Results by MassIngenuity®

Enterprise Performance Management: Transforming Ideas Into Action

Enterprise Performance Management

Washington Lean Conference October 2023

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About the California Department of General Services

Mission
Deliver results by providing timely, cost-effective services and products that support our customers, while protecting the interests of the state of California.

Vision
Excellence in the business of government. We strive to achieve excellence by providing our customers with the products and services they need in a professional, value-added way.

Values
At DGS, we have a set of core values that provide an important foundation for how we conduct ourselves and our business.

About Mass Ingenuity

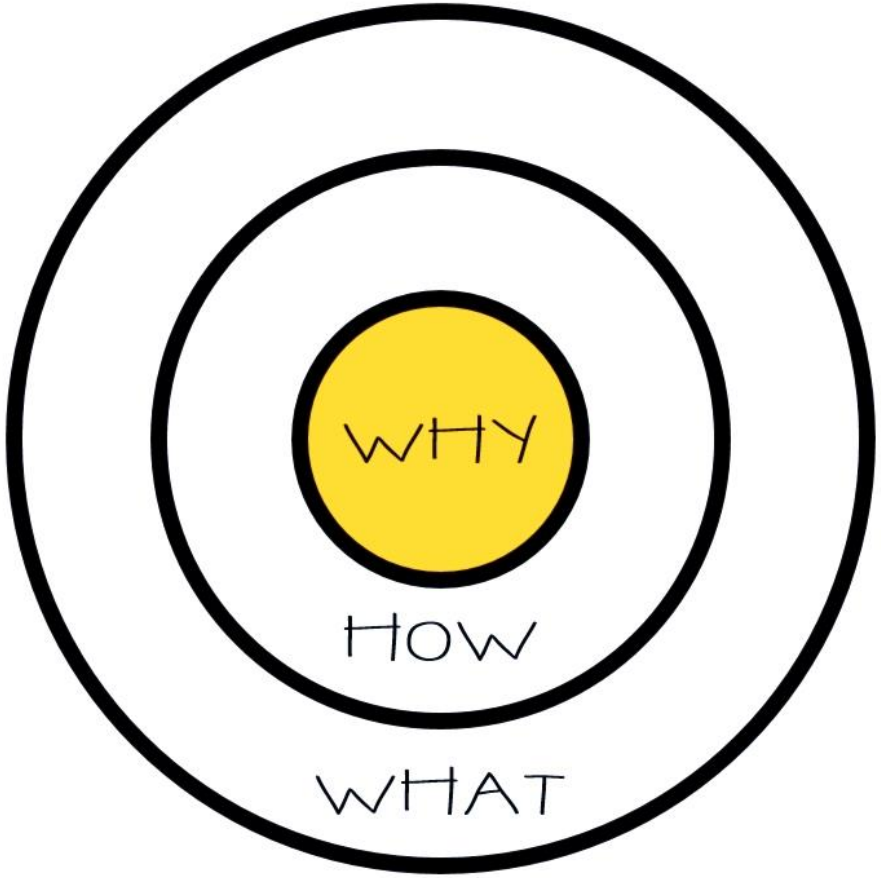
- Pacific Northwest-based company founded in 2010
- SaaS-based enterprise performance management software and consulting services for strategy-to-execution excellence
- Integrates organization development, lean process improvement, strategic planning, change management, and data-driven decisions
- Serves state government agencies including human services, health care, corrections, fish and wildlife, regulatory agencies, and governor's transformation offices
- Deployed in 80 organizations in Washington, Oregon, California, Arizona, New Mexico, and Pennsylvania
- Creates value in under 90 days with an ROI consistently in excess of 10:1

Themes for Today

1. **Why** Enterprise Performance Management matters

2. **How** do we create a transformation

3. **What** can we expect for results



Let's "Double Click" on Those Themes

Deep Dive on "Why" Enterprise Performance Management Matters

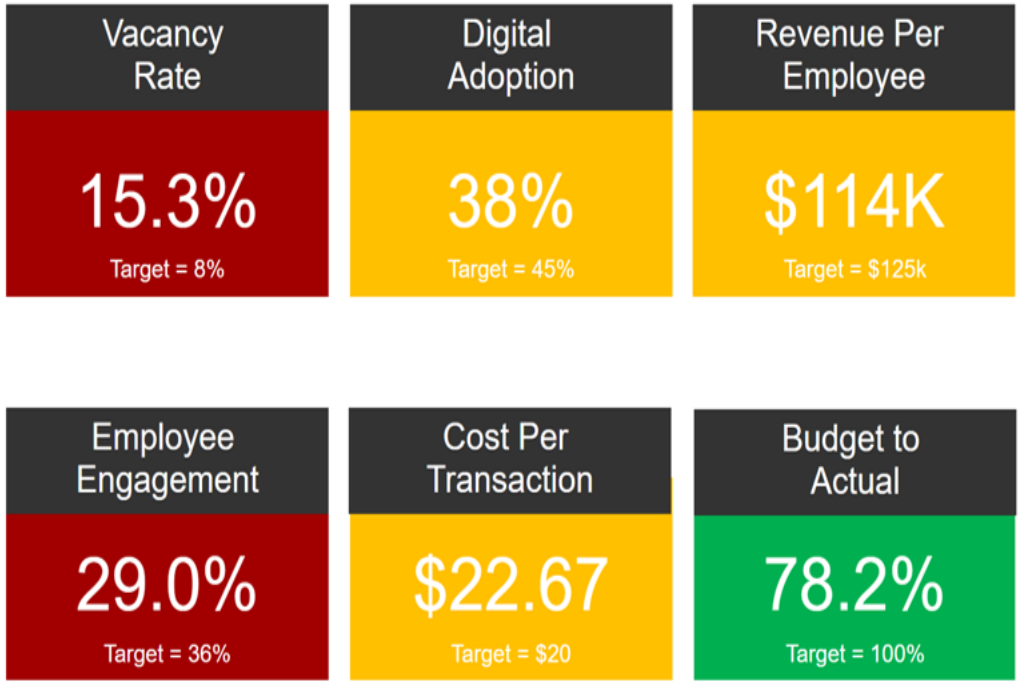
What If?

- What if enterprise performance management unlocks the human potential and enables performance?
- What if you could storyboard your team's performance on one-page to highlight achievements?
- What if you could have real-time performance information at your fingertips?
- What if enterprise performance management transforms ideas into action?

If you can, just imagine the opportunities that could be created to improve your results

Why Enterprise Performance Management Matters

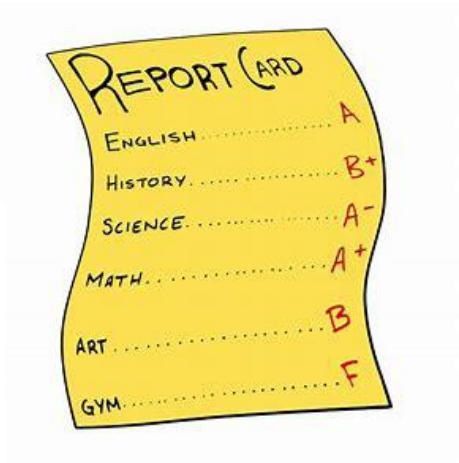
- Citizens expect a much higher level of services from government
- Enterprise performance in government has become mission critical
- The new workforce expects to use data driven insights to drive decisions
- Every agency domain is challenged to improve customer experience
- The workforce will remain hybrid
- Governors are demanding a focus on KPIs, OKRs, and customer service

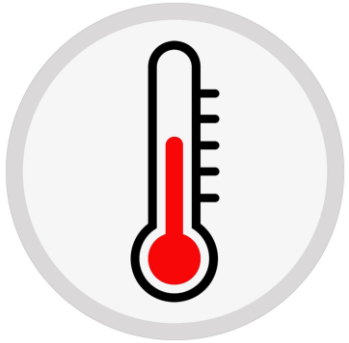


Why Enterprise Performance Management Is Powerful

- **Optimize your agency's mission through the "strategy to execution journey"**
  - By seamlessly providing visibility, transparency, accountability, and management best practices
- **Integration of people, process, and technology**
- **People:** Change management, group facilitation, leadership development, coaching, inclusion of multiple stakeholders, and engagement of diverse points of view
- **Process:** Macro- and micro-level process improvement; start at executive level and cascading to frontline processes, including performance measures and measure owners
- **Technology:** Manage and connect with performance data from multiple sources; provide visual analytics and reports; seamlessly connect people and processes

We Love to Measure Stuff!





"If you can't measure it, you can't manage it." – **Peter Drucker**

The Power of Why

To Transform and Innovate

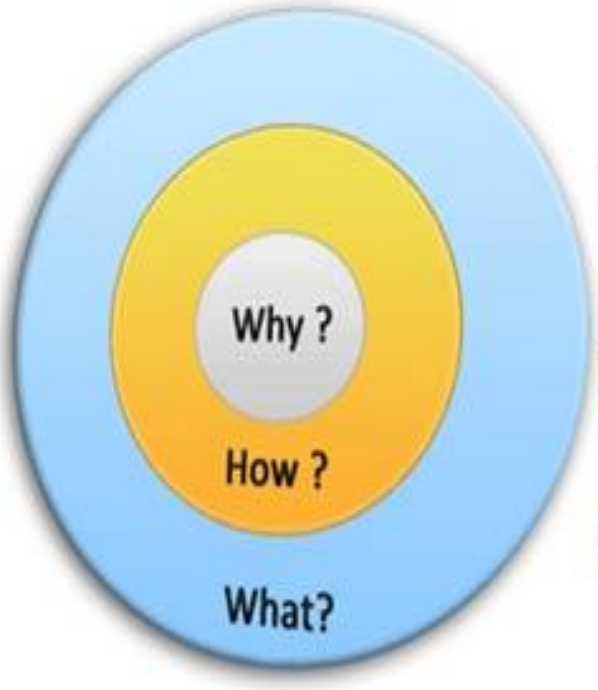
California Lean Journey

Civil Service Improvement

- 2015 Statewide Initiative
- Talent Management
  - Staff Development
  - Leadership Development
- Performance Improvement
  - Lean Academy
    - Orientation
    - T4T
    - Project Leader

Leading Through the Power Why

Performance Leadership



Why = The Purpose

What is your cause? What do you believe?

How = The Process

Specific actions taken to realize the Why.

What = The Result

What do you do? The result of Why. Proof.

Performance Management

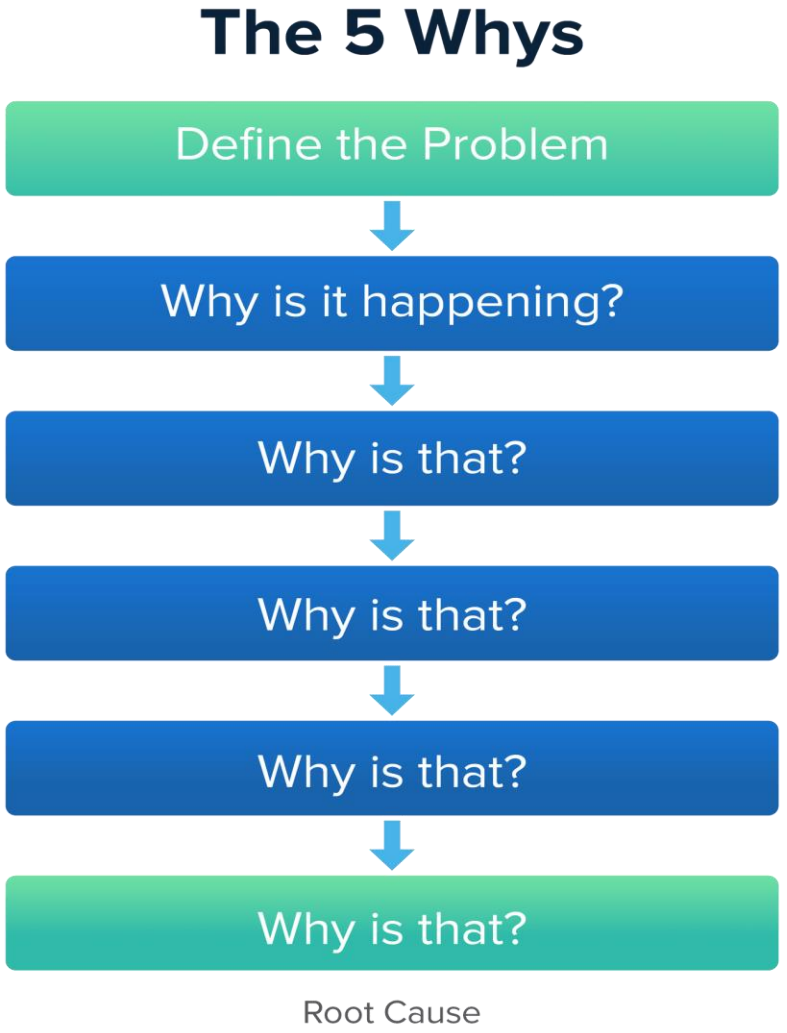
- Why implement Lean?
- Why focus on process?
- Why engage staff in first level problem solving?
- Why utilize proven tools to improve and innovate?
- Why utilize 5 Why's?

If you cannot flow it, you do not know it!

5 Why's & Problem Solving

Why Utilize the 5 Why's

- Identify the root cause, not just the symptoms
- Perform evidence-based analysis
- Invite improvements from those closest to the work
- Build a culture that embraces innovation and develop problem solvers

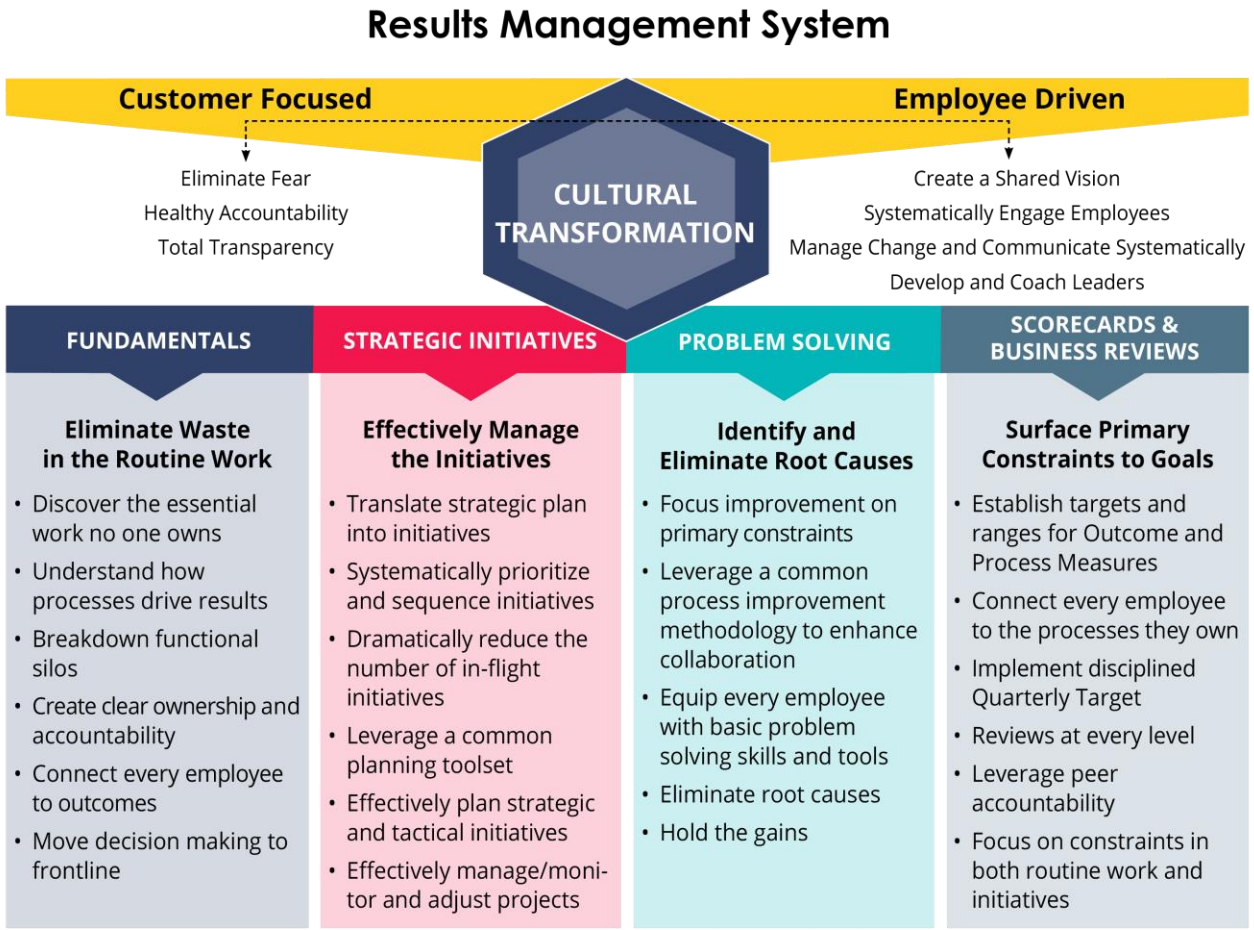


Leading With Lean

Let's Explore "How" We Implement EPM

How to Create an EPM Transformation

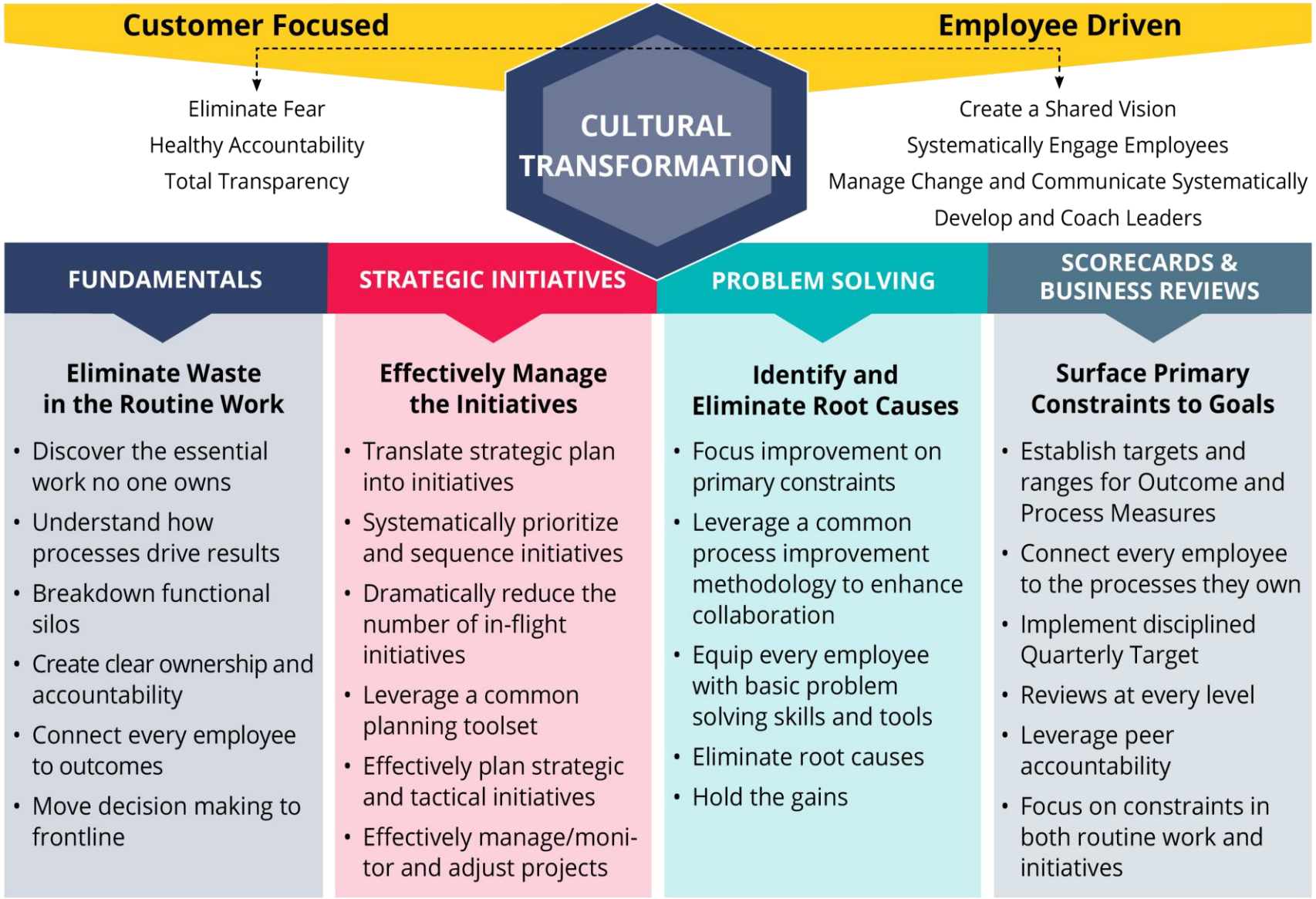
- Establish a clear "Why" and path forward
- Manage the transformation from ad hoc to insightful use of data
- Meet people where they are at and grow through change management
- Confirm clear and committed sponsorship
- Assess current state and identify gaps
- Create an environment of trust and transparency
- Create a governance structure to lead, grow, manage, and monitor
- Focus on integrating management of daily operations (fundamentals) with strategy deployment



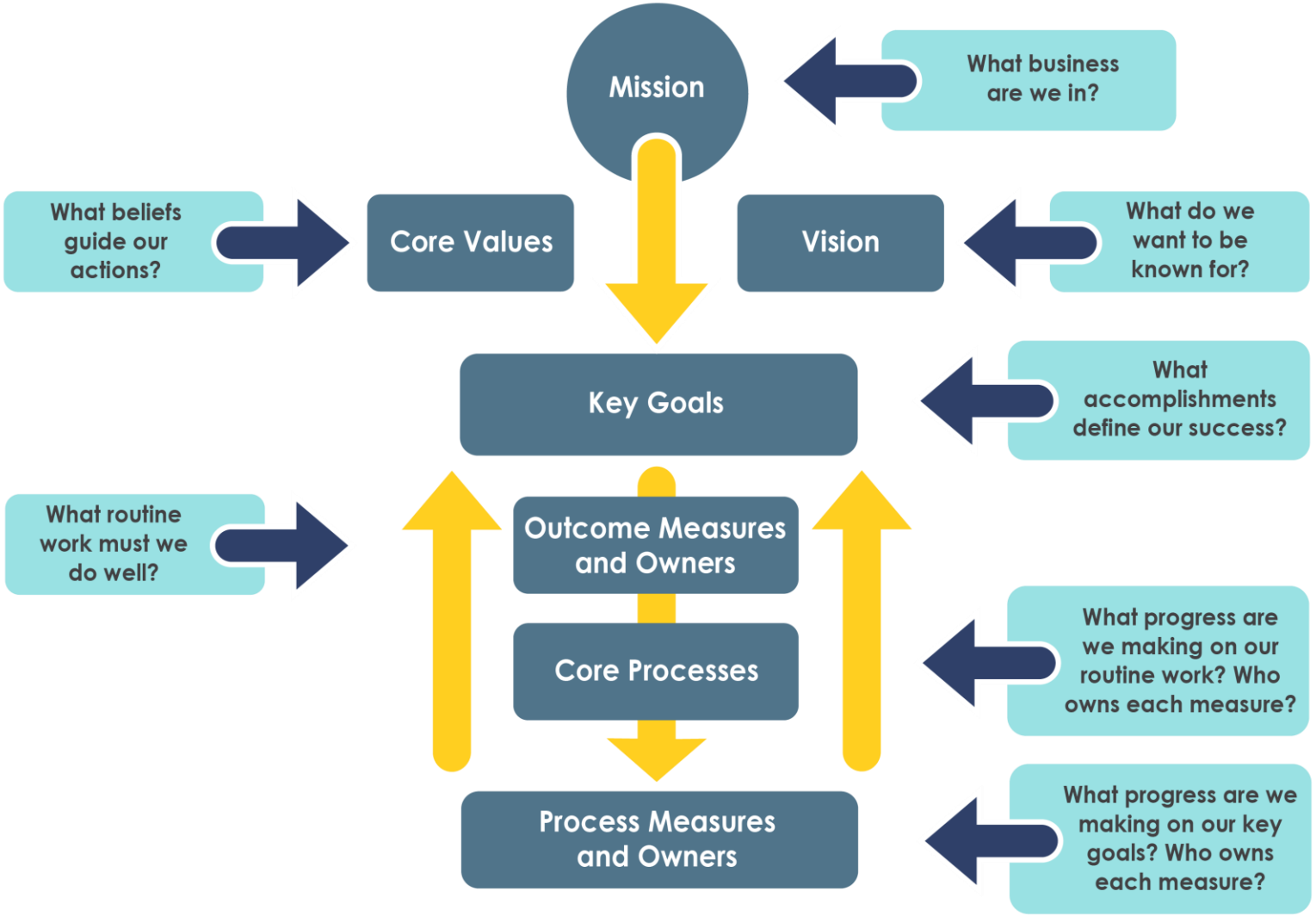
Quick Tour of an EPM System

- **Primary Features**
  - Maps
  - Groups
  - Projects
  - Tools
- **Dashboards**
  - Fundamentals Map
  - Business Reviews
  - Custom Reports
  - Storyboards

Results Management System



Fundamentals Map Components

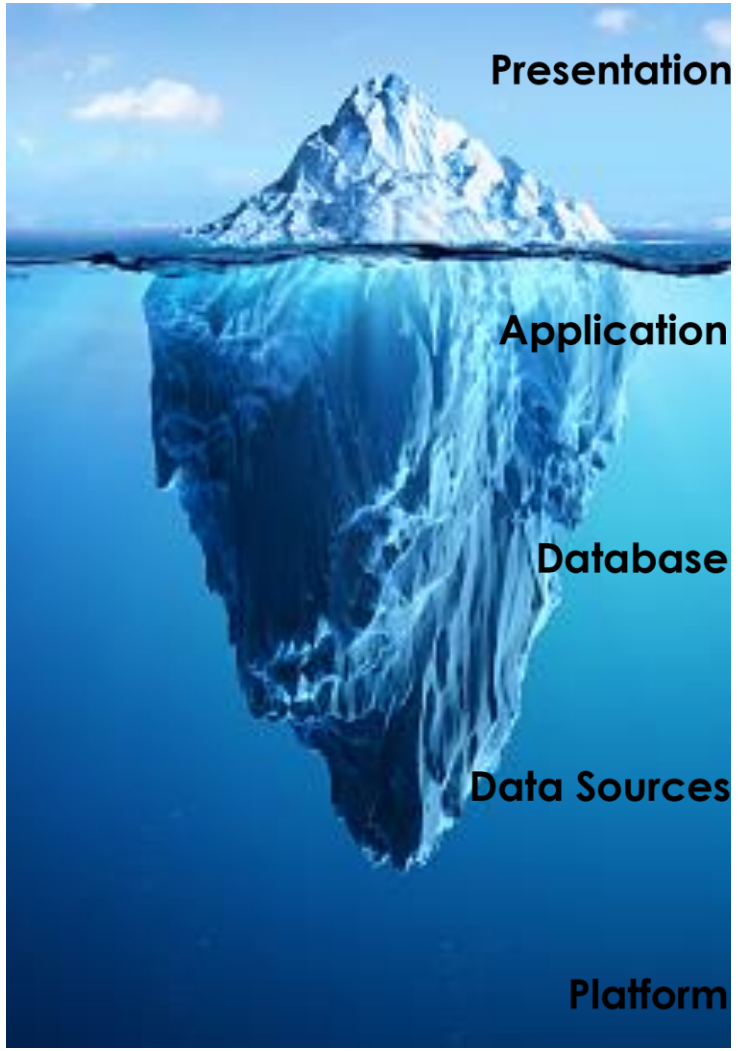


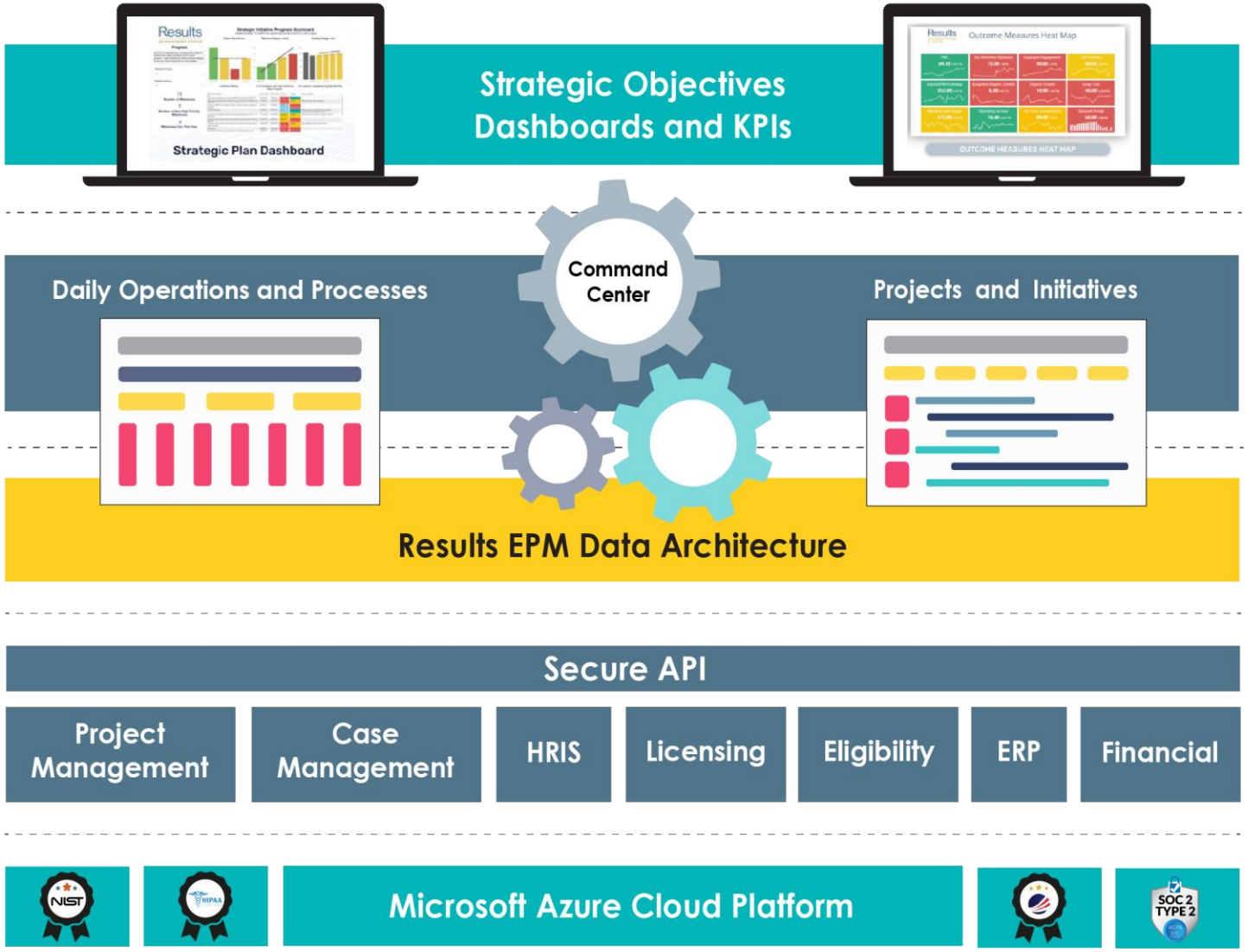
Developing Operational Excellence and Performance Measurement Owners

(Coming up you will see how the Fundamentals Map Measures are managed in Results Software)

Results Software Technology Stack

Power BI, Tableau, and Other Visual Tools are "Above the Water Line"





Quick Review - Basic Types of Business Reviews

Monthly

- Shorter duration (90 mins)
- Narrower focus on Key Performance Measures and Projects
- Deeper dive on 2-3 selected processes
- Identify and address key process constraints

Quarterly

- Longer duration (typically 2-3 hours)
- Broader focus on all Process and Outcome Measures
- Includes progress report on strategic initiatives
- Identify organizational constraints, allocate resources to high priority corrective actions

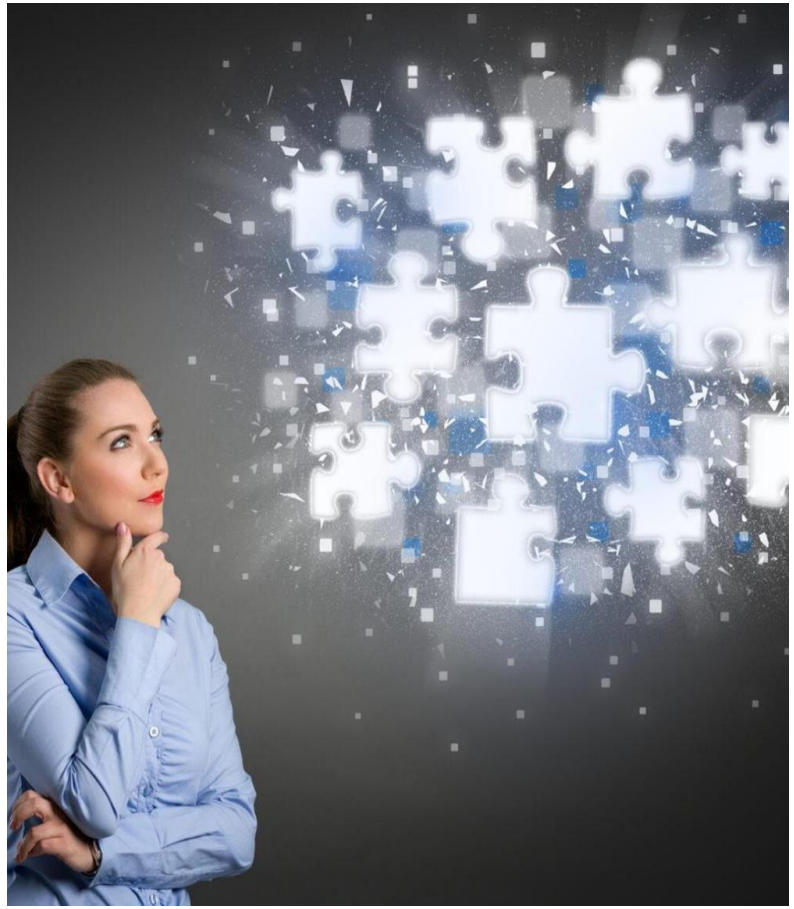
"Results, Results, Results!"

What Can We Expect in Terms of Results

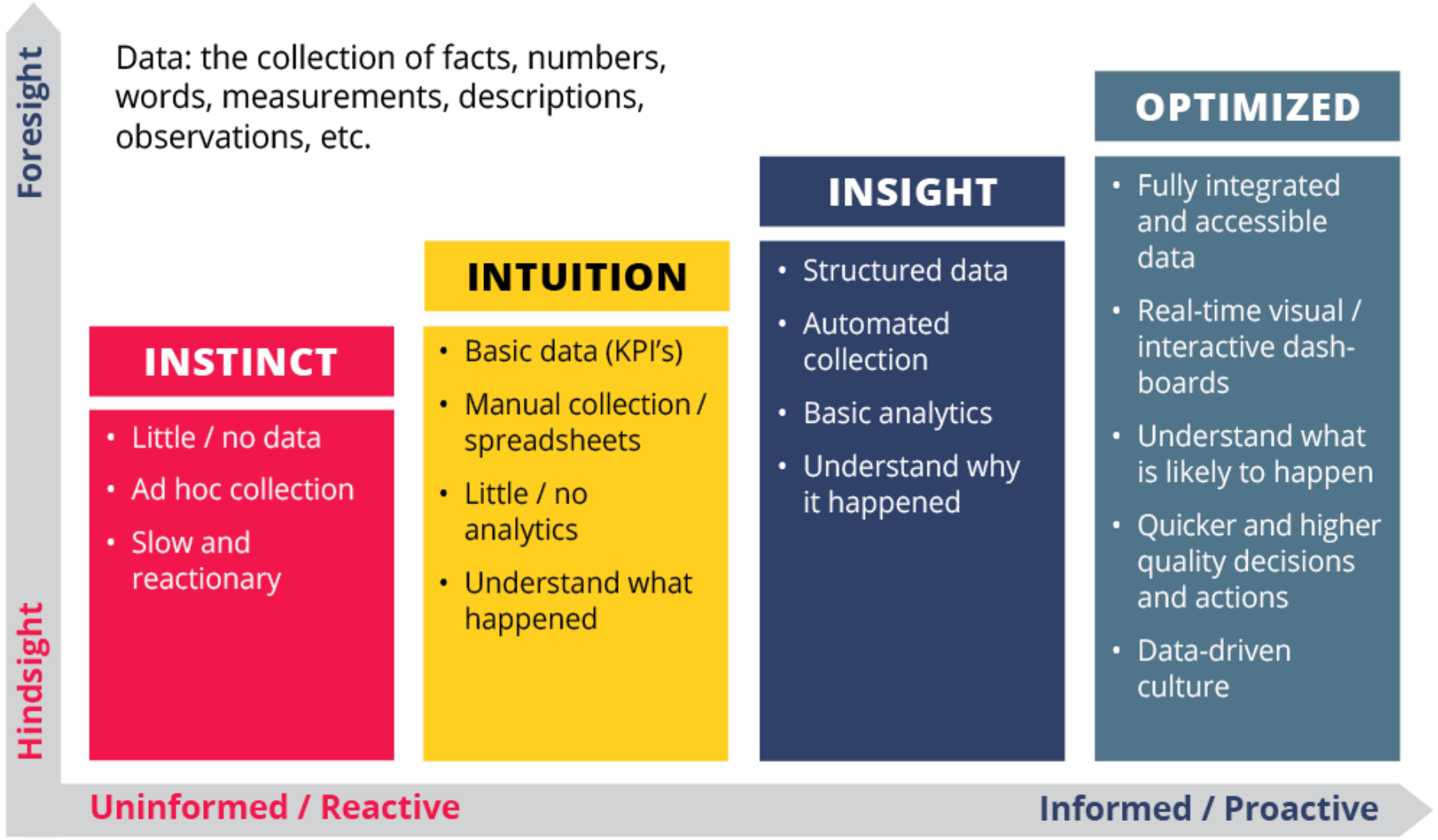
- Well coordinated individual and team efforts
- Increased customer satisfaction
- Improved communication between management and staff
- Increased employee engagement
- CX + EX = TX
- Optimized performance results

Results EPM Achieves

- Operational and strategic excellence
- Significantly greater visibility and management of initiatives
- Improved customer and financial outcomes
- Alignment of people about what matters most
- Greater clarity about roles, ownership, accountability, and inter-agency collaboration
- Improved resource utilization
- Increased employee engagement, productivity, and innovation
- Reduced process waste and costs
- Improved customer experience and satisfaction
- Real-time visibility to enterprise performance measures, data, and visual analytics
- Technology as a single source of EPM data



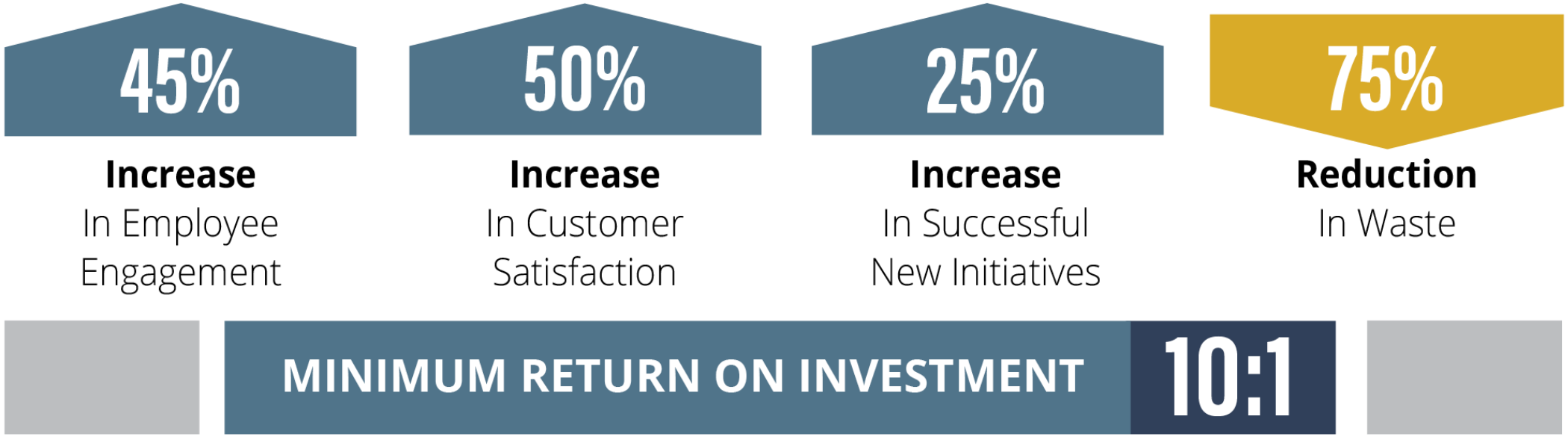
Data Maturity: From Instinct to Optimized



"Are you data rich or knowledge rich?"

Typical EPM Customer Results

The Results Management System and Software delivers tangible paybacks.



Transforming Ideas into Action

Start Your EPM Journey Now!

Appendix

- EPM clients in their own words
- Corrections Officer II video
- Sample dashboards

Dwight Cloud

Chief Information Officer
Arizona Department of Corrections (retired)

"We have a lot of enterprise software applications running in our organization. Most have been difficult to learn and use. Results Software was easy to learn and intuitive to use. The training sessions were well organized and used our time efficiently. Results Software is an excellent technology match for our management system and our performance management initiatives."

Cathy Iles

Performance System Administrator
Oregon Department of Human Services

"Throughout the process of implementing RESULTS, Mass Ingenuity has been exceptionally helpful, supportive, and responsive. I appreciate that client input is welcomed as the software is continually developed. You have all been fabulous partners who are willing to sit down with us, hear our needs, and help us use the software to meet those needs in the most effective way."

Richard Jones

VP IS Governance and Infrastructure
Wawanesa Mutual Insurance

"Results Software provides a valuable tool to connect our entire IS leadership team to these measures to improve transparency, ownership, and accountability across our Canadian and US-based teams. This work has provided a framework to talk about our business in a manner that was not possible previously."

Mass Ingenuity reports a 50% Increase in customer satisfaction after implementation of Results Software.

Arizona Department of Corrections: Director Charles L. Ryan (retired)

"It has been an incredible honor to have been working with Mass Ingenuity during the previous several years. It has been a '2nd to none' learning experience for our team, to include me… Thank you! It has been a privilege working with your organization. ADC is better for it!"

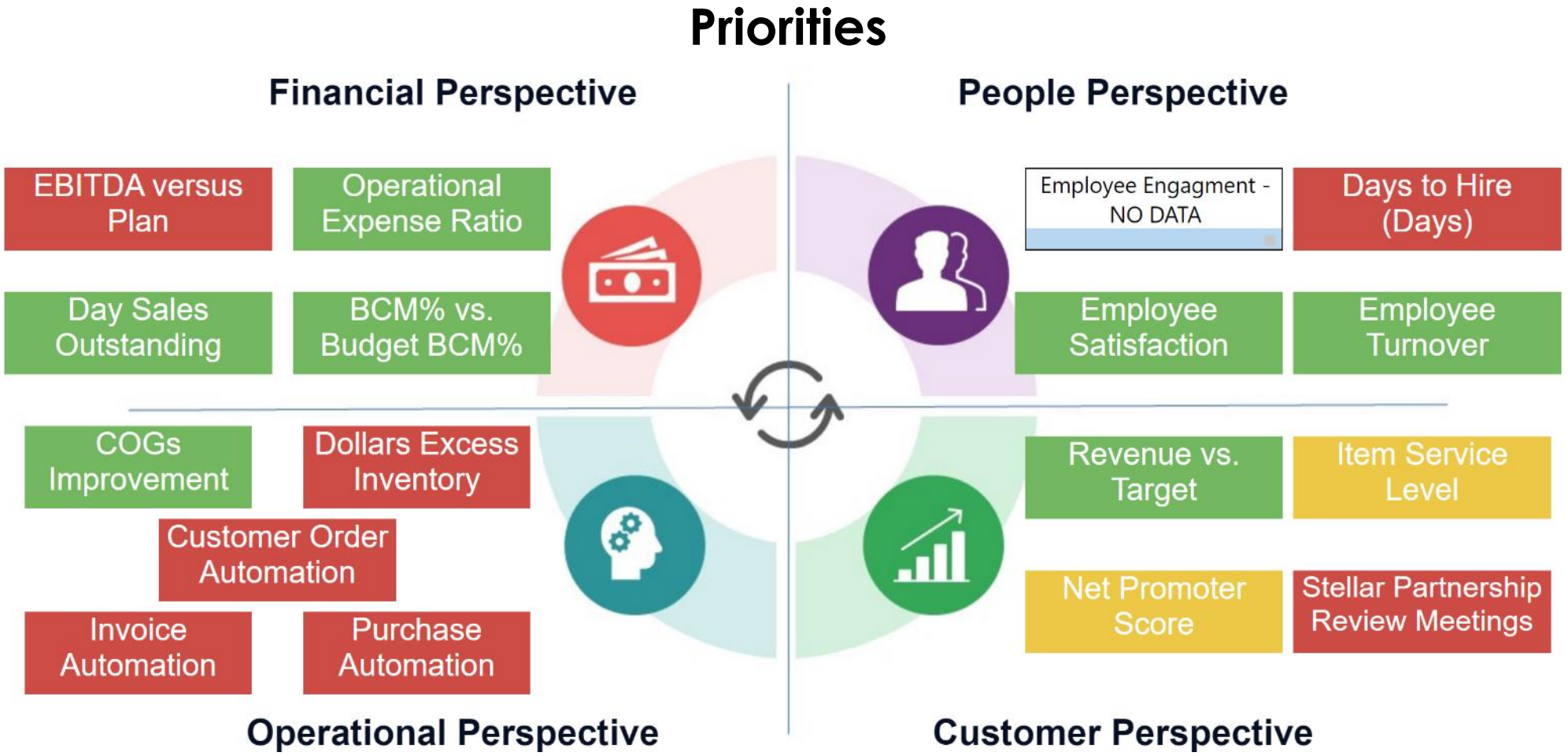
"The journey we have been on is to be in complete alignment with the Governor's Map in the best interests of the citizens of Arizona… We have forged a strong relationship with Mass Ingenuity that has been most worthwhile… I have been in corrections for 40 years and our work [with Mass Ingenuity] is among the most challenging and rewarding work I have personally been involved in. It has made me a better listener, a better leader, and a more efficient steward of our state resources…

Our agency has also implemented Results Software to help us more efficiently manage over 1,000 performance measures and dozens of scorecards down to the prison complex and bureau level. We have implemented Quarterly Strategic Portfolio Reviews. These ensure accountability, transparency, and provide our executive team with the ability to make timely adjustments…"

Frontline Corrections Officer

https://www.youtube.com/watch?v=C2Qgw7IP67I

Balanced Scorecard View of KPIs



DMV FOD KPIs

Legend
Enterprise Level KPIs

Appointment Availability

Driver License
14.9 days
Target = 14 days

Vehicle Registration
6.2 days
Target = 14 days

Commercial DL
18.8 days
Target = 40 days

Drive Test
16.7 days
Target = 14 days

Wait Times

With Appointment
14.8 mins
Target = 15 mins

Without Appointment
31.2 mins
Target = 45 mins

Cycle Times

DL Transactions
7.9 mins
Target = 8 mins

VR Transactions
7.1 mins
Target = 8 mins

Average Transaction
7.6 mins
Target = 8 mins

Team Member Availability

Window Utilization
84.8%
Target = 88%

Customer Satisfaction

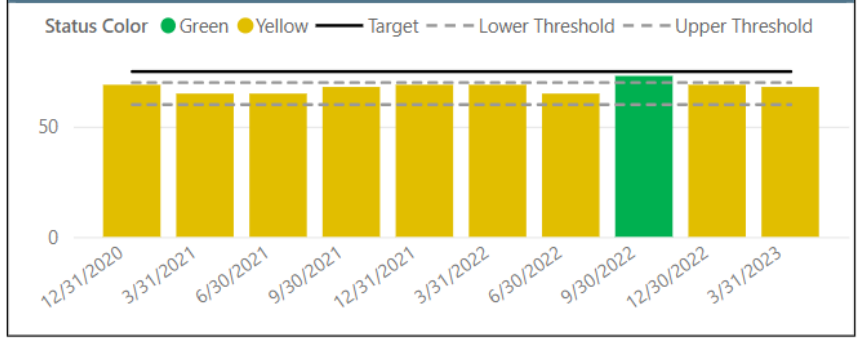
Field Office
4.2
Target = 4.6 out of 5

Customer Satisfaction Comparison

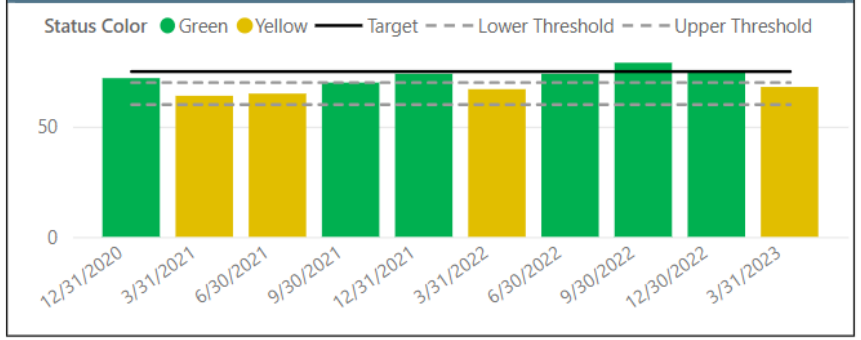
"Overall, I am satisfied with DVR"

1/31/2013 9/30/2023

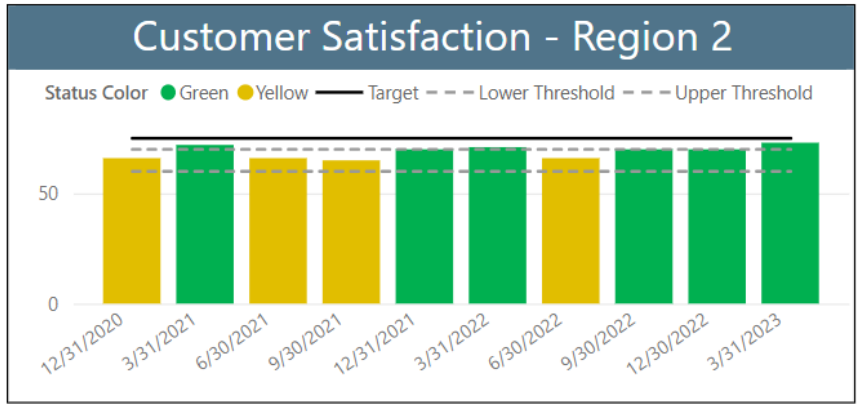
Customer Satisfaction - Statewide



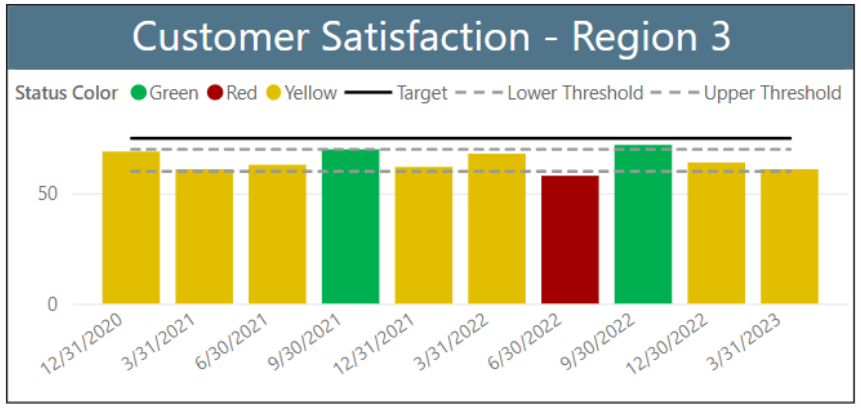
Customer Satisfaction - Region 1



Customer Satisfaction - Region 2



Customer Satisfaction - Region 3



ODFW High Priority Strategic Initiatives

Select the strategy by clicking on the image

Sage Grouse Core Maps and Plan Update
Skyler Vold

Mule Deer Plan Development
Josh Smith

Wolf Plan Review
Derek Broman

Private Forest Accord Grant Program Start Up
Andy Spyrka

Hatchery Resilience Assessment and Development of Recommendations
Scott Patterson

Sage Grouse Core Maps and Plan Update (Phases 2&3)

Description: In February 2022, the Oregon Department of Fish and Wildlife began reviewing and revising Oregon's Sage-Grouse Core and Low-Density habitat designations in conjunction with updating Oregon's Sage-Grouse Conservation Assessment and Strategy. As of February 2023, ODFW has completed Phase 1 of the habitat revision process and is in Phase 2 of this process. Phase 1 was strictly a GIS-based analysis, using the methodology from the original (2011) sage-grouse habitat delineation. Phase 2 in the revision process will identify specific locations where boundary changes to the revised core and low-density habitat designations. Each adjustment made to the revised core or low-density habitat boundaries will require a biological justification. All adjustments and related justifications will be documented thoroughly and retained in the archive of the ODFW Sage-Grouse Core and Low-Density Habitat Revision.

Goal: Complete the update to the Sage Grouse Core Maps and Plan in a timely manner

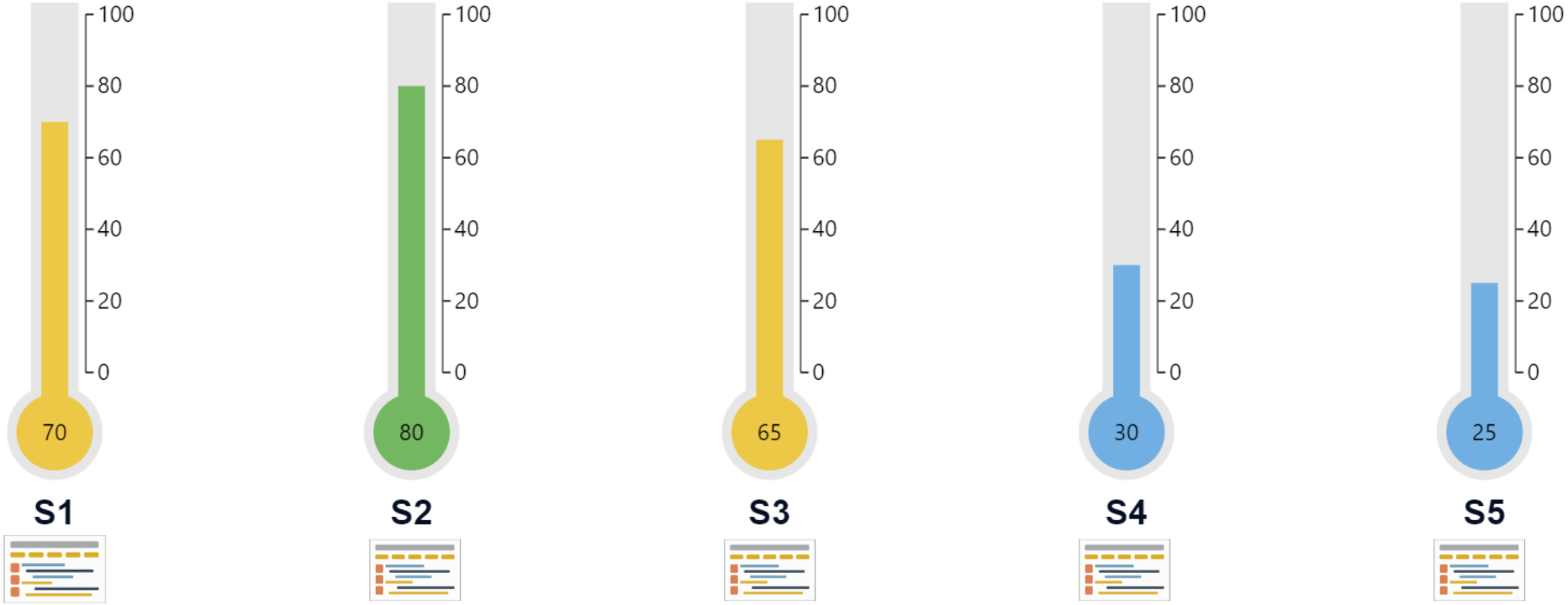
Objectives:
- Complete Federal Review (phase 2.5) by March 31, 2023
- Complete Partner and Public Review (phase 3) by July 31, 2023
- Deliver updated Core Maps and Plan to ODFW Commission for approval by 12/31/23

Strategies
- Conduct ODFW Internal District Review (Phase 2)
- Conduct Federal Review (Phase 2.5)
- Conduct Partner and Public Review (Phase 3)
- Revise Habitat Layers and Update to Sage Grouse Conservation Assessment & Strategy
- Present Plan for Approval by ODFW Commission

Latest Updates

Private Forest Accord Grant Program Start Up

Select the icon to see each strategy's schedule

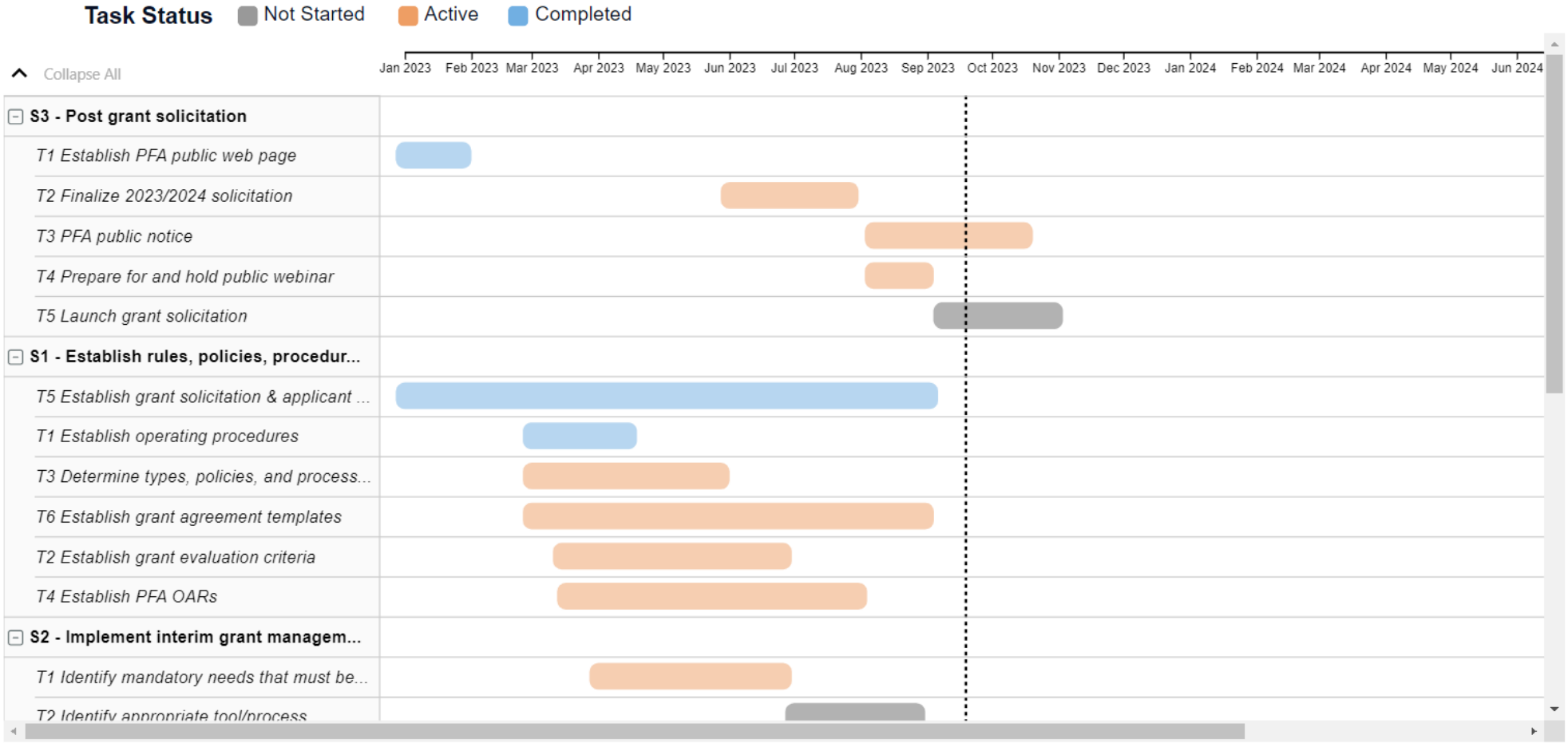


S1 - Establish rules, policies, procedures and templates
S3 - Post grant solicitation
S5 - Procure a grant management system

S2 - Implement interim grant management tools to support initial grant solicitation, award and reporting
S4 - Award PFA grants

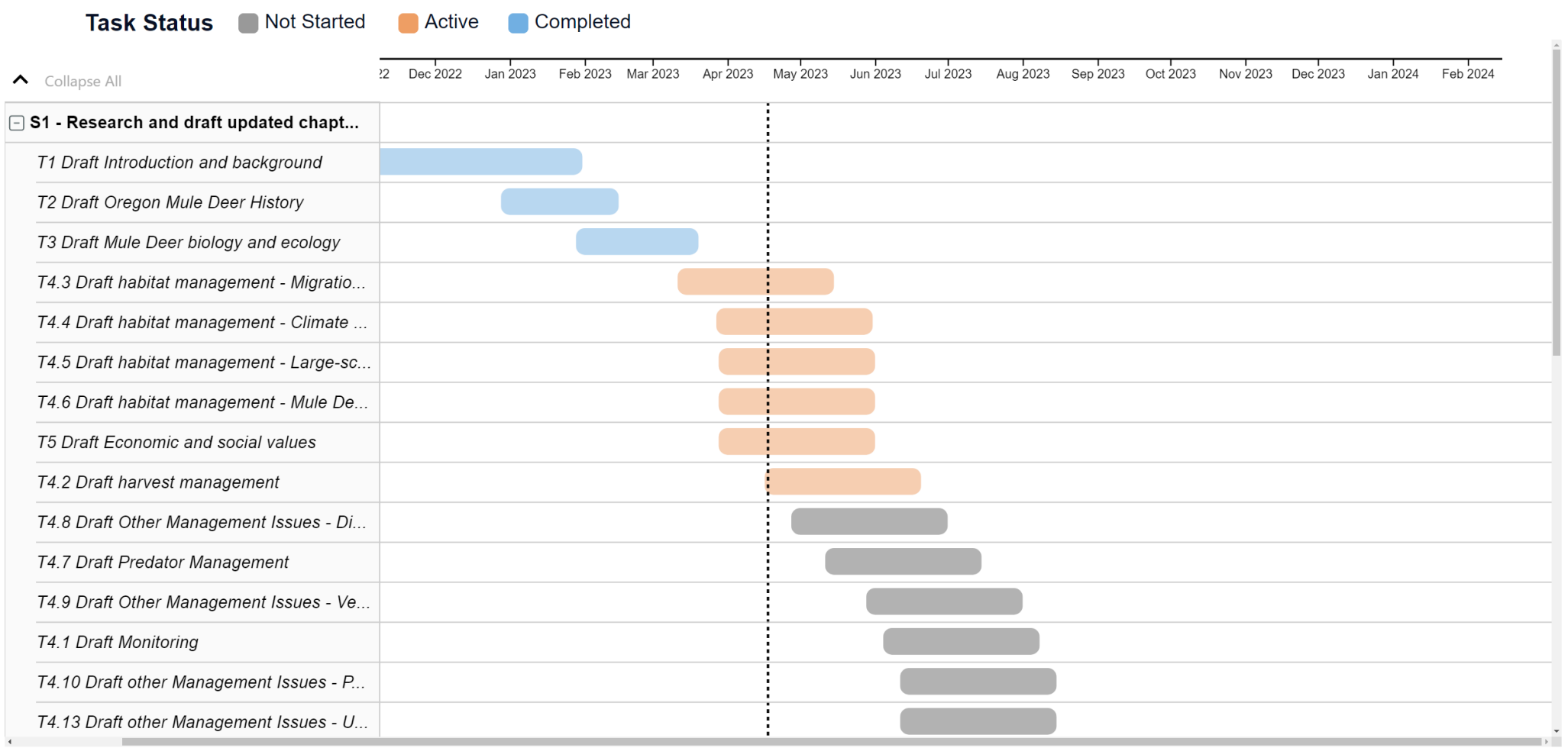
SPOC 2 - Private Forest Accord Grant Program Start Up

Task Detail Gantt Chart for all Strategies



SPOC 2 - Mule Deer Plan Development

Task Detail Gantt Chart for all Strategies



Commercial Top Level KPI Heat Map

DCS YTD (% of Sales)	Revenue YTD vs Budget (% of Budget)	GM$ YTD vs Budget (% of Budget)	EBITDA YTD vs Budget (% of Budget)
14.99%	108.03%	107.29%	123.19%

Opportunity Pipeline ($)	Dollars Excess Inventory (% of Total)	Automated Order Lines YTD (% of Lines)	OpEx YTD vs Budget (% of Budget)
27.78M	22.16%	73.22%	102.22%

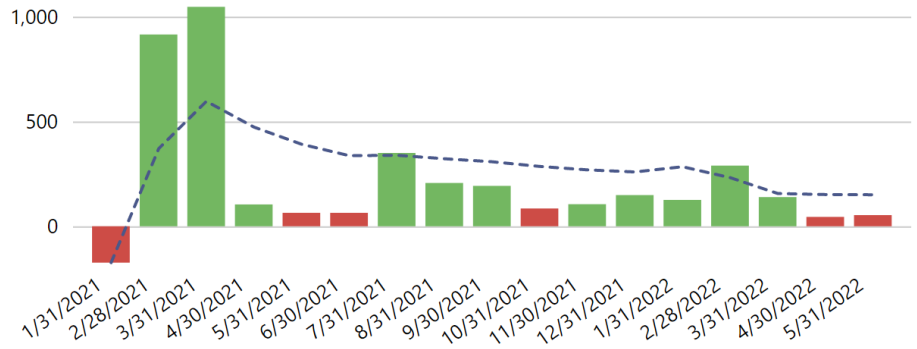
Sample Financial Summary

Results by MassIngenuity®

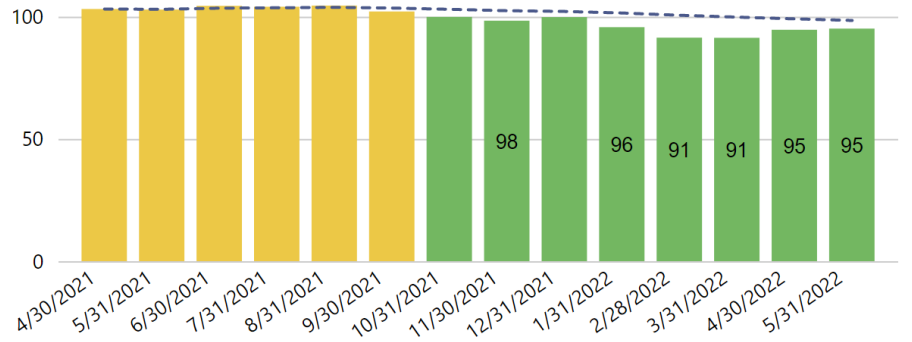
Financial Dashboard

7/15/2020 7/4/2022

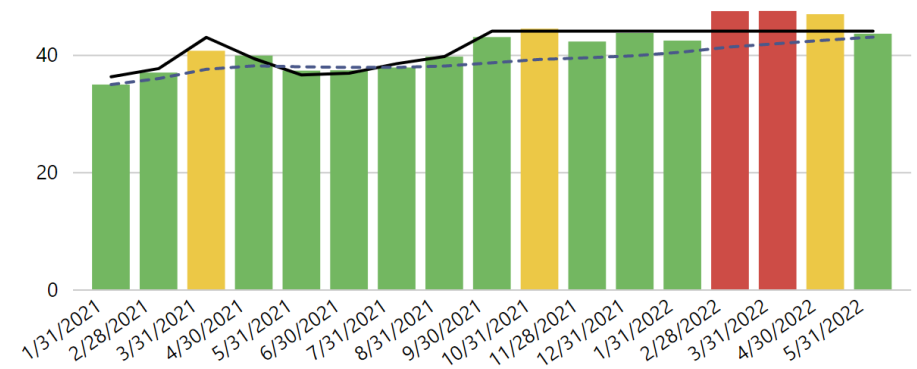
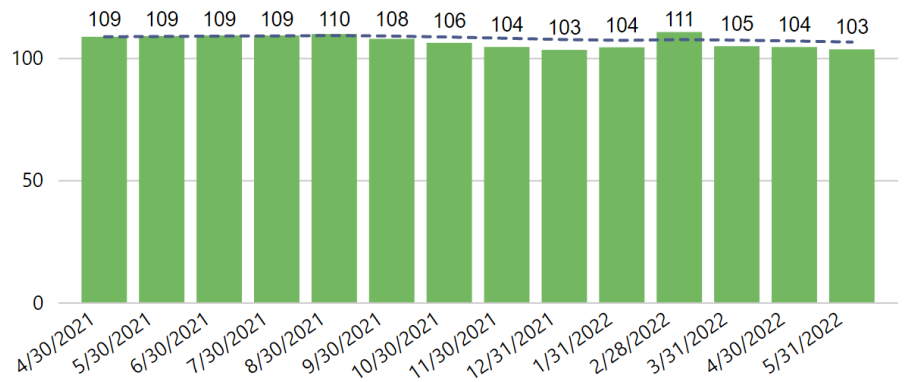
EBITDA vs. Plan



Operating Expense Ratio



Days Sales Outstanding



BCM% vs. Budget BCM%