PuMP® Community Q&A Webinar

October 2011

This is the transcript of a webcast that was delivered by Stacey Barr, the Performance Measure Specialist.

Stacey is the creator of PuMP®, the unique approach to designing a performance measurement process that creates measurable KPIs that align, cascade and engage. For more than 16 years, PuMP® has continued to be the basis of her in-house consulting & coaching programs, highly acclaimed Performance Measure Blueprint Workshop and practical how-to information on her website. Her passion is to help Performance Measurement Practitioners grow their expertise, professionalism and leadership in measuring what matters.

Start of transcript:

G'day everyone. I'm Stacey Barr, the performance measure specialist of staceybarr.com and you already know I'm the creator of PuMP® and the Performance Measure Blueprint. Welcome to our PuMP® Community Q&A Webinar for the 25th October 2011. That’s if you’re in Australia anyway – it’s probably the 24th for some of you.

Today’s theme is building your KPI support team. Now, the purpose of these webinars is essentially to give your PuMP® implementation a boost. It’s available only for people who have been through the performance measure blueprint training and it is part of the PuMP® Community website, which is free for people who have been through the performance measure blueprint training. The PuMP® Community website is where you can get all kinds of things to help you with your performance measurement. It’s an ever growing collection of tools and templates, tips and case studies, discussion forums and webinars just like this one.

Today we are going to go through a few of your questions and also some tips to gathering around you the people that you are going to need to make your PuMP® – or any performance measurement
implementation, for that matter – a big success. Now, this is your support team. You are the implementer of PuMP® - the key facilitator if you like – because you have done the learning. This is about building your support team. It is not the same thing as a measures team. It’s not the same thing as a group of people that you are facilitating to apply PuMP®. Your support team is to help you be the best PuMP® implementer that you possibly can be.

**Update from Stacey**

Now, I do have a little update to share with you. On a personal note I am sitting here with an ice pack wrapped around my foot which is bad news for me. I am supposed to be running the 10km Noosa Triathlon this coming weekend for a team. My neighbour is the cyclist and a friend of hers is the swimmer and I’m the runner – well I’m hoping I’m going to be the runner. I’ve been training a little bit too hard lately and I think I overdid it with a little bit of barefoot running and hill running and there’s a chance I may have a stress fracture in my foot which I can’t even bear saying that out loud without shivering. I hope it isn’t a stress fracture. The physiotherapist has got me icing it every hour which is quite inconvenient I’ve got to say, but I have an ice park on it right now and hopefully it’s just a soft tissue injury and will recover in a few days but that’s very much on my mind at the moment because I’ve got this long weekend planned for the Noosa Triathlon and it will be lots of fun and if I don’t get to run it just won’t be the same.

I have another update for you before we get into your questions and this is something that I have been doing for the last few weeks and I have never really done it before and I’m really glad I started doing it. I’m calling it the PuMP® Study and what the PuMP® Study is, is a bit of research really that is helping me answer some questions I have about PuMP® and the implementation of the PuMP® blueprint. I want to understand to what extent people who learn PuMP® are going back and implementing at least part of PuMP®. How much are they implementing? What kinds of obstacles are getting in their way of implementing it? What factors are supporting their implementation of it? What kind of impact are they getting from implementing PuMP®? There are a few other questions as well but that is the crux of it. I really want to know what my next priority is going to be to improve and develop PuMP® even further so that it is easier implement and so that it is giving you the kind of impact it really should give you when you apply it. It’s a new research study and I’ve gone through pilot testing it with just over half a dozen people and finetuned the questions a little bit. It’s been a lot of fun because what I’m doing is calling people who have been to the blueprint workshop and asking them a range of questions, but it’s not in an interview sort of style, it’s much more conversation based. People know why I am calling them before I call them because I send them a little email and outline the questions and they’re prepared and when I ring them we just have these fantastic conversations about where they are implementing PuMP® and what success they’ve had and what little tweaks they’ve done to change something here and there. Someone had changed the name of the results map to an outcomes map because outcome was a word that matched more
closely a word that they were using already in their strategic planning. It’s been really humbling and really inspiring listening to what people are able to do with this methodology.

So my plans are to use a lot of this research – which will be ongoing for me; this is just a new part of my job description, if you like, is to call people and continually find out how implantation is going for them. I want to use that information to obviously improve PuMP® but I also want to use that information to help you guys improve your implementation, because there is a whole lot of great knowledge coming back from PuMP® users that should be shared and be made available to all of you. The PuMP® community will be the main forum that I do that. Now, the very first pearl that has come back already from these PuMP® study interviews is a case study. One of the PuMP® users here in Australia – Bec is her name – has applied PuMP® in three different ways in her organisation since learning it this year. She did the online blueprint earlier this year and she also came to the live workshop that we held in Melbourne back in June. We had our PuMP® study call and then we arranged to have another call where I interviewed her about her PuMP® implementation. The interview probably goes for about 40 or 50 minutes and we’ll also have that transcribed and turned into a written case study as well and that will be available on the PuMP® Community website. I want to grow those case studies so if you’ve got a PuMP® story you want to tell – and it doesn’t have to be a perfect PuMP® implementation and in fact it’s better if it’s not. It’s better if it’s warts and all because that’s how we learn best – by the mistakes that we’ve made and the little tweaks, fixes and changes that we’ve adapted and the good ideas that we’ve blended with PuMP®. And hearing other people implementing it can be quite inspiring.

So if you think you have got a PuMP® story that you want to tell let me know. Just email me. You can email me via Claire, my gate keeper - well not my gate keeper... Claire helps me manage my time so she takes all of the emails that we get and sorts through them, responds to the ones that she can and then passes the rest on to me so that my inbox only has things that I can act on. So email Claire at info@staceybarr.com if you have a PuMP® story that you would like to tell and I’ll contact you personally and we’ll set up a time and have a chat over the phone and create a case study to share with others as well. The case study that we created for Bec is not just valuable for you guys, Bec is going to find it valuable as well, to share with what she has done internally to generate even more interest in her colleagues to do good performance measurement. I’m really excited about that if you can’t tell.

Well we are going to start launching into your questions now. There are a few that have already been submitted but if you’ve got one that you want to ask live you can do that by using the Q&A box on the website. Just type that question in any time and once I’ve gone through the questions that have come through in advance I will check your live questions again and see what we can do to give you some ideas.
Questions from PuMP Community members

Alright, so these questions actually have come from PuMP® community members, but they come up during some of my PuMP® study chats with them.

Q1: How do you design surveys?

The first one comes from Cathy and Cathy was explaining to me about how a lot of her performance measures are going to be based on survey data. She’s going to need to set up some good surveys to collect data from customers or other stakeholder groups – surveys can be used obviously to gather data from more than just customers about satisfaction. Because she was talking about that I asked her “Do you have an approach for how you design surveys?” She said “Well, no. I haven’t really thought about it yet.” So I sent her a few tools to do with survey design. I wrote these a long, long time ago back when I was in Queensland Rail as the measurement consultant there because the job I had before I was the measurement consultant as Queensland Rail was being a survey statistician in a government research organisation. I took some of the knowledge that I had about surveys and turned it into a really simple approach to designing basic surveys to collect data in business. We don’t generally need very complex surveys when we’re trying to gather data for performance measures. I sent her these tools and what I wanted to do with you today is take you through generally some basic tips for survey design. Feel free to jot notes down right now if you want to, but also know that on the PuMP® Community website if you just put in the search box “designing surveys” you will come to a post where I’ve put those resources that I did sent to Cathy on survey design. There was certainly the survey design process outline which describes what the steps are to design a survey and I think I also put up there something on questionnaire design and also something on sample design – how to select a really valid and reliable sample. So look for those resources on the PuMP® community.

Right now I will just take you through the basic steps that are in the survey design process. Step one – like with most things – is about defining the purpose and the objectives. This means looking at what are the types of questions that you’re wanting the survey data to answer. Now, often it’s going to be ‘Well I want the data for this particular performance measure’. For me in designing the PuMP® study – which is a form of a survey – I did exactly that. I thought ‘Well what are the performance measures in my results map that I need data for that are going to come from the PuMP® study?’

I might just quickly open my results map so I can give you a couple of examples. Alright, it’s opened now. One of the results in my results map – which happens to be at the green level – is a result that simply says ‘Customers create great measures fast’. Now my measure for that result is a measure I’ve called ‘The PuMP® implementation cycle time.’ Now that is a measure from start to finish; when somebody starts implementing PuMP® with the view of coming up with some measures to when they have those measures and they are already deciding what improvements they are going
to make in their business on account of what those measures are telling them. That timeframe there is the PuMP® implementation cycle time and from the PuMP® study that's one of the questions I'm asking people: 'When did you start implementing PuMP®? When was your current or latest PuMP® project? Have you finished it? If you have, when did you finish it?' That data is then the data for the performance measure 'The PuMP® implementation cycle time.'

Another result I've got on my results map way out at the orange level is 'Customers succeed at their first PuMP® pilot'. It's really important to me that when people learn the PuMP® blueprint that the first thing they do when they go back to work is implement it and have a successful implementation. At the end of the workshop, or the end of the online program, I am always suggesting you keep a small area to focus on – maybe measuring just one or two goals – and use PuMP® to develop measures for that goal; measures that bring to life and that you use. That would be your first narrow scope implementation of PuMP®. When you do that you build momentum, confidence, you have a case study and you end up being able to implement more broadly with much greater success than if you start out trying to do it all at once. So 'Customers succeed at their first PuMP® pilot' is a result on my map and one of the measures I've got there is 'The PuMP® pilot success rate' which is the percentage of people who start a PuMP® pilot and end up with a positive impact in their business on account of the measures that they create. So that data also comes from the PuMP® study. So you've got to really start with those objectives of your survey. You've got to know what you want the data for. Don't create a survey like most people do which is by opening a Word document and starting to write the questionnaire – that's not the way to do it.

Step two still isn’t even about writing the questionnaire. Step two is about designing the scope and the segmentation of the people or the things that you are going to need to get that data from to meet the objectives you defined in Step 1. If you wanted to measure something like customer satisfaction and you’re doing it through a pulse survey, which would be a survey that you do monthly on a very small sample of customers, then the scope of your survey would be 'Customers who were active during the current month'. Active means that they’ve had some kind of interaction with you or they’ve purchased a product or service from you or something like that. For me, the scope of my PuMP® study is ‘Any person who has been to a live performance measure workshop – either a public one or an in-house one – or the online program.' So any person that has attended one of those programs is in the scope for a PuMP® study. The segmentation is interesting too. Segmentation is where you might say 'Look, I’m interested in looking at how PuMP® is going in government organisations versus non-government organisations or private sector companies?' That would be an example of segmentation. When you identify that segmentation might be important to you, then you’ve got to make sure that your survey is designed to gather reliable information for each of those segments.

I guess one of the segmentations I’m also interested about in the PuMP® study is ‘Did somebody come to an in-house workshop or was it a public workshop or the online program?’ That segmentation is important to me because it could be that people who
do the online program have much greater success because that program is stepped out learning one technique per week instead of it all being squeezed into two consecutive days. So if I discovered that then that would give me some ideas about what I might need to do for the workshop to give people a chance to apply what they learn before learning the whole thing. I don’t know what that would look like, but it’s just an example of why that segmentation is important to me. So one of the questions that I do ask in the study is ‘What was your method of learning the blueprint?’ Now I don’t have to actually ask that question because when I call someone I already know if they did the online program or which workshop they came to.

Now Step 3 in the process of designing surveys is to decide on the survey method and this is going to be ‘Am I just going to send out an email with the questionnaire, or a link to the questionnaire, or am I going to call people? Is it going to be a telephone interview? Is it going to be a face to face interview? Am I going to invite people to come to a focus group or workshop and take them through the questions in that kind of forum?’ What is going to be the method by which you do it? That will have an impact on the way you ask the questions, how many questions you ask, and how you structure the flow of your questionnaire as well.

Now Step 4 is to design the survey instrument or the questionnaire or form or tick sheet or whatever it’s going to be that physically captures the data. You’ve got to consider a whole range of things like which survey method you chose - how you design a form for online is very different to how you design it if you are going to be asking people questions in a telephone interview. For example, you need a lot more explanatory stuff in the online version because you’re not there to clarify the question if the respondent doesn’t understand. You also need to think about literacy as well - what are the literacy levels of the people you are asking the questions of? There is a range of issues you need to think about when you design the survey instrument or the questionnaire.

Now Step 5 is designing a sample and a sample size. I’m going to need to do that at some point because I don’t think I’m going to have the time to call every single person who has ever been to a blueprint workshop or online program. As much as I would love to it’s just not going to happen. Once I’m through this first stage of really bedding down the process of how to do this PuMP® study I’m going to need to work out a way of randomly sampling people so that I don’t get any biased results. The last thing I want to do is call the people that I know have implemented PuMP® and only talk to them because that would give me very biased data. I want to also talk to the people who haven’t had success in implementing it so I can learn why and understand what I could influence to make it more successful for them and for others who might be in a similar situation to them in the future. So how am I going to randomly select that sample, and how many people do I really need to talk to, to have enough data for it to be reliable? These are really important questions to ask. There actually is a whole other tool on how to design a sample and the appropriate sample size and that is in the PuMP® community right now on that post that I told you about. If you just search for ‘designing surveys’ or something like that you will come across it.
Step 6 is developing the survey procedures. For me in the PuMP® study that just means writing down a checklist of what I need to do each week to implement the PuMP® study. Do I need to select a sample? How do I do that? How do I email people first to let them know that I am planning on calling them and to schedule a time? How do I follow up if I haven’t been able to get in contact with somebody? When I am in contact with somebody and I’ve called them and we’re doing the survey what do I need to remember to say to them or to ask them or to offer them? What do I do once I’ve gathered the data? Where do I put it? All that kind of stuff. A nice, step-by-step checklist goes a long, long way. I love checklists. I’m a checklist fanatic. I’ve been putting off doing this PuMP® study literally for two or three months because I was just really anxious about how I was going to do it. I was worried about calling people and being an imposition. I was worried about asking them questions they wouldn’t feel comfortable discussing with me. I kept putting it off and when I finally sat down and just wrote the checklist out I realised it was going to be fine. All I had to do was follow each step on the checklist and my fears never became reality. I actually had a few people saying ‘I can’t believe you are calling me. Nobody whose training course I have been to has ever called me afterwards to find out if I am making use of it.’ It was a boost for me to know that this was appreciated and it wasn’t necessarily the imposition I feared it was going to be. So developing survey procedures is a really important thing to do. It also makes sure that you do it consistently as well and consistency is going to help preserve the integrity of your data.

Step 7 is test. Test, test, test. Do a pilot test. Like I said before, the was the first half a dozen or so phone calls that I did was my pilot test to make sure that I had the questions right, that I was able to capture the data – and I did make changes to the questions I asked and I did make changes to the layout of how I collected the data as well.

Step 8 would then be fine tuning and making changes to your questionnaire and your survey procedures and sample sizes – whatever.

They are really the steps in designing the survey. The document that I am referring to here which is on the PuMP® Community website also goes through the steps for implementing your survey as well. Like I mentioned before, there is another summary sheet talking about how to design a questionnaire and also how to design samples. I hope that resource will be useful for at least some of you who regularly use surveys to gather data. Let me know. Send me some feedback or write a comment on the blog post where this tool is posted to in the PuMP® community and tell me if you found it useful. That would be great. I can only improve things when I know how they need to be improved, so I am relying on you for feedback.

Q2: How can you measure the progress of performance measurement initiatives?

The next question I’ve got here from Paul who also asked this question when we had our PuMP® study call. Paul’s doing quite well with his implementation of PuMP® and
it’s a very big part of his job and he also wants to know that he’s doing a great job with implementing PuMP®. He asked me

“How can you measure the progress of performance measurement initiatives?”

It was, I think, a really brilliant question and strangely enough I was kind of already working on that with another tool that I’m developing at the moment, which is nowhere near ready yet guys so don’t hang out for it. I’ll let you know when it is ready. It’s called the Pump Performance Measurement Maturity Model, and it’s going to help me in more advanced iterations of the PuMP® study as well to gather more specific data about how successfully people are implementing PuMP® and what kind of success they are getting from better performance measurement in their organisations. So before I could tell you how to measure the success or the progress of a PuMP® implementation we really need to talk about what are the results that you should expect in a PuMP® implementation. We’re kind of applying PuMP® thinking here to figure out how to measure PuMP®. One of the examples of a result for good performance measurement is similar to what is in my results map ‘Measures teams succeed at their first PuMP® implementation.’ That could be measured by something like the percentage of PuMP® pilots with a positive impact, or simply the number of PuMP® pilots that are completed. Another result to do with performance measurement could be ‘Measures teams implement PuMP® well’.

Now I’m using this term ‘measures teams’ and I may not have explained it before. Usually I talk about it during our PuMP® workshops but if you can’t remember it’s simply the group of people that you get together to help develop a set of performance measures for a team or a process. Measures teams are usually four to six people.

Another result here is ‘PuMP teams implement PuMP® well.’ You could change ‘PuMP’ to be ‘performance measurement’ if you wanted to, it really doesn’t matter. Another tool that I’ve got which is available on my website if you want it – I think it’s also available in the PuMP® community – is the PuMP® Assessment Score. There is a PuMP® assessment tool that takes you through a whole bunch of criteria of great performance measurement systems and it gets you to sit down with a group of people and score yourself on how well you are doing with implementing each of those criteria. Then it gives you a score so you can work out how well you are implementing performance measurement.

Another result is that ‘Measures teams are fully implementing PuMP®.’ They are not just doing one or two steps, they are doing the whole thing – because that’s the only way you get the benefits of measurement, by implementing to a point where you are using measures to improve the business. The two measures I have of that result are firstly ‘percentage of PuMP® steps completed’ – on average how many steps in the PuMP® process people are getting through – and secondly ‘Percentage of business units who are using PuMP®’ – so how widely PuMP® is being applied across the organisation.
Another really good result I like is ‘Meaningful performance measures are created quickly’. There is no award for creating meaningful performance measures in the longest time possible. You want good measures quickly so you can start using them quickly. A measure to that is ‘The average PuMP® implementation cycle time.’

Another result that I think is a really good one to gauge how well your performance measurement implementation is going is to look at the impact that you want measures to have which, for me – at least in part – is that ‘strategic and operational goals are achieved faster’. What I mean by that result is that where you’ve got some kind of goal, objective or target, by having performance measures you will achieve those goals much sooner and you will probably even be able to go beyond those goals. You’ll be able to exceed those targets - that’s what I mean by ‘further’ – when you’ve got really good measures. So if your measures are fantastic that’s the kind of effect they should be having. You should be able to achieve those goals.

I wonder if you even know in your organisation or business how many of your past strategic goals or objectives haven’t been achieved. What is your track record at actually achieving the goals that you set out to achieve? A lot of organisations have a very poor track record at that.

So there are some examples of the performance measures you could use to monitor your PuMP® implementation. You can come up with your own, of course, by simply saying ‘What results do we want from implementing good performance measurement?’ Create your own little results map for performance management and then go ahead and use the PuMP® measure design technique to design measures for that.

Q3: How can I write up a PuMP case study?

The next question comes from Francois and when I spoke with Francois he was asking about

“How can I go about writing up my PuMP® implementation as a case study?”

This is something I would recommend all of you to do. It’s a great idea to write up your first few PuMP® implementations as case studies. Firstly, because it helps you become very conscious about what you actually achieved and about what you truly learned and would definitely do the same next time and also what you might do differently next time. It’s a wonderful reflection process to write the case study. The second really big benefit of writing a case study is that it can be used to inspire others to develop performance measures. It shows what measures can accomplish and that will help others to think ‘Wow, I think I would like to do that too.’ It’s a similar effect to the measures gallery. The measures gallery, in effect, is a piece of the case study where others come and see what you have done and very often we find at measure galleries that people will go away and start trying to create their own results map or they’ll bring their team into the measure gallery room and sit down and look at the one
that is on the wall and try to model it in some way and create their own. The case study can do a similar kind of thing to show others what can be possible for them.

The general structure of the case study is to basically structure it by step in the PuMP® blueprint. You’d have a chapter or section about making your strategy measurable and that’s where you would be talking about your results map. There’d be another section talking about your measure designs. Another about your measure gallery. Another about measure definitions and so on. So a section in the case study about each PuMP® step.

Now, the way that you write the case study for each of those steps is following a pretty similar format. There are four sub-sections I would put in; firstly, what did you do? So in the case of making a strategy measurable step or the results mapping step you would simply describe in the ‘What did we do’ bit what a results map is and how it works. It would just be a simple little explanation in your own words about what a results map is.

The second part is ‘Why you did it’ and in your own words describe the reasons for creating a results map. It’s going to be the reasons that your group most connected with. Some people find that the biggest driver for them creating a results map is to be able to see how they connect to the organisation’s corporate direction. That’s not the same for everybody. In other cases some people want to create a results map so that they can see all of the goals that they’ve got on one page, in one place, and not be so overwhelmed with having it written in lots of other different documents or just being spoken or un-written. So there is different reasons why people might want a results map. In your own words write down why you did it.

The third sub-section here is ‘How did it go?’ Include one or two versions of your results map, for example. Talk about what you struggled with, what you found easy, any insights or revelations that you got and just a bit of a summary about how you experienced and felt that process of results mapping.

Then finally the fourth sub-section would be ‘What did we learn?’ This is what lessons came out for you about results mapping. One of the lessons might be something like ‘We learnt that weasel words really don’t communicate anything and we’ve got to write things down in plain English if people are ever going to really understand it and if we are ever really going to know if we’ve achieved it or not.

Now those four sections ‘What we did. How we did it. How it went. What we learnt’ would be sub-sections under each step in the PuMP® blueprint and you would be putting in examples of what you did and just putting it all in your own words and the words of your measures team members.

That’s essentially the case study. Now I have a template for you on the PuMP® community if you want to do this. It’s a Word document. If you go to the PuMP® Community website, log in and in the search box type ‘PuMP case study template’ that will come up for you and you’ll be able to download it and use it.
I think there might be a few other search results as well which will be some examples of case studies written using either that template or something similar so that you’ve got something to model.

I hope that’s useful for you. Again, please let me know. If you do end up writing down your experiences in a PuMP® case study I would love to have a copy. Please send it through to me because I would love to have a read through and send some thoughts back to you, or tips if any come to mind. Maybe I’ll even come back with an invitation to interview you about your PuMP® case study as well to share with the broader PuMP® community.

So that is actually it for our questions that were submitted in advance. I am going to check and just if any of you listening have happened to have submitted a question as well before I go into the tips I have today about building your KPI support team. Okay, not seeing any questions coming in live which is fine. I will go on and share the tips I have for you. Before I do though, for those of you listening to this as a recording and not attending live feel welcome to submit questions in advance even if you know you are not going to be able to listen to the live webinar. The recordings are going to be on the PuMP® Community website forever, or as long as the website exists, so you can always catch up later and there you’ll have your question answered. I’m more than happy to receive your questions well in advance.

Today’s theme topic: building your KPI support team

The theme for today’s webinar – and I kind of like to do this for all of the Q&A webinars, to focus on a bit of a topic – topic is building your KPI support team. Now like I mentioned before, the KPI support team is for you. It’s to help you do the best job you can in helping people develop more meaningful performance measures. It’s not the support team that is going to do the implementation of performance measures necessarily. Your support team is to help you build your confidence, stay sane, answer questions when you’ve got them etc. They are going to be different people in your support team taking on different roles. You are not necessarily going to all get together; it wouldn’t necessarily be like a master mind where all of the members of your KPI support team meet regularly. It’s not that kind of support team. It’s just a group of people that you know you can go to whenever you need to for any kind of issue or challenge that might come up in your performance measurement implementation.

Performance measurement is a change process and it’s often going to be too big a change process for you to lead on your own. Even if you are the CEO or the senior executive or the performance manager, it’s still going to be too much for you to do all on your own. The support team is there to just help boost you, give some hands on support where it’s needed and help you find quicker ways and not be re-inventing the wheel and making mistakes you don’t necessarily need to make.

The consequence here is that when you have a good support team you will go faster, have the energy of the people being injected into your implementation and their
passion as well; people in your KPI team would share your passion for performance measurement.

Look, I could talk from experience here. Performance measurement is a lonely field. There’s not a lot of people that I know personally that work in this field. There are a few around the world that I’m really grateful to be able to connect with like Dean Spitzer in the US who wrote *Transforming Performance Measurement*, David Parmenter who wrote *Key Performance Indicators* – I catch up with him occasionally – Stephen Few, who is not so much in the performance measurement field but certainly with his work on dashboard design and the visual display of information he’s certainly related to this field and he’s a great person to chat with as well. But they are far away from me; they are not a local support team so that’s something I’ve found is a little bit lonely just being me and not having a group of people I can meet with regularly about this topic.

I think the PuMP® study calls are helping me out a lot because I’ve been quite surprised at just how advanced a lot of people are with implementing PuMP® and I can see them as peers; not just clients or PuMP® users but peers who can really help me in my own performance measurement efforts too. So it can be a lonely field. I imagine it could be similar for you too. You don’t have a great big group of performance measurement practitioners within your organisation and maybe you don’t know too many outside of your organisation either, so deliberately trying to build that support team will be great.

Now what I am going to do now is go through the various types of people that I think would be invaluable in your KPI support team. I’ll talk about why I think they’re important and also give you some tips and hints about where to go to find these people and also how to engage them.

**Your coach or mentor**

The first kind of person that you need in your KPI support team is a mentor or a coach. Somebody who is a go-to person and you will either pay this person or you won’t pay them – it depends on the relationship you manage to strike up with them – but they are there to give you content knowledge – ‘how to’ knowledge to boost your capability in performance measurement. They are a very important person to have in your KPI support team so that you don’t go making mistakes you don’t need to make and so that you can talk about your ideas with them first before you implement and draw on their wisdom about what it likely to work well and what may not. A coach or a mentor will also boost your confidence. They will remind you of what you’re doing well; they’ll highlight to you the ideas that you have that are particularly good ideas, and they will really encourage you to go ahead and try them in a context of continual action learning, not ever thinking that you should avoid something just in case it fails. So a coach or a mentor will really help you be a more confident practitioner and to take some risks you otherwise may not have taken. They will also help you when things get tricky. If you get really stuck you can talk to them because they’ve likely had the experience before
and can tell you how they might have handled it or how they would handle it differently next time.

Now, where to find a coach or a mentor. There’s probably a few different places you could go looking and one is to go find a performance measurement thought leader. Who is out there in this space who is giving out information that you like, who has a personality or a style that you really resonate with, whose advice you respect and ideally whose advice you have taken in some form or other and put into practice with some success. You have confidence in this person and they have credibility for you. Performance measurement thought leaders are generally going to be authors and I guess I would put myself in this category as an example of a performance measurement thought leader – thought my website, through the Measure Up newsletter and I will be an author in the not too distant future, just not quite yet. Another place to find a mentor or a coach is through finding experienced performance measurement practitioners that are in other organisations. They are not necessarily authors or consultants and they may not necessarily have a website but you’ve met them maybe at some kind of networking event or maybe at a PuMP® blueprint workshop or some other training workshop and you can see that they have really done some good stuff with performance measurement.

Now, they do not have to be experts and they do not have to be the world’s best performance measurement practitioner – they just have to be more advanced than you are right now. You can change your mentor later on – if you catch up to your mentor or pass them you can find another one but as long as this person that you choose is more advanced than you are in the performance measurement field then they can quality as a mentor.

The third place where you can find them is consultants. You may have worked with a performance measurement consultant or a strategy consultant that has performance measurement skills but the consultant needs to have a track record of successful performance measurement. They can’t just be someone saying ‘Hey, I’m not offering performance measurement services.’ You have to be confident that they know what they are talking about and that they’ve had success. You want to see where they’ve worked and want to talk with the clients they’ve had and see any case studies they may have written to feel confident that they are not just a ‘fly by night’ KPI consultant and that they are somebody who really has got some good wisdom and experience to share with you.

When you want to engage a mentor or a coach there are a couple of things really worthwhile to think about. One is to make sure that you do your research on them. Make sure that you know who they are, what they’ve done, what they’ve achieved, whether their values are similar to yours, whether you’re likely to click with them, what is important to them, what their speciality might be. Do your research. Don’t just approach the first person that you find. So look through their website, talk to organisations that may have used them, try and find out where they may be speaking or doing webinars or writing articles on other blogs or in magazines or journals or
anything like that. Make sure that you feel comfortable with the idea of them being your mentor or coach.

The second thing that is really important to do — and I am speaking a bit from experience here too — I very often get emails from people asking me to be their coach or mentor and their email goes into all the things they want from me. One even asked me to travel to the other side of the world to observe some work that they were going to be doing and had made no mention at all of hiring me for this, they just asked if I would do that. You’ve got to think about what is in it for your coach or mentor as well. It’s not just what is in it for you, what do they get back in return?

If you are going to hire a coach then what they are getting in return is obviously some financial reward for the time that they give you and that’s a very common coaching relationship. In fact, the kind of coaching that I offer is exactly that — you can buy six sessions from me for a set amount of money and we talk about what you need to talk about in each of those sessions. But it doesn’t always have to be money; sometimes you can get a coach or a mentor without having to pay them when the return is good enough. I had a mentor relationship with a client who ran a small boutique health club in Sydney where I did not charge him for the calls that we had but the agreement was that in helping him through implementing PuMP® for his business I could get a case study out of that in that everything we did I could document and turn into a case study. That was the return that I got out of that.

So don’t think that performance measurement thought leaders, experienced practitioners in other organisations, or consultants, have got loads of time just to give to anyone that asks. They usually don’t. They are very busy people and because they are experts in performance measurement they’re also very good at knowing what their priorities are — that’s what good measurement helps you do. So they know how they want to spend their time and if you want a relationship with them but in no way can contribute to their priorities it’s unlikely that relationship will be sustainable, if it will work at all.

Your champion(s)

The next person to consider having in your KPI support team is a champion — or one or more champions. You are going to find the champions within your organisation. They are going to be the people who will clear the way and make opportunities for you to implement performance measurement. They are going to be the people who can make it clear what the priority of performance measurement is so that you don’t have to fight what the Franklin Covey Institute calls ‘The Whirlwind’ – the urgent everyday stuff always gets in the way of the important things like performance measurement. So champions are important to play that role for you and make it easier for you to find places to implement performance measurement meaningfully.

Now where to find them is going to be in your senior executive team more often than not. It’s going to be a senior executive or two who are goal oriented for a start, who believes in continuous improvement and who values performance measurement as a
tool to help them achieve that. If you can’t get someone like that from your senior executive team – who obviously carry a lot of clout and would be great to have – the next place to look is in the middle management ranks. Is there a manager that satisfies those conditions as well, that would be willing to really make performance measurement a priority in his or her team for you to work with and help them develop great measures?

Now how to engage a champion is to firstly learn what their priorities are. What is important to them? Do they have specific goals they are trying to achieve? Are they really trying to double their venue in the next twelve months? Are they trying to eradicate rework? Are they trying to improve productivity? What are their priorities? If you know their priorities performance measurement has a valuable context to relate to. You don’t go to people with performance measurement; you go to them with a solution to achieve their goals. So that’s the important thing to do when you are engaging them – to make it about achieving their goals, not about measures.

Your “comrades-in-arms”

Now the third type of person, or people, to include in your support team are what I’m calling the comrades in arms. These people are going to be colleagues in a sense, either in your organisation or outside of your organisation and they are going to help you reflect clearly on your performance measurement experiences because by doing that it helps them reflect on their own. They are going to share knowledge and tips from their own performance measurement practices and they are going to provide mutual support. So when things get tough for you just having a shoulder to cry on or somebody to stamp your feet and yell, not at but with, can be quiet therapeutic.

It’s also worthwhile having comrades in arms so that you stop being so insular and getting caught up in just the culture of your own organisation and their attitudes towards performance measurement. You need to be broader and bigger than your organisation’s view of performance measurement.

Now, where to find your comrades in arms could be internally – other performance measurement practitioners within your organisation. Many of you have been to a PuMP® blueprint workshop with your colleagues and they would be your first port of call to add to your KPI support team. It could be people in performance measurement related roles in other organisations as well – other performance measurement officers or managers. Look on LinkedIn, for example, for performance measurement or KPI groups that are on LinkedIn and do a bit of networking there and that way you would be able to find people in your role, or a similar role, in other organisations that you could connect with. Don’t limit to your industry or sector though, the broader you can go the better. Sure, having a few in your industry or sector can be helpful but also having some outside can be helpful in broadening your view.

PuMP community members are another place to go to look for people to add to your KPI support team. You really ought to be networking with each other because there’s so much you can learn from each other about PuMP® specifically.
The way to engage them is firstly to introduce yourself and suggest what the value might be in connecting. You want to be able to stay in touch with your comrades in arms at least monthly, even if it’s just a quick email hello, but participating in online forums is a good way to do that too. Or form a mastermind group where you do get together with your comrades in arms on a regular basis – maybe it’s monthly or maybe it’s quarterly, but you physically get together. You meet for lunch or for an afternoon and you might have a little agenda where you go through your current challenges and you help each other solve them, go through each other’s successes or insights and you build your collective knowledge that way.

Your “expert network”

Now the next type of person I would recommend you have in your KPI support team is an expert network. This is about filling the gaps that you can’t fill or that you won’t fill in your performance measurement role. It will speed up your implementation when you have these experts to draw on. Now the kind of experts I’m talking about are people who might be real gurus in database development, because you need to have good access to data if you are going to bring your measures to life. A dashboard guru, somebody who really knows how to design great performance reports or dashboards and understands how to build them, understands how to listen to what you want and to bring that to life in an electronic interface. You might also want to include in your expert network meeting facilitators. Somebody or some people who are particularly good at running meetings. They don’t have to know anything at all about performance measurement and if they don’t that is even better. They just need to know how to run an effective meeting and you can learn from them about how to run effective meetings and also draw them in when you’re having a particularly challenging meeting – maybe it’s the results mapping meeting and you just want somebody to help keep everyone on track, focused and keep the conversation productive. An organisational change guru would be a good person to include in your expert network. Somebody who understands the change process and understands what it’s like for people to go through change and how to engage them in change. Maybe an analytics guru, like a business analyst or somebody like that, or a survey statistician could be a good person to have in your network as well.

So your expert network is about plugging the gaps that you aren’t going to. All of them, obviously, are about supporting some particular step or phase in the performance measurement process.

How to engage them is to bring them in when you need them. When you are doing a performance measurement implementation and you are having trouble getting data out of a database then bring in your database guru and get them to help you work out a plan for how to solve that problem. You want to stay in touch with them every now and then, not just during your performance measurement implementation, just to maintain that rapport and that connection with them is a wise thing to do.
The “doers”

Now the last group of people I would suggest you have in your KPI support group will be the doers and these people will help you share the workload. It’s not going to be all on your shoulders. They’ll also help spread the message about good performance measurement – why it is important and how to go about doing it well.

You’ll find these people in business analyst positions but also just any staff member at all who has a passion for measurement and who really believes in measurement. They will be people that you engage by involving them in measures teams; bringing them into performance measure implementations as well.

So that is the collection of people I would suggest you have in your KPI support team. Firstly, a mentor or a coach. Secondly, one or more champions. Thirdly, a group of comrades in arms – people who are just like you in other organisations. Fourthly, an expert network to plug the gaps that you are not going to. Finally, some doers – people that you can draw in to be part of measures teams.

I hope that was useful. I just had an idea to share this with you a few weeks ago. I can’t even remember what the trigger was that I thought it would be a different thing to talk about. We’re not really talking about performance measurement but it’s such a valuable thing to do, to have that support team around you.

Close

We are done for today. I can’t see any more questions coming through live so I’ll wrap us up.

Thanks again for joining me. As a reminder, it has been our October 2011 PuMP® Q&A Webinar.

Remember that I’m regularly adding content to the PuMP® Community website. Generally I’m adding content when somebody has emailed me a question and I think it’s a really great question and if I’ve got a tool to help them answer that question, or to help them solve the problem, I will give it to them but I will also put it in the PuMP® community as well because if it’s something they are struggling with it could be something any one of you are struggling with as well. So there is always new content going up there.

I would suggest making it a discipline, so each month schedule 30 minutes in your diary and that way you will know it’s there and you’ve allowed the time to just go and log in to the PuMP® community and have a scoot around. Have a look at what’s new and maybe do a search for a topic that is currently relevant for you – survey design, for example, or writing up a PuMP® case study – and see what resources come up that might be useful for you.
I will eventually be able to start emailing you little updates about what gets added to the PuMP® community and when but there's just so much on the radar at the moment with the performance measure blueprint online program and the PuMP® certification program and also, as many of you know, I am still supporting my sister through her leukaemia treatment and I just haven’t gotten around to setting up those emails to regularly contact you, apart from letting you know about the Q&A webinars. That will probably happen early next year.

But don’t wait for me – feel free to stay in touch. Let me know how your PuMP® implementation is going. Like I said before, email me via Claire at info@staceybarr.com. Let me know if you’ve got a story that you would like to share with the PuMP® community, a case study that you might like me to interview you for and just keep going really. Continually improve your enjoyment and your confidence and your success at getting your organisation to really measure what matters and transform its performance.

Well everybody, that’s it for today so I will bid you adieu and catch up with you via email over the coming weeks.

This is Stacey Barr signing off until next time.

End of transcript.