

Manager Appraisal

Name _____ Date _____

STATEMENT	EVALUATION						EVIDENCE
There is a clearly defined strategy for ensuring processes and people are customer focused, and their is active management of the progress and effectiveness of it	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
Customer satisfaction is regularly measured and improved, and there is clear evidence of increasing partnership with the customers in terms of joint teamworking.	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
The performance goals and improvement targets are very much in evidence both visually and in routine communications. It is clear that they are everyone's priority.	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is a clear strategy to value the 'right' behaviours, and management actively support this by analysing the issues and developing clear plans to address behaviours as appropriate	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is a clearly defined strategy for using challenges and training to develop the competence of the department, and performance against this is measured	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is clear evidence that the Mgr has coaching plans and records for his/her direct reports and regularly coaches them in the development of management skills and attitudes	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
Key business processes are well defined, and in control. Up to date maps or schematics exist, there is clear guidance for those working in them, and there is recent audit data	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is clear evidence of project work to systematically improve process performance and quality. Performance is monitored and the PSD used to address issues.	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is prominent visible evidence of the measurement and trending of current performance in all key areas. Quadrant charts are well used and result in clear improvements.	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is evidence that the quality & availability of information is regularly audited, & reviews regularly used to analyse weaknesses and improve the quality of future decisions	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is regular seeking of ideas and solutions from outside of the dept/process, and clear evidence of their evaluation and implementation into the practices of the dept/process	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	
There is a clear mechanisms for seeking & encouraging improvement at all levels of the dept/process, and evidence of active promotion of the concept of continuous improvement	Almost totally true 5 <input type="checkbox"/>	Definitely more true than untrue 4 <input type="checkbox"/>	Slightly more true than untrue 3 <input type="checkbox"/>	Slightly more untrue than true 2 <input type="checkbox"/>	Definitely more untrue than true 1 <input type="checkbox"/>	Almost entirely untrue 0 <input type="checkbox"/>	

Application of Systematic Management

Total score (out of 60) = []

STATEMENTS	RATIONALE	EXPECTED EVIDENCE	REAL ZEAL
<p>There is a clearly defined strategy for ensuring processes and people are customer focused, and their is active management of the progress and effectiveness of it</p> <p>Customer satisfaction is regularly measured and improved, and there is clear evidence of increasing partnership with the customers in terms of joint teamworking.</p> <p>Can the manager:</p> <ul style="list-style-type: none"> • Explain clearly why he/she is trying to build closer relationships with his/her customer? • Specify SMART performance targets for what he/she wants to achieve by this? • Show evidence of involving his/her people in building close customer relationships? • Demonstrate the existence of clear processes for building closer relationships? • Illustrate his/her current progress through objective measures of the relationship? • Identify the learning he/she has made in trying to establish closer relationships, and show how he/she has modified his/her approach through this? 	<p>It is very easy for people to get wrapped up in the task they are doing, particularly where the task has technical challenge, and this can cause us to lose sight of the customer and the real purpose for our work. Eventually the technical challenge becomes the reason for our efforts, and the customer becomes somebody who confuses the issue and distracts us from it.</p> <p>In a technical environment focused on projects, the internal value set and peer approval can reinforce this, especially where the customer is largely absent.</p> <p>Sometimes this is temporarily redressed through an initiative or training, but these are often a single isolated burst, which soon fade into a background of consistent technical merit.</p> <p>Balance of technical excellence with customer focus can only be obtained where the focus on customers is maintained as consistently as the technical interest and value set. To achieve this requires an ongoing programme of awareness, customer contact, recognition.</p> <p>Of course it is still possible to pay lip-service to such a model, and allow the activities to become trivial and our response to them cynical. Avoiding this requires that our approach has very clear objectives, a clearly thought out approach (strategy), is actively measured in terms of its effectiveness against these, and any deficiencies are actively addressed.</p> <p>The key measure that is essential to assessing the ultimate effectiveness of our strategy in inspiring and guiding our efforts is the growth of "Customer Satisfaction".</p> <p>It is vital to the ongoing improvement of customer focus that Customer Satisfaction is measured. Without such a measure, Customer Focus becomes impossible to manage systematically. And without a prominent display of the measure it is unlikely to be seen as important by the staff.</p>	<p>At the very least there should be the evidence of having explored and understood the current situation in terms of the extent of customer focus in the department.</p> <p>The manager should be able to articulate the current level of customer focus, to illustrate this through real examples of current behaviour, and to judge accurately the extent and depth of this in his/her department.</p> <p>In dealing with the issues arising (or in positive cases to maintain the situation) the manager should have a clearly defined strategy written down. This should specify in SMART terms the goals he/she has for customer focus in his/her department, a clear milestone plan for how this is to be delivered and maintained, and scheduled dates for reviewing and addressing progress.</p> <p>There should be evidence that these things are in active use, such as minutes of meetings, data on progress, plan on display etc.</p> <p>The elements of the strategy that are likely to be planned, or already in place would almost certainly include:</p> <ul style="list-style-type: none"> • Familiarisation and other training sessions/material • Involvement in customer activities • Customer visits & surveys (or interviews) • Workshops on how to better support our customers <p>Evidence that the strategy was effective would include:</p> <ul style="list-style-type: none"> • Consistent citing of the customer in discussions • Visible measured progress against the objectives in the strategy • Prominent visual evidence of Customer Satisfaction targets, trended performance, and future actions for improvement. 	<p>Managers who have a real passion for serving their customers are likely to include other activities in their strategy. For instance:</p> <ul style="list-style-type: none"> • Kano analysis (in which the types of customer requirement are broken down and analysed) • Why-how charting of the department's role • Rethinking management's role in customer service • Customer based QFDs linking requirements to service processes and system functionality. <p>They will use this detail level of understanding to actively redesign and hone their process and services to focus on the customer's needs and exceed their expectations.</p> <p>Successful pursuit of the right strategy will inevitably result in increased Customer Satisfaction, and this would be evidenced by an upward trend on the published graphs, and by celebration and recognition of that success (in order to maintain a correct sense of its importance to the management)</p> <p>It is unlikely that the customers perception of improvement will be sustained over the long term without involving the customer in taking some responsibility for that satisfaction, and this is likely to be developed through:</p> <ul style="list-style-type: none"> • Joint project teams and a degree of co-location • Secondment to specific customer projects • Customer responsibility and targets for their performance in the relationship (wanted by them and not imposed) • Partnership workshops in which the focus is on how we improve service to our customer's customer • Shared reward and recognition systems

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<p>The performance goals and improvement targets are very much in evidence both visually and in routine communications. It is clear that they are everyone's priority.</p> <p>There is a clear strategy to value the 'right' behaviours, and management actively support this by analysing the issues and developing clear plans to address behaviours as appropriate</p> <p>Can the manager:</p> <ul style="list-style-type: none"> • Explain clearly why he/she is trying to ensure a clearer understanding of the department's goals, and establish a consistent value set in the department? • Specify SMART performance targets for what he/she wants to achieve by this? • Show evidence of involving his/her people in defining the goals and values, and in ensuring there is commitment to them? • Demonstrate the existence of clear processes for establishing clear goals and values? • Illustrate his/her current progress through objective measures of the culture? • Identify the learning he/she has made in trying to establish clear goals/values, and show how he/she has modified his/her approach through this? 	<p>It is often the case that when you ask the members of a department what their objectives and priorities are, you will get as many different answers as there are people.</p> <p>The answers may not be significantly different, and the general gist of them might go along very similar lines. However there will usually be distinct and subtle differences, even where the manager has made some attempt to publish and communicate the departmental aims and objectives,</p> <p>And it is often these differences, not the general areas of agreement, that can use up the departments energy and enthusiasm - in issues, disagreements, different priorities etc.</p> <p>It is rarely enough to write out the objectives, hold a workshop, and stick the results on the wall or in a memo. For objectives to be powerful enough to direct the full energy of the department in a consistent and shared direction they have to become part of the day-to-day fabric of the department. They have to be explicitly and regularly repeated in explanations, rationales and routine. In this way the "Why" we do things is clear and explicit, and it isn't filled in individually by each of us separately, subconsciously - by different people with different histories and perspectives.</p> <p>But words are not enough in themselves. They get drowned out by the actions we see around us. If person 'A' who 'toes the line' is not recognised while person 'B' who doesn't, gets a promotion - then toeing the line becomes clearly not the sensible thing to do.</p> <p>The manager needs to understand exactly what behaviours are seen to be valued, and how. And then he/she needs to determine how these differ from the behaviours needed to support the goals, and to change the value set (who gets rewarded and why) to support this.</p>	<p>Clearly there needs to be an explicit and precise definition of the objectives, and goals of the department. Ideally these should be SMART:</p> <ul style="list-style-type: none"> • Specific - clearly defining the scope and detail of what is to be achieved • Measureable - with clear measures of progress in place & regularly reviewed • Agreed - understood and accepted by the department as a whole • Realistic - with the resources and plans that give confidence that the goals can/will be achieved • Timebound - with clear delivery dates and milestones <p>These goals need to embrace all of the key functionality of the department, and they need to be demonstrably linked to the company goals - and the OGSM clearly helps to assure this.</p> <p>However this is only part of the answer. These objectives need to be clearly in evidence as a reminder of their importance to the department. Examples of this would include:</p> <ul style="list-style-type: none"> • Prominent displays of the objectives/goals/targets & why they are important • Up-to-date displays of progress (measures) against the objectives • Personal and team objectives are clearly linked to the department objectives • Regular progress reviews against the objectives • Proposals, new initiatives and all management communication, reference the objectives in their reasoning <p>The departmental objectives, and peoples behaviour toward the pursuit of them should clearly be a major and explicit part of the appraisal process</p>	<p>The preceding column largely reflects the mechanics of ensuring active goals and targets for the department.</p> <p>However, managers who are passionate about ensuring that their department is actively embracing and pursuing the goals are likely to take these a stage further.</p> <p>One clear step that they are likely to take is the local use of QFD to deploy the departmental objectives down into the separate sections/ processes of the department. This helps to ensure that there is a clear alignment between personal goals and departmental goals.</p> <p>Such managers are also likely to understand that there is a world of difference between an objective written on paper and an objective written on someone's heart, and that it is the latter that counts in the end. Because of this they will endeavour to keep informed as to what is important to their people, and how the current situation and culture impacts that.</p> <p>They will then use this information to adjust the culture, and the reward system to ensure that the pursuit of the objectives is important to their people.</p> <p>This is far from straight-forward, and thus requires a regular programme of group and individual discussion to assess the impact of the manager's strategy.</p> <p>The evidence that this is in place is likely to include:</p> <ul style="list-style-type: none"> • A written (published) behavioural standard for the department • Assessment of the culture & perceived departmental values, and an analysis of this against the above standard • A list of current behavioural issues in the department and a clear strategy to address them

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<p>There is a clearly defined strategy for using challenges and training to develop the competence of the department, and performance against this is measured</p> <p>There is clear evidence that the Mgr has coaching plans and records for his/her direct reports and regularly coaches them in the development of management skills and attitudes</p> <p>Can the manager:</p> <ul style="list-style-type: none"> Explain clearly why he/she is trying to develop the ability & attitudes of his/her people? Specify SMART performance targets for what he/she wants to achieve by this? Show evidence of involving his/her people in cascading competence through coaching etc.? Demonstrate the existence of clear processes for developing his/her people? Illustrate his/her current progress through objective measures of the competence? Identify the learning he/she has made in trying to grow the competence of his/her department/people, and show how he/she has modified his/her approach through this? 	<p>Too often the words 'training' and 'development' are used interchangeably.</p> <p>The problem in this is that when managers think of development for their people their minds often tend first toward formal training courses.</p> <p>Such courses are often important for personal insights and networking, but they are far from the whole story.</p> <p>If we think back to what has made us most effective in the tasks we do, it is more often than not through experience, advice, observation, and guidance. But this is often nowhere near as well organised or structured as the formal training courses.</p> <p>This does not have to be the case, but it is likely to remain so for as long as the manager thinks of training and development as the same thing.</p> <p>The alternative is for the manager to determine the competence growth he/she wants in his/her people, and to plan to achieve this by:</p> <ul style="list-style-type: none"> exposing their staff to a series of planned challenges and new situations/roles ensuring the advice and support are available, that they can most efficiently develop the required skills <p>In practice this does not happen in the best or most effective way by accident, but by the manager matching their peoples growth needs to the improvement opportunities that are likely to arise in their department.</p> <p>In this way the manager can achieve a balanced strategy: ensuring that the problems and issues that arise are used in the optimum way to develop both departmental performance, and personnel competence.</p> <p>Such planning will ensure that the advice and guidance is not ad-hoc, but is provided at the optimum time through a carefully considered coaching programme.</p>	<p>The barest minimum that should be expected of a modern manager is an active and agreed development plan for each of their direct reports - normally as part of the appraisal process. The plan should clearly define the training courses and planned role development for the individual over the coming year. Ideally it will consider a variety of mechanisms:</p> <ul style="list-style-type: none"> Training courses/seminars Secondment & visits Reading plans & self development Team/project involvement <p>However such 'good intentions' are no guarantee of an effective delivery, and so the manager should maintain an analysis (probably as a graph) of his/her achievement of those plans over time. This should be linked in with a strategy to address the issues in delivering such plans.</p> <p>There should also be an analysis of the growth in competence of departmental staff over time. The extent to which the department grows good people for the company's future performance is a key, but much overlooked aspect of management performance. Such growth however should not be confused with a growth in departmental competence, since there may well be an economic maximum for this.</p> <p>With specific regard to the manager's direct reports there should be plans to develop the systematic approaches outlined in these pages as a skill set for any who have a management role.</p> <p>This will require that the manager agrees development needs with each of his reports based on an analysis of how systematic their approach has been, and then supports this through a programme of personal coaching. This should be evidenced by an up-to-date coaching plan and records of coaching activity for each subordinate.</p>	<p>To the manager who is passionate about people development, every challenge or issue identified in the department is an opportunity not only for performance improvement, but for developing the potential and competence of his/her people.</p> <p>Such managers will develop a comprehensive strategy, which starts with them thinking through the vision for their department and the skills, and attitudes they need to develop and maintain it.</p> <p>They will supplement this with ideas on succession planning and ensuring sufficient flexibility to avoid any vulnerability to people moving on from the department.</p> <p>They may even include ideas on the quality of people they want to nurture in their department for future outplacement in other departments.</p> <p>And they will pull this into a development map of what is needed for whom.</p> <p>They will then look at the challenges and opportunities that are likely to face the department over the coming months, and what they need in terms of skills, and offer in terms of experience.</p> <p>By combining this with the development map, and using the possibilities presented by teamwork, team roles, paired working, coaching, leadership, facilitation and training they will plan how the future work of the department will result in both process and people improvement.</p> <p>In achieving this they are likely to use a number of tools:</p> <ul style="list-style-type: none"> Self-Managed Workgroups to build management skills Team self-analysis, and meeting analysis to improve team processes and interpersonal skills Development Leadership to plan carefully the best development paths for their people

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<p>Key business processes are well defined, and in control. Up to date maps or schematics exist, there is clear guidance for those working in them, and there is recent audit data</p> <p>There is clear evidence of project work to systematically improve process performance and quality. Performance is monitored and Problem Solving Processes used to address issues.</p> <p>Can the manager:</p> <ul style="list-style-type: none"> Explain clearly why he/she is trying to implement process management in his/her department? Specify SMART performance targets for what he/she wants to achieve by this? Show evidence of involving his/her people in mapping and managing process performance? Demonstrate the existence of clear processes for managing his/her operating processes? Illustrate his/her current progress through objective measures of process development? Identify the learning he/she has made in trying to establish process management, and show how he/she has modified his/her approach through this? 	<p>Schematic graphical representations of what is supposed to be happening are the key tool of most objective professions. Examples of this would include architects plans, circuit diagrams, software flowcharts, pipework/process schematics, engineering drawings, etc.</p> <p>These schematics are used whenever change is considered or problems need to be understood, because they help people to think through the implications and consequences. This is especially true when such thinking is being undertaken by a group, because the schematic is especially helpful in explaining one person's reasoning to another.</p> <p>Business lends itself to such schematics. The processes by which business is undertaken can be mapped in terms of flow diagrams, and this has proven invaluable to company after company that have endeavoured to improve their performance and become world class. Additionally the thinking that has to go into the first development of the flow diagram forces those in the process to think through & resolve many issues, inefficiencies and confusions that naturally arise in unmapped, uncontrolled processes.</p> <p>Unfortunately the difficult task of thinking through the process tends to deter people from undertaking this work - and they cite many reasons for avoiding it: complexity, variability, etc.</p> <p>The map is the main vehicle however for ensuring that:</p> <ul style="list-style-type: none"> People follow the proven and optimum path There is a basis for defining and redefining the ideal Deviation can be identified and its consequences evaluated Performance issues can be tracked back to operational defects Improvements are maintained over time 	<p>There are a number of activities that a manager can undertake to begin to get his/her business processes into control.</p> <p>The first step would be to define clearly the interfaces of their department - what its role and scope is, the boundaries between it and adjacent departments, and what is delivered across those boundaries. By evaluating the department's role in these terms he/she begins to define the department as a whole as a process, and can begin to develop and improve it accordingly.</p> <p>The next step would be to develop a logical model of how the department fulfils its role, & how its activities group into logical processes, each of which fulfil a key function of the department. Once again the boundaries and scope of each process with respect to the others would be defined, and the deliverables or performance of each process.</p> <p>There should be an overall schematic of how these processes link together and the flow of information and work between them. And ideally this schematic should be taken down into more detail for each of the individual processes, showing how each activity in the process links with the next. This is called a process diagram.</p> <p>But such information is worthless unless it is used to actively improve and guide the way the department works. For this reason you would expect the following evidence in any department that is taking process improvement seriously:</p> <ul style="list-style-type: none"> Process maps readily accessible & used to guide people in the process Records of PSD projects to improve the process & updates to the map. Minutes of Process management meetings to review its operation 	<p>All of the evidence in the foregoing column is largely introspective.</p> <p>A manager who has a real passion for process improvement is unlikely to be insular in their perspective, and there will be evidence of the team looking outside their own department to learn from the experiences of others.</p> <p>Examples of this would include:</p> <ul style="list-style-type: none"> Representation on bodies with a shared interest in improving the process A library of literature and papers on the process, and other similar activity Reports of visits to other similar processes, conferences etc. Benchmarking activity, comparing the process map with world best practice <p>But the manager is also likely to have pursued the local implementation of the process with more rigour too, resulting in evidence of:</p> <ul style="list-style-type: none"> Process QFD breaking the process into manageable subprocesses & measures Records of recent audits of process operation Process quadrant charts Models of process behaviour to simulate the effect of improvement ideas A schedule of regular process review meetings with minuted improvement actions The use of process thinking tools such as the 7 Management and Planning tools <p>The final irrefutable evidence would be the extent to which the manager addressed all issues raised to him/her in terms of the relevant process and how it is being systematically addressed.</p>

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<p>There is prominent visible evidence of the measurement and trending of current performance in all key areas. Quadrant charts are well used and result in clear improvements.</p> <p>There is evidence that the quality & availability of information is regularly audited, & reviews regularly used to analyse weaknesses and improve the quality of future decisions</p> <p>Can the manager:</p> <ul style="list-style-type: none"> • Explain clearly why he/she is trying to implement a comprehensive system of measurement? • Specify SMART performance targets for what he/she wants to achieve by this? • Show evidence of involving his/her people in establishing and operating the measurement system? • Demonstrate the existence of clear processes for measurement? • Illustrate his/her current progress through objective analysis of how measurement has moved the department forward? • Identify the learning he/she has made in trying to establish measurement in the department, and show how he/she has modified his/her approach through this? 	<p>Measurement is probably the single most potent factor in ensuring business improvement.</p> <p>Jan Carlzon the CEO of Scandinavian Air Services said "An individual without information cannot take responsibility; an individual who is given information cannot help but take responsibility".</p> <p>The mere act of feeding someone with information on the performance of their work makes them responsible for that performance - and companies have demonstrated this time and time again whenever they have established clear performance measures: "What gets measured, gets done".</p> <p>In part this may be why people fight shy of implementing measures - the sheer power of them in establishing responsibility appears to take away freedoms that the individual values: freedom from challenge; freedom from having to justify; freedom to follow what interests us; freedom to be lazy; freedom to avoid or shortcut our responsibilities.</p> <p>All of a sudden our reluctance to face issues, or to learn from past problems is exposed, and we have to do something about it - however much we would prefer to ignore it. Measures force us into our own top box. They are the very essence of a systematic approach to management.</p> <p>And with the discipline of measures comes the discipline of problems solving. It is no longer enough to think you've solved the problem - the measures will clearly demonstrate where we haven't - and so we need to be rigorous in ensuring our problems are clearly identified and solved.</p> <p>The main tools to achieve this are the Problem Solving Discipline (PSD) and the Post Implementation Review (PIR), each of which may be supported by a wealth of simple problem solving tools which ensure that the facts of a particular situation are clearly identified and addressed.</p>	<p>The minimum that should be expected of a manager that is endeavouring to manage systematically is that he/she measures the performance of their department in terms of its key deliverables:</p> <ul style="list-style-type: none"> • Rate of work output • Deliverable quality • Deliverable timeliness • Customer satisfaction • Unit cost / efficiency <p>These measures should be reported regularly (probably by monthly period) into a management meeting where performance and trend issues are identified, analysis undertaken & actions agreed.</p> <p>The measures should ideally be plotted on a graph, against the target performance that is to be achieved, and the graphs put on display.</p> <p>As the management team grapple with the top level measures, and work to understand and address performance issues, they will inevitably identify Critical Success Factors (CSFs) and will begin to establish lower level measures to enable them to keep these CSFs (and the processes which deliver them) in control.</p> <p>As this work continues you should expect to see evidence of:</p> <ul style="list-style-type: none"> • graphed measures for all the critical functions of the department • meeting minutes in which measures are reviewed • use of problem solving tools such as Ishikawa, Pareto, Forcefield, Selection matrices, histograms etc. to analyse and solve performance issues • documented use of review and PSD processes <p>And as a check that all this is being used properly you should expect to see evidence of performance improvement.</p>	<p>A manager with a real passion for measurement and analysis is likely to spend a considerable amount of time thinking through what he/she wants from their information system and designing it to achieve exactly that.</p> <p>They will develop the logic of a hierarchical system of measurement, and ensure that the flow of information to each position is the optimum to drive responsibility and support decision-making.</p> <p>They will ensure a balanced (scorecard) type approach to their measurement and reporting, and will make extensive use of analytical data in their knowledge management and risk management processes.</p> <p>It is likely that there will be an extensive use of IT to support this.</p> <p>The primary reporting system is likely to be a quadrant chart type of approach, and these will be up-to-date and on prominent display in the process areas.</p> <p>The information system will be regularly audited to assess its effectiveness and efficiency in driving and supporting timely and accurate decisions, and the results will be used to refine and hone the system.</p> <p>There are almost certain to be several versions of the PSD available, depending on the type of problem being addressed, and its use is likely to be led and coached by management.</p> <p>Concepts of information and learning are likely to be considered regularly, and books and papers on the subject will be available.</p> <p>There may also be evidence of the use of sophisticated computer models linking measurement data and analysis to second order tools such as Artificial Intelligence and Taguchi etc.</p>

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<p>There is regular seeking of ideas and solutions from outside of the department, and clear evidence of their evaluation and implementation into the practices of the department</p> <p>There is a clear mechanism for seeking & encouraging improvement at all levels of the department, and evidence of active promotion of the concept of continuous improvement</p> <p>Can the manager:</p> <ul style="list-style-type: none"> Explain clearly why he/she is trying to establish a culture of continuous improvement? Specify SMART performance targets for what he/she wants to achieve by this? Show evidence of involving his/her people in thinking through ideas and improvements? Demonstrate the existence of clear processes for driving continuous improvement? Illustrate his/her current progress through objective measures of improvement? Identify the learning he/she has made in trying to establish continuous improvement, and show how he/she has modified his/her approach through this? 	<p>"Why in all the plenitude of God's great universe do you choose to fall asleep in this small dark prison?" RUMI</p> <p>The primary concept and purpose of systematic management is to free management thinking from the routines and responses that trap it in the bottom box.</p> <p>The principles are intended to free management to look at the big picture and redesign its structures to make them less of a prison, and more of a control centre.</p> <p>But "the price of freedom is eternal vigilance"</p> <p>The very structures you design today could become your prison tomorrow. Devices that save your thinking can lead you into blind obedience and unthinking acceptance, and before you know it you are back where you started.</p> <p>Having lifted yourself into the top box you will quickly discover that it can very soon drift into becoming the bottom box, and the more you let what happens there become routine, the faster this will happen.</p> <p>The alternative is to continually redesign the management frameworks to meet the changing needs of the department and its management.</p> <p>There is plenty of material to help you in this process - in books, papers, seminars, journals, other companies, customers, suppliers, the ideas of your own people, study groups, think tanks, consortia etc.</p> <p>It is only by remaining alive and awake to the constant stream of opportunities these things provide that you will prevent your current solution to systematic management from becoming your future issue that systematic management needs to solve.</p> <p>Even the top-box has a top-box!</p>	<p>The principles of systematic management form a system of continuous improvement in its own right, and the minimum that can be expected of management is that there is a continuous pursuit of continuously increasing performance targets.</p> <p>However, there should also be some strategic thought behind this, and a process of learning from what has happened.</p> <p>The evidence that is expected of a manager who is seriously trying to adopt a culture of continuous improvement in his/her department is likely to include:</p> <ul style="list-style-type: none"> A workshop in which the role of the department is reassessed, and clear performance targets are defined. These should be stretching and represent either an improvement in performance or in costs A prioritisation of improvement areas in terms of the processes that need to develop, and the projects required for improvement. These should be practical in terms of the workload and resource limitations. Regular meetings to monitor progress and address issues A final in-depth review of progress, and a comprehensive audit of the current situation in the department <p>The final review and audit represents the last point on the cycle. The findings are taken into the first point on the subsequent cycle where the information is used to determine the departments improvement needs.</p> <p>Evidence that such a system was defined, in-place and currently pursued would include the scheduled dates of the events, and the audit results of the last cycle.</p>	<p>Managers who have clearly grasped the concept of continuous improvement soon discover that the very processes of continuous improvement can themselves be continuously improved, and that is like catching a TV set in the lens of its own camera.</p> <p>Once the vast majority of basic improvements have been made in the operating processes, the unsophisticated processes of improvement that the department started out with begin to lose their effectiveness.</p> <p>The more pedestrian manager will wrongly assume that this is because there is little more improvement to be made.</p> <p>The continuous improvement zealot will rightly assume that this is because the process of improvement itself needs to be improved.</p> <p>In response to this they will develop a more proactive approach to continuous improvement - looking outside the department with projects to identify and assimilate best practice. There will be clear, fresh evidence of having looked for and evaluated practices originating from outside the department.</p> <p>It is likely that they will also have evidence of exploring business excellence models, such as Baldrige and EQA.</p> <p>There should also be evidence of their involvement in groups which meet to review best practice and promote its implementation (an example of this would be the presentation of thought leadership to the ISD board)</p> <p>Finally there would be clear evidence that they were working to promote this same approach throughout their department, eg through involvement in external study groups, and involvement in Hoshin Planning which cascades the improvement needs through the department.</p>