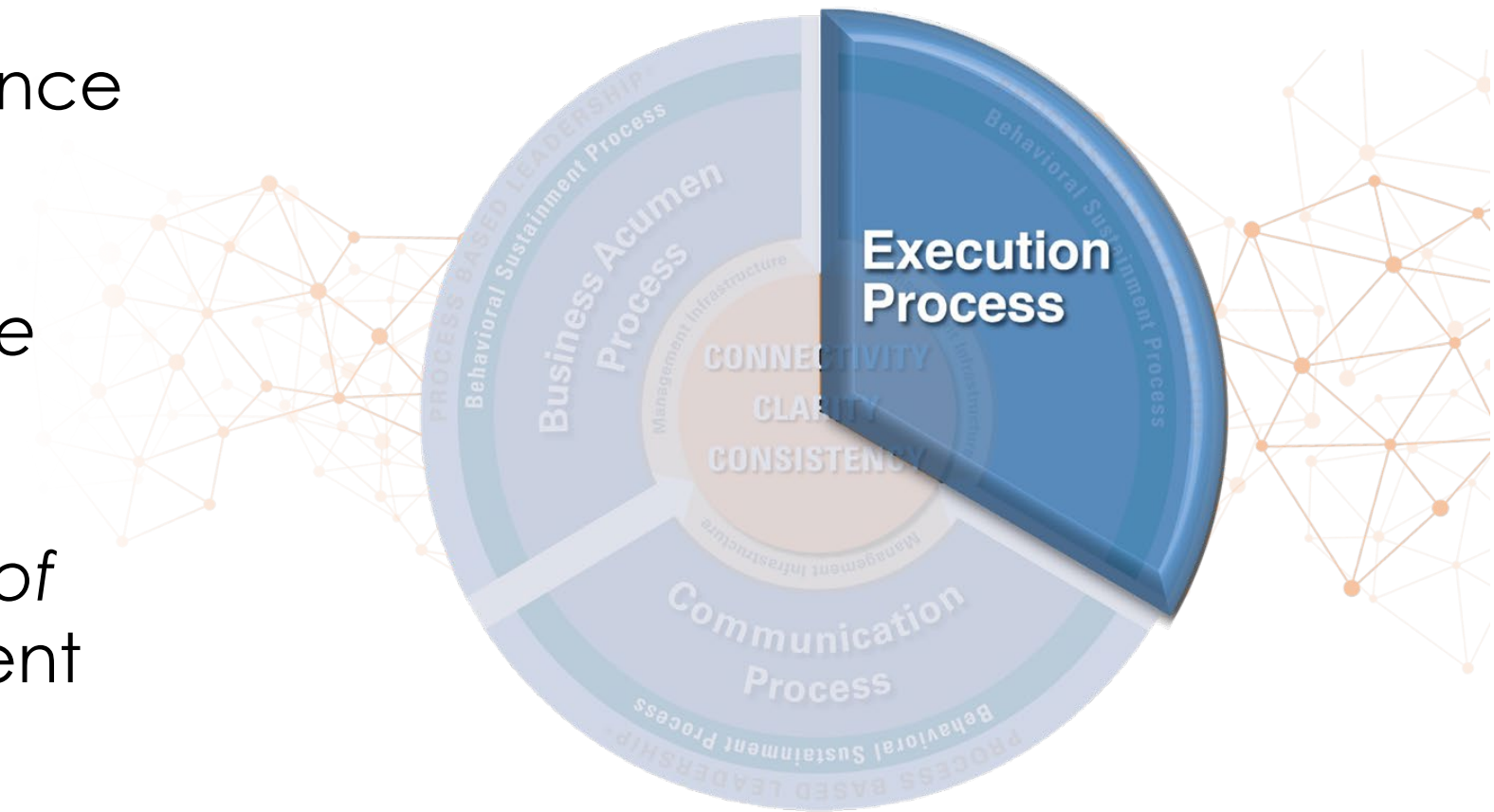
Team members utilize an action register to address scorecard performance issues/accomplishments

Red = corrective action
Green for 90 days = metric review

Metric Iteration formally conducted every 90 Days

Setting the Foundation

- “Selective Engagement” powering the performance of most teams
- Accountability is often measured by “How people Feel”
- The biggest demotivator in teams is the disparity of engagement – no means to measure engagement



ID	PRIORITY	DESCRIPTION	APPLIES TO	RESPONSIBILITY	ORIGINAL TARGET DATE	CURRENT TARGET DATE	# OF EXTENSIONS	COMPLETION DATE	COMMENTS	ADMINISTRATION
1904	Medium	ER2390 - Review Project	KFA - 2 Color	Paul Campbell	Dec 29, 2022	Dec 31, 2022 Add to Outlook.com	1	Feb 13, 2023 Approve Reject	Comments	+ ✎ 🔄 🗑️
1916	Medium	Review RFT Metric across the other 14 sites	Paul Testing 12-1-22	Paul Campbell	Jan 3, 2023	Jan 6, 2023 Add to Outlook.com	1	Feb 14, 2023 Approve Reject	Comments	+ ✎ 🔄 🗑️
1875	Medium	Perform initial review for Knoxville & Virginia Beach additions	KFA - 2 Color	Paul Campbell	Dec 20, 2022	Feb 9, 2023 Add to Outlook.com	2	Mark as Complete	Comments	+ ✎ 🔄 🗑️
2010	Medium	Create new hire orientation presentation for use during onboarding sessions.	Paul Testing 12-1-22	Paul Campbell	Feb 10, 2023	Feb 10, 2023 Add to Outlook.com		Mark as Complete	Comments	+ ✎ 🔄 🗑️
1902	Medium	Two customers unhappy due to delayed shipment arrivals, seeking to find new carrier	Test ≥ or 5	Paul Campbell	Dec 28, 2022	Feb 22, 2023 Add to Outlook.com	3	Mark as Complete	Comments	+ ✎ 🔄 🗑️
2005	Medium	Review New Technology for Servers 1 & 5	Paul Testing 12-1-22	Paul Campbell	Feb 3, 2023	Feb 23, 2023 Add to Outlook.com	1	Mark as Complete	Comments	+ ✎ 🔄 🗑️

1. Accountability should be Visible, Personal, and Measurable
2. Change the Narrative – “What have you done to move the business forward?”

Accountability Visualization – Manifestation of Execution:

Bolt-On Mentality to Metric
Performance

Move from a culture of
dependency to
accountability

Scorecard “Bolt-on” – Thermostatic Application:

Any RED/under-
performing metric must
have a documented
corrective action

Actions captured with
12-month clarity

Any action in jeopardy
must be renegotiated
with the team leader 48
hours in advance of the
due date

Performance Management:

Engagement Analysis – Every 90
Days

Performance Management:
Data=Dialog=Development

“How have you personally
moved the business forward?”

Setting the Foundation



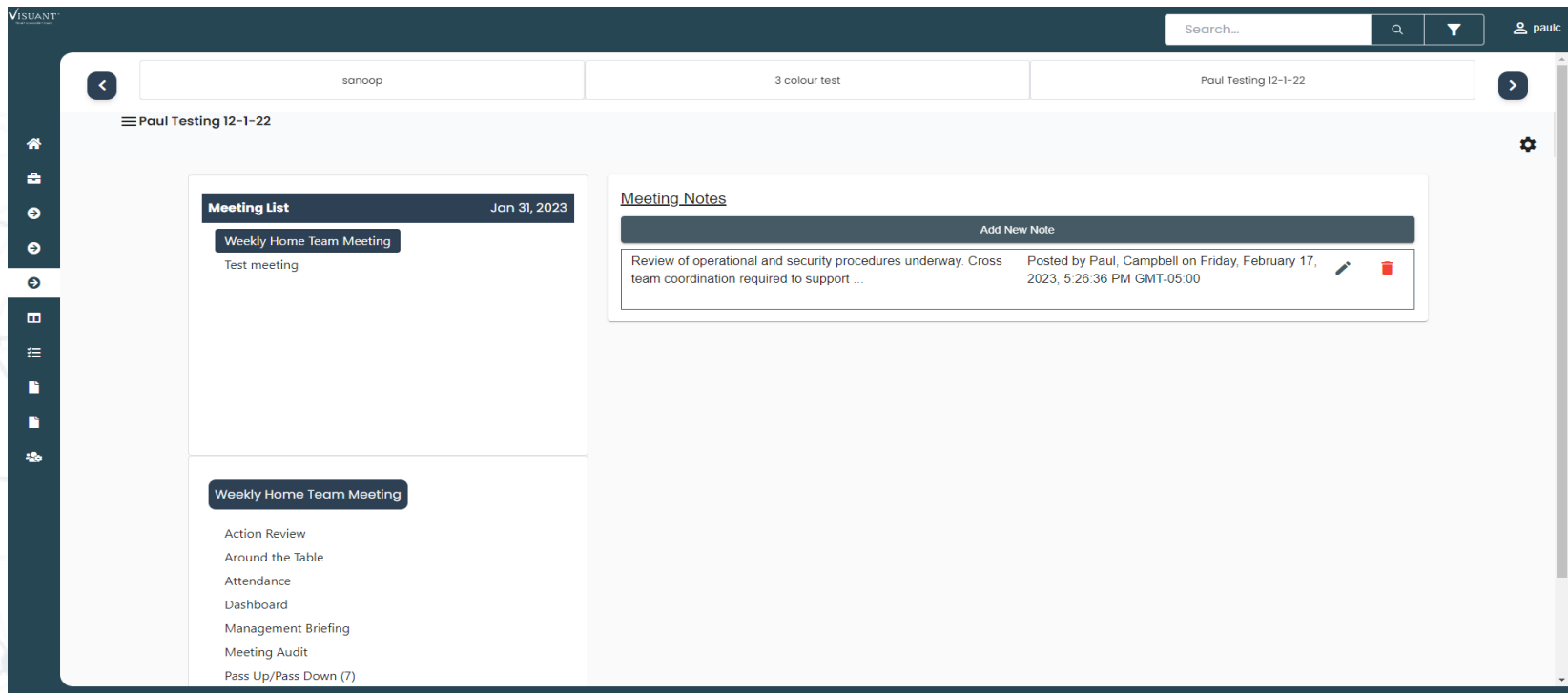
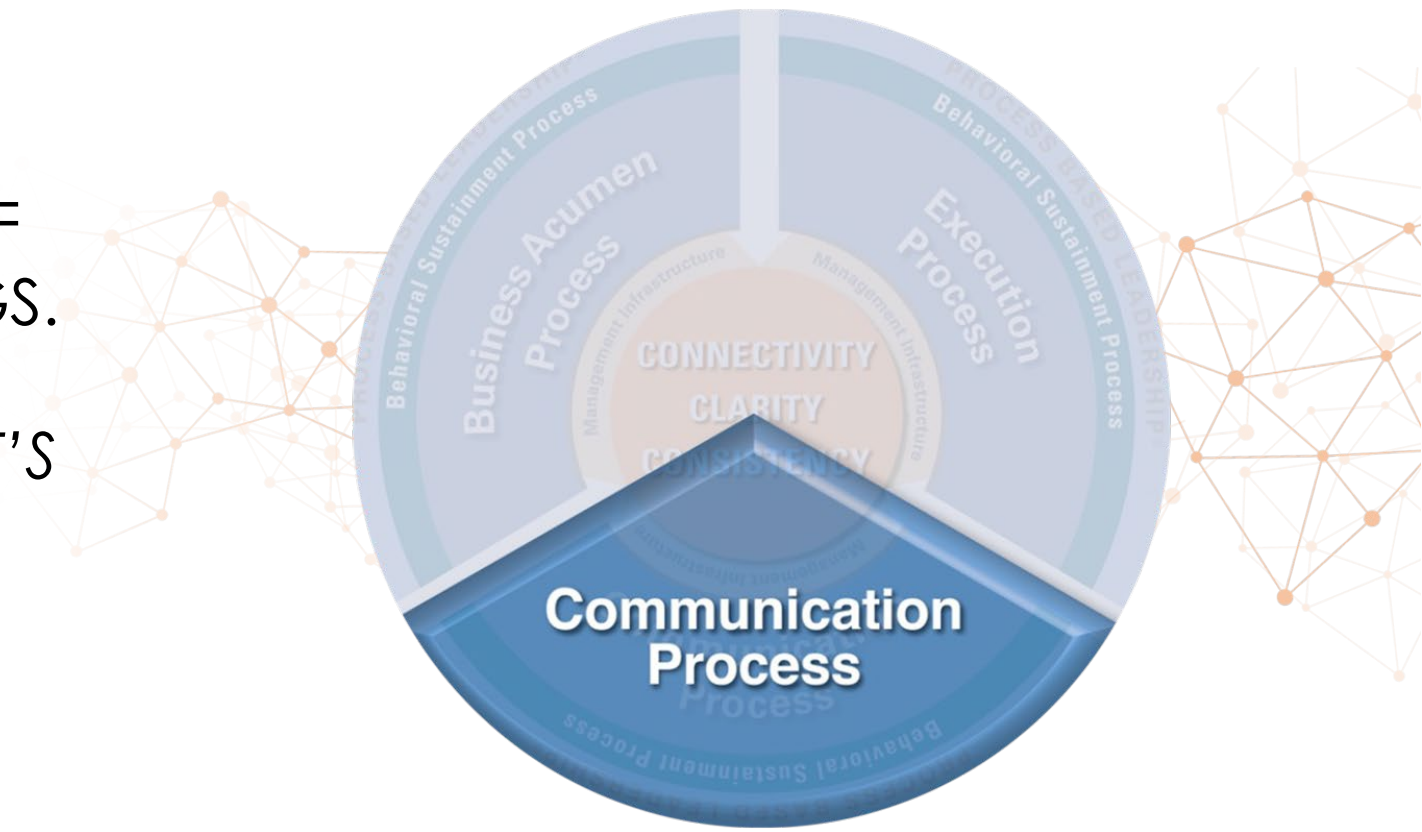
MEETINGS FEEL LIKE AN "IN ADDITION TO" THE WORK



PERSONALITIES DRIVE MEETING EFFECTIVENESS



LEADERS SPEND 78% OF THEIR WEEK IN MEETINGS. IN THE ABSENCE OF A GOOD PROCESS – "LET'S CALL A MEETING..."



THERMOSTATIC METRICS POWER THE MEETING – "DID WE MOVE THE BUSINESS FORWARD?"



STANDARDIZED AGENDAS DRIVE CONSISTENCY AND ROBUST CASCADE OF INFORMATION



MEETINGS ARE FOCUSED TO PROVIDE TIMELY INFORMATION "ENABLER OF WORK"



1 Action register review
(actions due this communication cycle)

2 Scorecard review
(only red items)

3 Around the table
(60 seconds per participant, future focused, no problem solving)

4 Recognition
(intentional reflection)

5 Pass down/up/to process
(creating an offensive position)

6 Action register review
(new actions – 12-month clarity)

7 Meeting audit
(did the time we just spend move the business forward?)



ROBUST RHYTHM & CADENCE OF COMMUNICATION



- tier 6 **Executive Team – Monday 1pm**
- tier 5 **Vice President North American Operations Leadership Team – Tuesday 9am**
- tier 4 **Plant Leadership Team – Tuesday 1pm**
- tier 3 **Department Managers – Wednesday 9am**
- tier 2 **Supervisors – Wednesday 1pm**
- tier 1 **Operators – Thursday-Friday 12pm**

PROCESS CONFIRMATION / SYSTEM VALIDATION – AFTER HOURS

STOP VISUALIZING AND START UTILIZING:

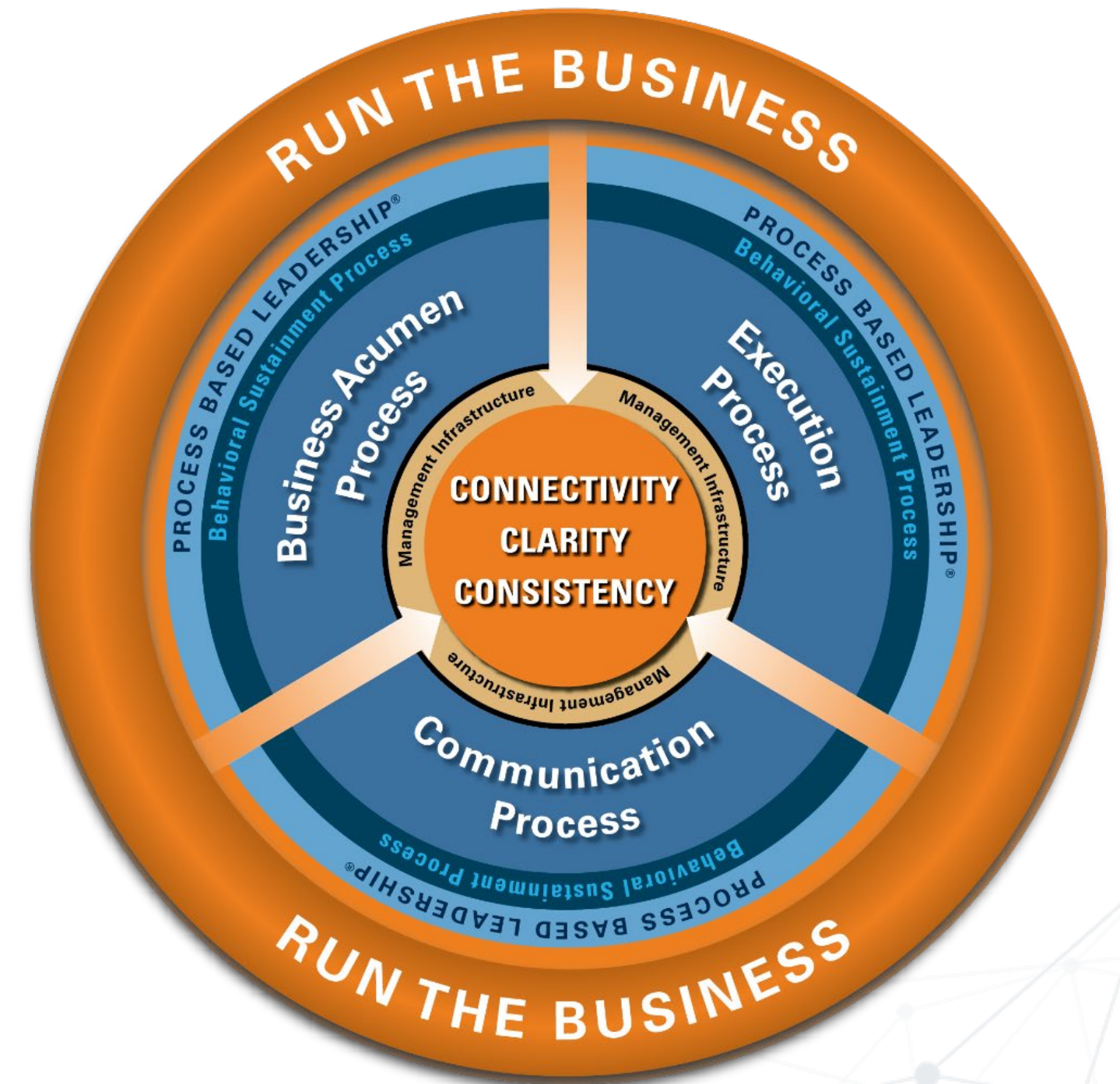
Thermostatic metrics iterated every 90 days to drive winning or losing mindset

Bolt-on execution process to elevate expectations of engagement through collective accountability

Disciplined cadence of communication putting leaders on offense

Definition of ideal behaviors required to drive ideal results

Robust on-boarding system “Welcome to our team! This is how we do business.”



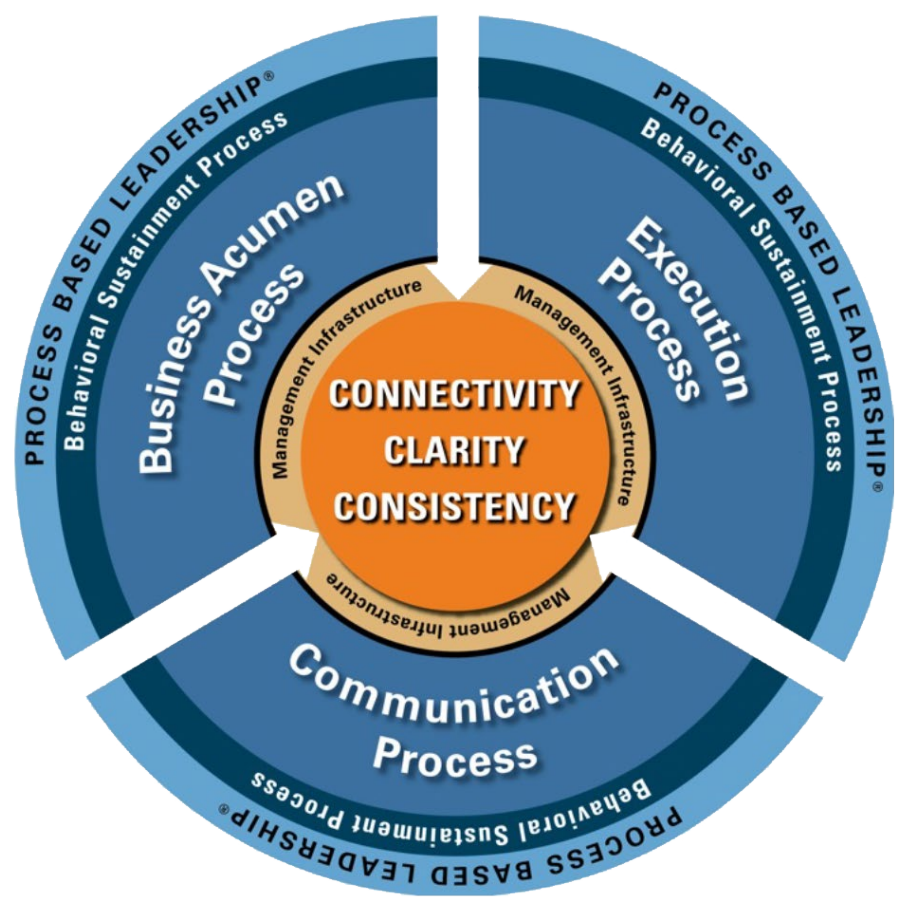
High functioning leaders create the non-negotiable architecture to dynamically “RUN THE BUSINESS”

“Optimizing People, Processes, & Performance”

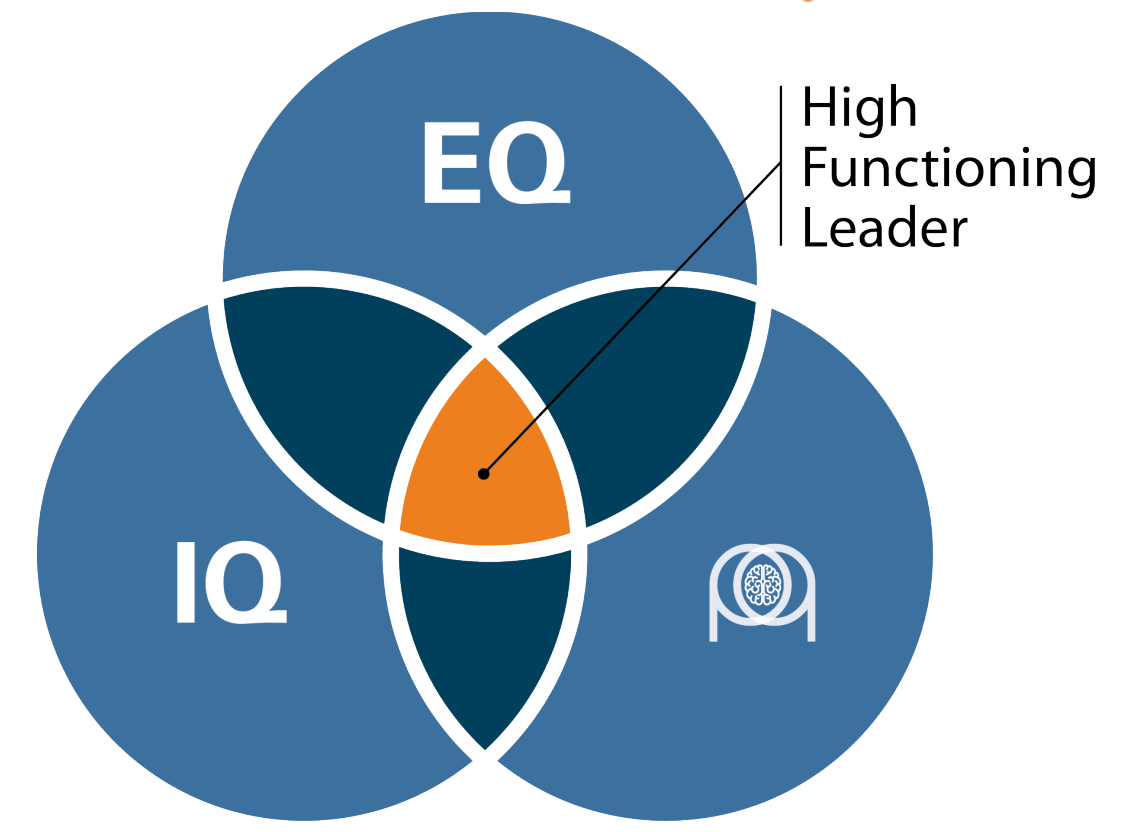
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LEADERSHIP  GPS





PAUL CAMPBELL, EXECUTIVE VICE PRESIDENT

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 **Competitive Solutions Inc.**

SCAN FOR MORE INFO



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Panelist Questions and Discussion



Paul Campbell
Executive Vice President
Competitive Solutions, Inc.



Jerry Rees
Chief Operating Officer
Baldrige Foundation
(Moderator)



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