Enterprise Performance Management: Mission-Driven Government

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About the California State Controller's Office

Mission

The SCO ensures the state government's monetary resources are independently accounted for and disbursed according to law in a timely manner.

Vision

The SCO strengthens California's fiscal and economic standing by protecting taxpayer dollars, promoting transparency, modeling financial integrity, and supporting accountability throughout government.

Values

- Responsible Governance
- Integrity
- Customer Service
- Innovation
- Collaboration







About Mass Ingenuity

- Deployed in over 80 state government agencies and 250,000 FTEs (Washington, California, Oregon, Arizona, and Pennsylvania)
- Power up strategy, deploy an effective enterprise performance management system, and connect strategy with day-to-day operations
- Integrate people, process, and technology
- Cloud-based Enterprise Performance Management (EPM) software and consulting services for strategy-to-execution excellence
- Results Software delivers a full EPM platform
- Connects to any information system through its API (application programming interface)
- Integrates with Power BI and Tableau (visual analytics tools)
- Set up in 5 business days with minimal IT resources needed



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Session Objectives

#1 - Describe the value proposition for Enterprise Performance Management in achieving an agency's mission, goals, and objectives while cultivating a results-driven culture.

#2 - Define the role of key performance measures and why data visualization matters.

#3 - Describe the executive's role and a roadmap for sponsoring Enterprise Performance Management in government.





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



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Results Management System™



Results

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Enterprise Performance Management: Problems It Solves

- Strategic and operational excellence
- Significantly greater visibility and management of initiatives
- Improved customer and financial outcomes
- People aligned around what matters most
- Greater clarity about roles, ownership, accountability, and inter-agency collaboration
- Improved resource utilization
- Increased employee engagement, productivity, and innovation
- Process waste and cost reductions
- Improved customer experience and satisfaction
- Technology as single source of EPM data
- Real-time visibility to enterprise performance measures, data, and visual analytics





The Heartbeat of EPM: Plan – Do – Check – Act



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The Why of Our Work

The value of a mission statement is in its importance to serve as the guidepost in achieving something and creating a culture unified by a shared purpose

It is ...

The Why behind what we do The Purpose of our work The Measure of our success

...as stewards of the public good!





The Why of Our Work



Source: Simon Sinek

Leaders as Champions of Enterprise Performance Management



Data Maturity: From Instinct to Optimized



Foresight

Hindsight

Data: the collection of facts, numbers, words, measurements, descriptions, observations, etc.

OPTIMIZED

• Fully integrated INSIGHT and accessible data Structured data INTUITION Real-time visual / Automated interactive dash-• Basic data (KPI's) INSTINCT collection boards Manual collection / • Basic analytics • Little / no data Understand what spreadsheets Understand why is likely to happen Ad hoc collection • Little / no it happened • Quicker and higher analytics Slow and quality decisions reactionary Understand what and actions happened Data-driven culture

A partnership with your data officer is critical as risk and data maturity often run in parallel and data is essential in creating meaningful measures (i.e., lagging and leading).

Uninformed / Reactive

Informed / Proactive

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Data Governance, Management and Analytics

Three Specific Functions That Work In Partnership



Governance

 Establishes goals, objectives, policies and procedures to effectively manage data assets

Management

 Actions the policies, procedures to compile and use the data for decision-making

Analytics

 Tests and validates data sources to ensure accuracy and integrity of data for decisionmaking

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Results Software: Two Key Engines

Easy-to-use tool to manage complex work and data!









Command Center Engine



COMMAND CENTER DASHBOARDS

A My Dat All Maps

🖌 All Tools + Projects 2 Present

& Admin

ADC AMS /









Leader standard work sets the tone for our organization and its performance management behaviors.





Business Intelligence Engine



Results November 20, 2018 5.50K MANAGEMENT SYSTEM Results Strategic Initiative Progress Scorecard 12000 2/1/2010 Daily Call Volum _____ MANAGEMENT SYSTEM Progress hty 2010: Understanding is causing some Miestone Stat 15 Number of Milestones 7 Number of Very High Priority Results 9 Map Name Milestones Due This Ye Latest Selected Common Meas Overall Scores Results **Customer Service Performance** rage % Satisfaction Across Three Sub-Meas 766 Measures Tracker 327 asure Owners Results 1/1/2018 12/31/2018 0-----0 nider to change dot Stats from Measure Data 82.50% 68.83% Average Percent System Uptime Response Tim 85.00% 79.17% Latest Budget Projection Accuracy Average Percer Training Comple 82.08 % 80.00 % Average Percent First Contact Resolution Latest Percent of Measures at Target Results **Outcome Measures Heat Map** Results Cardiology Measure Type Comparison 40.00 (-5

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Measure Type

BUSINESS INTELLIGENCE DASHBOARDS

Results

Enterprise Level KPI Heat Map

Strategic Plan KPIs

Vacancy	Digital	Revenue Per	Appointment	Customer
Rate	Adoption	Employee	Customer Wait Time	Satisfaction
15.3%	38%	\$114K	8.6 mins	4.1
Target = 8%	Target = 45%	Target = \$125k	Target = 15 minutes	Target = 4.2 out of 5

Employee	Cost Per	Budget to	Transaction Cycle	Ease of Digital
Engagement	Transaction	Actual	Time	Tasks
29.0% Target = 36%	\$22.67 Target = \$20	78.2% Target = 100%	8 minutes	6.2 Target = 7 out of 10

Detailed KPI View

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KPI Trends



Legend	Measure Owner	Data Steward	Threshold Type	View Measure	View Measure	View All
Target Line			GoodHigh	Description	Calculation	Comments

Enterprise Portfolio Management

Executive Sponsor

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All

Enterprise Project Health



Missing Updates
Red Status
Yellow Status
Green Status
CountOverall

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Name	Budget	Overall Health	Schedule	Scope	Staff
▲ 70+ RBM and DL410/DL6 Bot in IVR	Green	Yellow	Yellow	Green	Yellow
Agent Credit Card Functionality (IVR/SMS/Email)	Green	Green	Green	Green	Green
Al-based Remote Proctoring Solution	Green	Green	Green	Green	Green
Automate Bank-Issued Checks	Green	Green	Green	Green	Green
Blockchain for Vehicle Titles	Green	Yellow	Green	Yellow	Green
Ceridian Workforce Management	Green	Yellow	Yellow	Green	Green
Clean Air Decals	Green	Green	Green	Green	Green
Comcast SD-WAN Network	Green	Green	Green	Green	Green
Contact Center Systems Integration	Green	Green	Green	Green	Green
Customer Experience/Employee Experience Project	Green	Green	Green	Green	Green
Disital a Vacrianaa Diatform DDD DI	Oreen	Croop	Croop	Crean	Creen

Improvement Project Timeline

Results								
Project Schedule Behind Plan	Off of Plan/Paused	📕 On Plan 🛛 📕 Ah	nead of Plan	Unspecified				
Jul 20:	20 Aug 2020 Sep 2020 Oct 2020	Nov2020 Dec 2020 Jan 2021	Feb 2021 Mar 2021	Apr2021 May2021 J	un 2021 Jul 2021 A	ug 2021 Sep 2021 Oct 20	21 Nov 2021 Dec 2021	/ Jan
Align Quality Dept. to Improve Capabilities								
Determine Profitability and Corrective Actio								
Develop Quality Performance Tracking/Rep								
Improve Inventory Turns per Year								
Improve Schedule M anagement								
Optimize Sales Org Structure								
Redefine New Part Process								
Restructure & Implement Profit Share Plan								
Restructure Emplify Meetings								
Streamline Documentation System								
Validate the Green Carpet Experience								
Accountability Training for Supervisors								
Cross Training Program								
Cycle Time Reduction to Increase Capacity								_
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Commercial Top Level KPI Heat Map



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

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

Balanced Scorecard View of KPIs





Sample Financial Summary





Executive Sponsorship of Enterprise Performance Management

Executive sponsor's role is the full 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 cascade 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





Executive Sponsorship of Enterprise Performance Management

- Advocates for operational and strategic excellence
- Sponsors change initiatives effectively by clearly articulating what is changing, why the change is important, and how the change benefits the organization
- Remains actively and visibly engaged throughout the change process, regularly communicates directly with staff regarding progress, and shows authentic enthusiasm for the change
- Fosters employee engagement with a clear line-of-sight connection to the organization's vision and mission
- Assesses and accurately reports on current performance data on a regular basis, especially the process and outcome measures they own





Executive Sponsorship, cont.

- Incorporates data into regular 1:1 meetings with managers/supervisors; holds direct reports accountable for high performance
- Demonstrates best practices for managing the "strategy to execution" journey
- Models exemplary behavior in treating others with respect
- Shares difficult messages in a way that minimizes negativity, without diluting the seriousness or implications of the message





Achieving Mission Driven Government

- Focus your Enterprise Performance Management on achieving an agency's mission, goals, and objectives while cultivating a results-driven culture.
- 2. Establish key performance measures and powerful data governance, management, and analytics.
- 3. Describe the executive's role and a roadmap for sponsoring Enterprise Performance Management in government.



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