Finding Meaningful Measures for:  
[Team Name]

*Use this template to facilitate and document your team’s progress in finding meaningful performance measures.*

# About the team

Describe who the team is and briefly what they do.

# STEP 1: Get your team customer-focused

## Step 1.1: What are the team’s outputs?

The primary outputs of the research team include:

* List the team’s tangible and not so tangible outputs here

## Step 1.2: Who do they give these outputs to?

List the team’s outputs again here, and flag which customers they are for. You might need to change the number of customer columns.

|  |  |  |  |
| --- | --- | --- | --- |
| Output | Customer 1 | Customer 2 | Customer 3 |
|  | ✓ |  |  |
|  |  |  | ✓ |
|  |  | ✓ | ✓ |
|  | ✓ | ✓ |  |

## Step 1.3: Create "Customer Personas"

For each of the groups above, create a customer persona (based on a real customer) and describe who they are and what’s important to them in their work.

Make each Customer Persona as personal and real as possible. When you think about a real person as opposed to a ‘target market’ or ‘customer segment’, you will more easily engage with the customer and better understand their needs.

| Customer Persona | Description |
| --- | --- |
|  |  |
|  |  |
|  |  |

# STEP 2: Narrow down the team's most important outcomes

## Step 2.1: What matters most to customers?

Decide how you will identify the service attributes that matter most to each customer persona. Focus groups? A one-question survey? Analysing existing data?

Each service attribute should focus on a single, unique concept e.g. ‘accuracy of invoices’, ‘easy to understand instructions’, ‘friendliness of staff’. Avoid multi-barrelled attributes such as ‘accuracy and clarity of invoices’, ‘easy to understand and easy to follow instructions’, ‘helpful and friendly staff’

Then through this research, list up to a dozen of their most important service attributes in relation to the service your team provides:

1. Attribute 1
2. Attribute 2
3. Etc…

## Step 2.2: How well is the team doing these things?

Decide how you will quantify the satisfaction and importance that customers place on those most important attributes of service.

You can use the ‘Hard to Measure Teams CUSTOMER QUESTIONNAIRE TEMPLATE’ to get you started.

Then capture the data, and calculate the satisfaction and importance scores for each service attribute.

You can use the ‘Hard to Measure Teams CUSTOMER QUADRANTS TEMPLATE’ spreadsheet to do all these things.

## Step 2.3: What are the team's priorities?

Review the priorties of each quadrant in your team’s Customer Priority Quadrant graph, and choose up to 3 of the highest priority service attributes requiring improvement.

When you use the ‘Hard to Measure Teams CUSTOMER QUADRANTS TEMPLATE’ spreadshee, the Customer Priority Quadrants are calculated automatically.

# STEP 3: Uncover the team's points of highest leverage

## Step 3.1: Outline the team's process

|  |  |
| --- | --- |
| Process name: |  |
| Purpose: |  |
| Owner: |  |
| Start point: |  |
| End point: |  |
| Macro steps: | 1. Describe the process flow in 5 to 7 steps |
| Process outputs: | * Copy your process outputs from Step 1.1 |
| Stakeholders: | * Which groups of people or other teams or organisations play an active role in this process? |

## Step 3.2: Draw the cross-functional process

Edit the following process flowchart by double-clicking. It will open an embedded PowerPoint slide and you can copy, paste, type into and modify the process flowchart.



## Step 3.3: Analyse the process for disconnects

List the disconnects here:

* Frame them as problems (later you’ll convert them to performance results)

# STEP 4: Clearly map the team's most measure-worthy results

## Step 4.1: Translate the process purpose into results language

|  |  |
| --- | --- |
| Process purpose | Performance Results |
|  |  |

## Step 4.2: Translate the customer priorities into results language

|  |  |
| --- | --- |
| Customer Priority Attributes | Performance Results |
|  |  |
|  |  |
|  |  |

## Step 4.3: Translate the process disconnects into results language

|  |  |
| --- | --- |
| Process Disconnects | Performance Results |
|  |  |
|  |  |
|  |  |

## Step 4.4: Create a results map

Edit the following results map by double-clicking. It will open an embedded PowerPoint slide and you can copy, paste, type into and modify the results map.



# STEP 5: Engage the team in designing their own measures

## Step 5.1: Design measures for each result

Copy and paste the following PuMP Measure Design template as many times as you need it (one for each Performance Result in your Results Map that you intend to measure):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| begin with the end in mind | Write a performance result here, from your Results Map. | | | |
| be sensory specific | * List the evidence you would see, hear or observe in some way if the performance result was happening as you would like. | | | |
| find potential measures | *potential measures* | *strength* | *feasibility* | ✓ |
| 1. Write down ideas for how to quantify/measure each of the sensory-specific evidence statements you wrote above, then rate each potential measure’s strength and feasibility |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| check the bigger picture | * Discuss any unintended consequences of using the measures you have selected – if there are none that’s good. If there are, then either avoid those measures or consider how you might mitigate the consequences | | | |
| name the measure(s) | Give each chosen measure a name and a description that alludes to how it should be calculated.  Name = Description | | | |

## Step 5.2: Prepare the measures for implementation

List your complete set of performance measures here, for each Performance Result:

| Performance Results | Performance Measures |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Next steps…

The next steps are to define the data and calculation requirements for your measures, and begin reporting them and using them in monthly team meetings.

About implementing performance measures…

This template guides you through a process for how to identify what is worth measuring, specifically for hard-to-measure teams whose performance results or goals are not easy to define.

But **there are more steps in the performance measurement process** that follow on from selecting the performance measures, including sourcing the data, computing the measures, graphing them, reporting them and interpreting and using them to improve performance.

The PuMP Blueprint is a methodology to support this entire performance measurement process. When your team has successfully reached this point, **PuMP is a logical next step** for them. For more information:

<http://www.performancemeasureblueprint.com/>