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Taking Time to Measure

How Bonnie Kite helped the Bulk Water Division in Sydney Catchment Authority to take the time to measure.



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STACEYBARR

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Stacey Barr:

Hello and welcome everyone, I am Stacey Barr, the Performance Measure Specialist and your host for our Measures and More Mastermind Program. You are on our August 2008 Case Study Call and this is all about how Bonnie Kite is helping her division to take the time to measure.

Getting your organization, really interested in performance measurement can be hard enough, actually getting them to commit time to do it, that is another thing entirely especially when it is over and above all the 'real work' that they are doing. It can be such a feat, just to get people willing to give some time to developing measures and to reviewing measures and the like. I know a lot of you are struggling with that very problem.

You might feel very committed to doing performance measurement well and you may even know what steps you want to follow and how you want to go about doing it, but you also know that you just have to have the collaboration and the involvement of your colleagues and managers and others in your organization, if you are going to have any chance in getting it done really, really well and getting their buy-in along the way.

That is why I was so excited when Bonnie recently told me that she has been making some tremendous head way in her organization, particularly in getting people to follow her lead and actually give their time to doing performance measurement properly. You are going to hear on this call how the actually gave more time than they first thought they were going to and did this willingly as well.

So let me introduce Bonnie to all of you. Bonnie Kite is the Senior Improvement Officer, she is with the Bulk Water Division of the Sydney Catchment Authority and essentially, Bonnie's role is analyzing the divisional processes and performance and identifying improvements and also looking at how those improvements need to be achieved. She holds the divisional portfolios also for Innovation, Quality Management and Business Systems, Leadership and Development – so she is really a very busy woman!

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Normally Bonnie would describe her team (which is the Business Improvement Team) as the Problem Solvers. That makes total sense to me! Bonnie has a Graduate Certificate in Public Sector Management and she's been working in the Public Sector for 7 years. She is also a member of the IPAA, the Institute of Public Administration Australia – Young Professionals. Bonnie didn't always work in the Public Sector though, she has been (prior to that) working in the Pathology field in clinical trials as a Bio Chemistry Coordinator and that is where she discovered her passion for Business Process Management. Bonnie welcome!

Bonnie Kite: Hi everyone! Thank you Stacey.

Stacey Barr: I have got to ask this question Bonnie; how can you discover a passion for business process management when you are a Bio Chemistry Coordinator?

Bonnie Kite: I suppose being in that scientific arena we were very strongly focused on getting our processes right and maintaining their currency and our certification. So that was one of my primary roles there, to maintain the business systems there. So I kind of went on and followed that kind of lead and did small, little short courses on Quality of Management and then expanded out into proper roles that encompassed Quality of the Management within other organizations and yeah more recently within the Public Sector.

Stacey Barr: It is kind of interesting Bonnie, I didn't know this about you when I first met you, it is not too dissimilar a path from the one that I took into this area of performance management, because I started off as a scientist I guess (a research statistician) and got really interested in quality improvement and business improvement and process improvement and the like. So it is funny that that is just one of the pathways that people can come to, to be interested in measuring and improving performance.

Bonnie Kite: Yeah it is. I think it is that scientific background to find out 'why', 'why does that do that?' and 'why does that not work?' and that kind of thing. So yeah, I agree with you Stacey.

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Stacey Barr: Curiosity about how things work and how they can work better!

Bonnie Kite: Exactly.

Stacey Barr: Bonnie, why don't we begin with a bit of background. So what was happening ... maybe tell us a bit about Sydney Catchment Authority (SCA), I am not sure that everybody would necessarily know about your organization, but also what has been happening in your division that actually led you to decide "Yes, we need to give some deliberate attention to performance measurement now."

Bonnie Kite: Yeah sure. The SCA was established in 1999, so we are kind of a new agency and we essentially are charged with protecting the drinking water catchments and supply raw bulk water to our customers. So that includes Sydney Water, 2 local Councils and 60 retail customers. So we don't (I suppose) supply New South Wales (NSW) directly with their water, but ultimately there is about 60% of the population of NSW consume the water supplied by us. So we have a diverse background with people living in Sydney, Illawarra, Blue Mountains, Southern Highlands – we manage operations in all of those areas. And I suppose we have got about 300 staff and where I sit is in the Bulk Water Division, which is the operating arm and there is about 70 staff in our division.

So that is kind of the background of SCA, but in regards to this particular project (why we were looking at our performance measurement) was we really wanted to improve the way that we established our measures and to review our existing KPI's that we had on our Balanced Scorecard, with a view to establish measures that would be able to give us the ability to make informed decisions about how our operations were working.

Stacey Barr: Excellent. So you guys, it sounds like you already had that focus about that it really is important to monitor what is going on.

Bonnie Kite: Yeah we have, since back in '99 we have a Balanced Scorecard, the Balanced Scorecard was established back then and we had a long history of data and I

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suppose we had a review of our corporate plan and it came time to say “Okay let’s realign, or let’s take a fresh look at those measures and are they still correct?” So I suppose it was just a realignment that was the focus of this particular project, with a strong emphasis on what methodology we are going to use, rather than just brainstorming.

Stacey Barr: Okay, so that is where you shifted the deliberate attention. You always knew that it was important, but this is about ... well I guess it is almost like a process improvement initiative in its own right, about improving the process of performance measurement?

Bonnie Kite: Yes, I suppose the portfolio holder for Business Planning and Balanced Scorecard and such doesn’t actually sit within our chain, it sits with another group, but we took this on as an improvement project. So, for those of you who were looking at this and it is within your own portfolio, our view was kind of taking a step back and seeing how it fits in with the rest of the business and really build on the people that originally had responsibility for the balanced scorecard, along with the project as well.

Stacey Barr: That sounds great. So that would have maintained their ownership as well, without stepping on toes I guess!

Bonnie Kite: Yeah, correct, yep.

Stacey Barr: So Bonnie how about telling us a little bit more about what steps you actually have been taking, what you did do to review and consolidate Bulk Water Division’s performance measures?

Bonnie Kite: Yeah, sure. After I went to the November Blueprint Workshop with you Stacey and had a couple of months of “Oh my God, what am I going to do? I have got a huge task in front of me here!” So I originally set up a formal project to manage all of this, so with our General Manager as the client and stakeholders were obviously the Manager that originally had the portfolio for this Balanced Scorecard and I thought

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probably (a round about) I could do it within 2 months, which was grossly underestimated!

So started doing little small teams, picking the key players with each one of those measures and doing 1 hour workshops with them, or 1 hour meetings – I tried to steer clear of workshops. Within our division workshops are a bit of a 'no-no' and people don't like going to them and at the end there is no decisions made or anything like that. So I suppose that was one of those cultural kind of things, so I just made it short, sharp and simple, 1 hour meetings with no more than 3 people and then the other people that I thought I would need to consult on a particular measure, whether it was regarding compliance, or projects, or anything like that I kind of spoke to them beforehand and afterwards as well to see what they were thinking.

Stacey Barr: That sounds great. I actually know a couple of other people that have taken that kind of approach to 'let's not turn this into something that looks bigger than Ben-Hur by having them in the form of workshops and if you are at that stage where people are already really, really busy, just taking that nice little approach of pulling together the right people, the short meetings is ideal.

Bonnie Kite: Yes.

Stacey Barr: So in taking that approach, one of the things you mentioned was just scheduling 1 hour meetings with people to start with and you also mentioned that you had originally hoped to have this done in a couple of months and I know that that didn't quiet work out that way!

Bonnie Kite: No, no.

Stacey Barr: Tell us more about how much time it did take and how much time people did give and realistically, what were the factors you think that affected that time?

Bonnie Kite: Oh okay. Firstly we are looking at the review of 25 measures, existing measures and on top of that I was also looking at our own team measures, which some of them overlapped. So there is probably around about 10 of those, so in total there was 35

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measures that I was either looking at to say “Do we need to keep them?” or “Do we want to reconsider them?” or “Are they mandatory?” So in total there were, say 35 of those. I originally thought 2 months, but now we are into the 4th month of this whole review process. So if I had my time again, I would allocate a good 6 to 8 months for it, to have everything rolled out properly including, from the get-go of: what are we trying to measure again, what was our original intended outcome, having those key discussions and clarity of what our intended outcome means, right through to the reporting requirements and getting the data activated as well. So that is kind of the time frame that I am heading now.

Stacey Barr: And the scope of what you described that you are covering right at the very beginning ‘what are the outcomes that really matter’ through to the very end ‘actually reporting the measures’ and bringing them to life (so to speak), that is a much broader scope than any kind of brainstorming session could possibly accomplish.

Bonnie Kite: Yes, correct. Yeah, yeah. Which I suppose within that 6 to 8 month period was also including in that my own learning and understanding of the methodology that we are using today Stacey. So if I kind of already had that training embedded it would be much quicker, so anticipate next time we do this, or next time our corporate plan is reviewed it would be much shorter.

Stacey Barr: That makes a lot of sense. I mean you were introducing an improvement to the measurement process and people are doing things in ways they hadn’t done them before I guess.

Bonnie Kite: Correct, yeah.

Stacey Barr: So I guess how would you summarize the main factors that influenced the time that it did take? One you have said already was ‘the learning’, there is a learning curve and some practice associated with that. What are some of the other factors that you think made the time take longer than your few months?

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Bonnie Kite: The key discussions around the 1-2 hours, I thought I would only need maybe 2 of those to review 1 measure (for example) right from the get-go right through to 'how is this going to look and how we are going to activate the data' so to speak. But they took a lot longer, those meetings were ... one particular one went from my scheduled 1 hour and actually went to 4 hours and that was because participants wanted to keep going and they wanted to investigate further around "Well we have never had this conversation before." or "What do you think?" and "What have we done in the past?" and that kind of thing.

So I underestimated that kind of timeframe and then I suppose the other too was any new measures that are kind of being put together, just doing some background on any existing data, or how are we going to pull/extract that data out of any other systems, or excel spreadsheets, or whatever we have got going. Yeah, so compiling all of that together.

Stacey Barr: It is hard to anticipate how much time that stuff is going to take in advance I guess.

Bonnie Kite: Yes, yes.

Stacey Barr: Particularly ... and I found this just over a week ago I was facilitating a Results Mapping Workshop with a client and that workshop is about like what you've said, talking about what are the outcomes that really matter? What are the things that we should be developing measures for? And those conversations always blow me away, I find them quite hard to facilitate actually, because people just want to go for it. They say things like "Wow we have never talked about this before!" and they are debating what results matter and what that language means and which bits are worth measuring and what do we leave out – and they really do end up having this energy to want to give time to it I guess.

Bonnie Kite: Yes, I kind of thought that I would need to put on the tea, coffee and cakes and what not to get them in, but in the end I didn't have to do any of that, they more than willing and said "Okay, well lets keep going." Even right up to Senior Group

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Managers where obviously they are very tightly scheduled, they were dedicating more time to it.

Stacey Barr: That is probably a really important takeaway point, already so early in our call today; is as a tip for people is if you really want to get people to give time to measurement and you are struggling at the moment to get them to come along to workshops, I mean what Bonnie has done is amazing, it's just set up small meeting of an hour or so, which is quite digestible to a lot of people "Yep, no worries. I will come and spend some time for an hour with you guys and talk about what the most meaningful measures are." But then let them decide how much more time they want to invest into it. Invariably we find this happens, is that people do want to give more time than they believe they want to up front, or they will often give more time than they say they will have available up front!

Bonnie Kite: Yeah, correct, yeah and I suppose then knowing that our client was the General Manager and ultimately that these measures were going to go on our balanced scorecard, which is very highly scrutinized, that gave it the (I suppose) the importance to it as well.

Stacey Barr: That backing ...

Bonnie Kite: Yeah.

Stacey Barr: ... is quite critical, yes absolutely. So how did you find those conversations around getting the results really clear? Were there any tricks that you had learned about how to get people to engage in those conversations and have the kind of dialogue that was really necessary I guess, to help them understand the results and get ownership of the results and the measures that came out of it?

Bonnie Kite: For some of them I picked the people that would probably respond to doing some pre-reading, some of the articles you have written Stacey 'Are You Measuring What Is Worth Really Measuring?' those kinds of things, or 'How Did You Establish Your KPI's?', 'Did You Use Brainstorming?' Those kinds of little hooks, I sent them out beforehand and said "If you have got 5 minutes before the meeting, would you mind

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casting your eye over this article?" Just to get them in that mode. I also sent out to some people a little proforma saying "What do you think you get paid for?" and "Which one of our strategic outcomes do you think contribute towards?" and "If you could re-write that strategic outcome, what would you want it to say and how would you want it to look?" So I had those kinds of leading questions, so they could do that thinking prior to the meetings. So when I met with them, they were already in that mode of "Oh okay, we are serious, we are really looking at our measures." and I can envisage in 12 months time that I am going to be in a meeting room somewhere saying "Yes we achieved this and this is how we did it." and that kind of thing. So I suppose that is how I prompted the ownership issues.

Stacey Barr: That's good. That proforma, can you repeat those questions you had on it? The first one was ...?

Bonnie Kite: (1) What do you think you get paid for? That was pretty gutsy to write down; I must say I gave it to my boss first! I suppose one thing I haven't mentioned through this whole thing; I used our team as a test case for all of this. So anything that I ran through the division, I ran through our team first and they would say "Oh, no I don't like that!" or "I don't understand that." So without their support and feedback, I don't think I would have been able to role this out amongst the divisions as well as I have been.

Stacey Barr: Almost like a pilot test.

Bonnie Kite: Yeah, yeah, we had our little pilot group. So I got them to answer those questions as well and they were very good about it and said "Oh yeah I get paid to do this." and "This is the one that I contribute towards." and then they actually answered those individually and then brought them to the room. So it was interesting to see people within the 1 team, what they thought they got paid for. So the people that were on a different wave length were ... it was very obvious who those people were.

Stacey Barr: That's interesting. I just had a thought, when people brought the answer to that particular question 'what do you think you get paid for' and they brought that into

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the discussion, what did you find about the patterns in what they said? How many of them wrote down activities on that list of what they get paid for as opposed to writing down results or impacts, or differences that they make?

- Bonnie Kite:** I suppose most of them were outcomes, because I had a little example there at the top of it. So they were outcomes and I didn't send that to everyone, because I knew that wouldn't go down with some people, but the things that they did write on there, yeah were often outcomes that were big ticket items, like 'run this group' or 'deliver water' or 'manage our dams' and that kind of thing and then the next question down was (2) Which one of the strategic outcomes do you contribute towards? Most people listed about 3 and the next question below that was (3) If you could re-write this, what would want it to say? I suppose with us we have a bit of ... in our corporate plan it is very air-fairy, I know a lot of plans are like that, but I really wanted to get clarity what those intended outcomes meant to people, which then rolled into the Results Mapping.
- Stacey Barr:** Yep. So when you say 'airy-fairy' Bonnie is that what I would term like 'weasel words'.
- Bonnie Kite:** Yes, correct, yeah.
- Stacey Barr:** So efficient, effective, productive, enhance ...
- Bonnie Kite:** Correct. Yeah well what it means to me might mean something totally different to someone else.
- Stacey Barr:** Exactly, yeah. It is very hard to figure out what the right measures are when we don't have a shared understanding of what the words mean. So that was pretty clever to get them to re-word it in their language.
- Bonnie Kite:** Yeah, well I suppose we used that ... we actually re-worded on our final balanced scorecard. Some of them we have actually used their wording so that they can see where they fit in.
- Stacey Barr:** So you did go back and change the actual language in the Balanced Scorecard, some 'air-fairy stuff' to more specific language.

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Bonnie Kite: Yep, correct.

Stacey Barr: Oh, cool.

Bonnie Kite: Like, one example is 'We make our customers, stakeholders and regulators happy' and previously it was something like 'We have strategic alliance ...' that kind of thing. So people now look at that and say "Oh we make our customers, stakeholders and regulators happy – Oh I know what that means!" So, yeah.

Stacey Barr: It is much better. It is a very powerful thing to do and a question I often get asked from people is you know, like once you have ... you have to untangle all those weasel words or that air-fairy language to end up with meaningful measures and they are never quite sure should they go back and change those words or not and I guess it doesn't really matter whether you do or not, but it is nice to know Bonnie that in organizations like yours, people do go back and change what is said in those documents.

Bonnie Kite: Yeah well, I thought there was no point in doing it otherwise and I suppose then if that is another ownership thing as well, that they can say "Oh okay, I can see where I fit in here."

Stacey Barr: Yeah, line of sight.

Bonnie Kite: Correct.

Stacey Barr: I like that. You didn't have a great deal of problem in getting engagement from managers and leaders, did you? They already had the balanced scorecard and already understood the value of it. Did you have to do any work to kind of stir more interest amongst organizational leaders to get from outcomes to better measures?

Bonnie Kite: Yeah in some areas I did and I suppose I did that by selling it to some of our Group Leaders as saying "This will give you evidence to show where you fit in, in our corporate plan." remembering that this is at a divisional kind of level and also saying "That you can use this as your own report card to our General Manager." and to

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really investigate further on areas that they have always wanted to know more about. So they were the kind of hooks that I used there and of course running it as a project and with our General Manager back in ... I suppose that is one of our leadership issues.

Stacey Barr: That is an important thing, is that backing, absolutely. Okay cool. That is a pretty good overview of the steps that you took and you shared some really great tips along the way of how you ... those hooks that you talked about to get people thinking in the right way about results and measures. When you were going through those steps Bonnie, what kind of challenges, or failures I guess did you have to meet and deal with along the way?

Bonnie Kite: I suppose I have already touched on 1, which was the time issue. I really underestimated the time that I thought this was going to be achieved by and I have managed to re-jig it, though I was hoping to role our new balanced scorecard out for this financial year, but obviously haven't met that time frame, but it will be first reported in December this year. So we are still able to collect the data for this financial year and it will just be first reported in December. So I have made up time that way, it that way it is not ideal, but that is kind of our plan B and the other challenge that I had, which was the Results Mapping, not only was it a new technique for myself, but then trying to explain that to other people as well.

So I found that I almost had to do a Results Map first, before I went out to some of the teams that I had to facilitate that for. But I suppose that once I had done 4 or 5 of those and using our (or my) team as a bit of a pilot group first, that really helped hone in on that skill. So they are the 2 major challenges that I had there.

Stacey Barr: On the Results Mapping one, you mentioned that you had to do one yourself first, what was the benefit of that? Was that more about making you confident, or was that about giving others a starting point, or ...?

Bonnie Kite: No, I never really showed them that one. I suppose it was my own confidence and getting clear in my head, I will take one for example that we were looking at 'projects

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delivery'. We have 2 teams that run major projects within our division and those teams have never really spoken too much before on what it means to make a project successful, what are the outcomes they are aiming towards to ensure that each project that they run is delivered on time and within budget. So I kind of did a mini Results Map beforehand, just trying to think of some things that they might come up with and also maybe as some prompters if we got stuck. But Steve Haughton (my Manager) he also went to that Blueprint Workshop as well, so we both were kind of working through that together. So having another sounding board saying "Oh, are we on the right path here?" always helped me through that to.

Stacey Barr: On the time thing, about it taking longer than you had planned, how did people feel about that do you think?

Bonnie Kite: What having to stretch the meetings out, or not hitting the ...?

Stacey Barr: Yeah, not hitting the target of having it done by the financial year. Did people feel disappointed by that, or did they ...?

Bonnie Kite: I suppose it was my own disappointment more than anything and then I just had to come up with other ways of how to get it back on track. And I went back to our General Manager and said "Look we are not going to meet this original target that we had thought, these are some options, what do you think?" and he kind of said "Well we are getting the data anyway, so we can just back track that data." He was fine about it, he was more focused on getting the right measures in place, rather than hitting the time frame.

Stacey Barr: Hmm, I think he has got his priorities right.

Bonnie Kite: Yep.

Stacey Barr: It is too easy to rush to have a report done by a particular time when what is in the report really doesn't mean anything!

Bonnie Kite: Yeah, correct.

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Stacey Barr: Okay, so how about successes then Bonnie? What do you think worked particularly well for you in this process? What kind of impact has it had in the end?

Bonnie Kite: I suppose having a methodology that we can follow, rather than just trying to come up with something ourselves or getting the best of a bunch of ideas. That has really worked well and to say that it's a method that we have been trained in and obviously have got your ongoing support Stacey in rolling it out as well, that has really been beneficial for us as well and getting some quick wins on the board as well, with our own team measures. We have put a bit of a storyboard together and went around to the team and said "This is how we designed this measure." and went through all the steps, so they could see what the final outcome was.

Stacey Barr: Tell me more about the storyboard?

Bonnie Kite: I just kind of put together, just from the very first step that we did, which was the little proforma that I sent out, which was "What do you think you get paid for?" kind of thing, I just used one complete example that we did to design a measure for ... I think it was about 'staff training', because at the moment (well, previously I should say) we had a measure about 'the number of days staff had been trained in' and Jennifer Nolan, another lady in our team gathers the data religiously every month for this particular measure and we say "How many days have people been trained in this month?" and "How many days have they spent off-site doing training?" and so forth and we report that every single month and we don't do anything with it.

Yeah! This is one of the ones that we really wanted to fix up, so I thought that was a measure that everyone had seen for the last 5 years and they knew what that meant. So I picked that one and I said "Okay, this is how we re-designed it." And I just got photocopies of the little proforma that I used and the Results Map and the Measure Design and Definition Templates that we had all filled out and just put it onto a board and I said "These were the steps and this was our final measure that we came up with." Which in the end, was about the percentage of training that they had completed in their Learning Agreement. We have a Performance Management

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system here where every year you sit down with your Manager and you say "This is the critical learning that I have got to under take this month to meet my obligations and this is my essential learning that I would like for personal development." So we are going to start measuring how much of that they have actually completed. So we thought that was a much better measure to look at that we have the right skills in the workforce, rather than people are trained.

So I just put that in a storyboard, like there was a board and walked around with and said "This is how we kind of got to this result and now we are going to do the same for you guys. This is the one that we are going to look at." whatever particular measure I was looking at that day.

Stacey Barr: I haven't heard of anybody using a storyboard, maybe people are doing it, but I haven't heard that before. I think that is such a cool idea, it is so tactile, it is there in front of it, you can touch it.

Bonnie Kite: Yeah, well I use it instead of the Measure Gallery. Being across 4 different sites, I thought I would have to move that Measure Gallery 4 times and I didn't really want to, I suppose go to all that effort in setting it up and getting feedback formally. I am not sure if your listeners know what a Measure Gallery is, or if you have spoken about that on previous calls Stacey, but ...

Stacey Barr: Some probably will, but there will be people that don't, so maybe we should give a brief summary.

Bonnie Kite: You can explain it if you like Stacey.

Stacey Barr: Oh okay. A Measure Gallery everybody, is what we do when we are at a stage where we think we know what our new measures are going to be, but what we want to do is get wider input and buy in. People that haven't necessarily actively participated in the creation of the new measures, or the definition of them, we usually hire a room or use one of our conference rooms and put up all of the Results Maps, the Strategy Documentation, new Measure Designs, all that sort of stuff on the wall and just invite people to come in and walk around at any time they want to. Stay for as little or as

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long as they want to and use post-it notes basically to stick up ideas about how a measure could be improved, or did you consider this, or I like that measure, or I don't like that one. So they are really having input and giving some critical feedback to the team that develops measures, but also it is an opportunity for those people that come to the Gallery to see and understand what that measurement process is, it is quite a 2 way kind of process. That storyboard is just this mini version of a Measure Gallery road show!

Bonnie Kite: Yeah, essentially, yeah and I suppose walking people through the processes, well like you said so the educational tool.

Stacey Barr: Yeah, it's great. So we were talking about successes Bonnie. Are there any others you want to add to your list?

Bonnie Kite: I suppose the final product, which is the new set of measures that we have got on our scorecard, I believe they will give us a real better understanding of what is happening and much better feedback to be able to make decisions on if we need to improve operations or whatever it may be, we need an improvement project here or look how well we are going here and linking that to recognition as well.

So I suppose that is a really good outcome and the feedback that I have got so far is people are very happy with these measures. So they are kind of excited to see how they are going to look in real life. And the conversations about what our outcomes really mean, I thought that was a major success in some areas where they never have had those conversations before, even though you thought they might have, obviously though they hadn't and I suppose that then gave even more support to this particular process Stacey. So to me that was a really good outcome.

Stacey Barr: Tell me more about those conversations, why do you think people haven't ever had those conversations before? What is different about the conversations that you helped them have?

Bonnie Kite: I think being able to give them the power to re-write the intended outcome if they could and say "Oh okay, if I wanted to re-write it I would make it say this." and I put

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some little rules around that as well, I kind of said “Well you know, no weasel words, it has got to be outcome based, not activity based or process based.” that kind of thing and I think that then gave them more ownership around actually achieving the outcome. And then from there I think they just were more interested in it.

So I suppose it just sparked more conversations around “Well what do we do to achieve that? What are the key items that we do to make sure that that happens?” So the like the projects one, they were talking about “Okay, we have always looked at percentage of variance from our budget.” but as a result of those kind of conversations, now they have established some measures around the project scoping, because they realize that if we don’t get this right first, then the project is going to fall over and ultimately we won’t meet our budget. So they put some interesting measures around that actually. One was around about ‘how many times the project would be sent up for approval’ you know, whether it got knocked back 3 or 4 times, that was the indication of the quality of the project brief or the project plan and then really working on improving that project scoping phase is what they are going to do for the next 12 months. Once they feel that they have got better control over that, then they will move on to the project’s delivery phase.

So it was that real common ground of ‘yeah, this is an area we need to improve and need to get feedback on’. And I don’t know why they hadn’t had that conversation before, maybe it is because it was always assumed and never really spoken about, I am not sure. Obviously it was a bunch of engineers, so it’s you know, sometimes that touchy-feely stuff is never encouraged.

Stacey Barr:

I don’t know if it is just engineers! I keep coming across it all the time, it’s the people saying that same thing “Wow, this is the conversation that we have never had before!” It happened just over a week ago in that workshop I ran “Wow we have never had this conversation before!” It blows me away! I think maybe we do make the assumption that people have already thought through clearly what results matter and what they are really there to try and achieve together. Not a safe assumption to make, it would appear!

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Cool! But just before we ... I would like to talk to you guys about what is next for you guys, like where you are headed now? But before we do that, maybe we could just do a quick summary, because you mentioned you started out that you were reviewing 35 measures for the scorecard?

Bonnie Kite: Yeah, we had 25 for the scorecard and 10 for our team.

Stacey Barr: That's right.

Bonnie Kite: So 35 in total, yep.

Stacey Barr: Right. So can we talk just about the 25 in the scorecard then and just get a sense of those 25, how many of them did you keep? How many of them did you replace? Those sorts of things?

Bonnie Kite: Yeah sure. We had from that 25, 10 were mandatory and so within that we kind of went to that process owner and said "Why is it mandatory? Where is it mandatory? Can you show?" and did a check on those, but even for those mandatory ones we went through and did the Measure Design and Definition. So we had a full complete set of information on how this measure would look and how it would be brought to life, because even though some of them were mandatory, they were only reported on an annual basis and it was just done ad-hoc.

So now we have got that embedded a bit better. So that was 10 of the 25. Then the remaining ones, there the ones that I had the workshops for, the 1-12 workshops for. So some of them we ... well 1 we actually got rid of completely and we redesigned 14 of them and some of them actually remained the same, but we had those important conversations about "Why do we need this measure? What are we trying to achieve? What will that tell us? What would our responses be to it? What has our responses been to it in the past?" that kind of thing. So again we used the Measure Design and Definition templates and went through that whole process and I would probably (off the top of my head) I would probably say we have got about 5 completely new ones that we had to establish from the ground up. Some of them we

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kind of just tweaked a bit and just improved the way that they were going to be reported or changed the calculation, because they didn't encompass the right criteria kind of thing – we were only looking at a certain section of the data, not the whole lot. And 5 complete new ones, which was a massive task to try and get them activated.

Stacey Barr: Wow, that really is a good review then. You kind of touched every measure that was in the original scorecard and in some way or another improved it or replaced it with something better.

Bonnie Kite: Yes and then from there we put our new report template together as well, so that all the data is automatically downloaded as well into that new reporting format and are in the process at the moment of setting up the new quarterly meetings and that particular meeting structure, where (you know I mentioned before, we are kind of geographically challenged) every quarter we will meet in one of the office locations and we have at least 1 person from each of the sections or groups attend and they present on behalf of their team and they will take that turn about.

So they will have a representative there and our GM will manage those meetings as well, so it gives him that 'face time' as well with the staff. So once again it has kind of expanded, the whole project's expanded – as they tend to do. It is not just restricted to the measures on our scorecard; we now are into the behavioral kind of stuff
Stacey.

Stacey Barr: Yeah, which is great. It is not just seeing measurement as 'oh, let's just come up with something to populate the scorecard with' or it is more about how do we really embed it and bring into the way we talk about and manage the work that we do.

Bonnie Kite: Correct, yep.

Stacey Barr: So you are really touching on now Bonnie, where you are sort of taking things next. Do you want to talk some more about that? What is going to happen in the coming months for Bulk Water?

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Bonnie Kite: Okay, well we will send up our balanced scorecard for final approval (with those measures on it) and we have already kind of had that circulated amongst our key stakeholders and staff and I see that would not be too much of a problem and then we will get final sign-off on our reporting template and methodology and activate that first report from December and then we will look at our business planning processes as well. In doing all of this we have identified that there is a real downfall in not only the timing of our business planning meetings, but also the way that they are conducted. In particular for the Business Improvement Group, when we ran our first little 10 measures “Well, what ones do we want to reconsider? What ones do we want to keep?” that kind of thing. We actually did our group plan at the same time, not on purpose it just kind of happened that way. So that highlighted our business planning processes before weren’t as good as they could be.

So that is an area that we are going to do and providing the assistance to the other teams that we have as well. We have 4 groups within the division and a few sections so that we can provide them with advice, even if they just need someone to facilitate developing their team plans or group plans.

Stacey Barr: That’s excellent. So that is like the cascading part of it. What you did with your own team is sort of like the pilot, that it is sort of more replicating that throughout the different parts of Bulk Water.

Bonnie Kite: Yes, yep that’s right.

Stacey Barr: Cool. Just coming back to what you said about the business planning process Bonnie. You found that you were revisiting your business planning to some extent while you were ... at the same time you were doing your measures. Tell me more about that? Was that deliberate? How is that going to impact how business planning for you guys looks like in the future, with regard to when you develop your measures, I guess?

Bonnie Kite: No, it wasn’t deliberate at all. I suppose in having those conversations around ‘what is our intended outcome, what does that really mean, what do we do’ it highlighted

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to us "Oh, we should also be doing this, this and this." but we haven't done that to date. So 'all right we have got to schedule that in somewhere, so lets stick it on our team plan for next year'. So that is kind of really how it came about and then we started thinking "Well how come we didn't think of this before? Was this a gap last year, when we were establishing our group plan?" and then we started looking at all the timing of it. We do have a proper business planning process in place and we do have an annual calendar of all the activities and meetings and so forth that we do throughout the year, but we identified that they are probably not aligned as well as they should be and some of them, the key meetings weren't happening. Especially like the Leadership November meetings where each year people bring in the projects that they want to do and that is the first kind of kick-off and where we say "What are we going to achieve for the next financial year? What are the key projects that the Managers have got going and what do the other divisions have going? Is there any other overlap?" So it has really improved those kinds of communication processes as well.

Stacey Barr: It gives a different meaning to the idea of communicating and executing strategy, it is not like something that gets told to everybody. It has to be a process that people get to participate in.

Bonnie Kite: And it is ongoing as well. I think we had that mindset that "Oh, we have done that now. We are finished!" rather than "Oh, it is continual!"

Stacey Barr: Absolutely yes. Cool. This is a fantastic story Bonnie of great things that you have achieved. Some excellent tips for how you went about doing it and get people engaged, to have them really decide how much time they were going to give to it. Which ended up being more than you had planned for them to give to it.

Bonnie Kite: Definitely.

Stacey Barr: And you have got a scorecard now that you are bringing to life that has got 25 measures in it that people believe in.

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Bonnie Kite: Yeah, that's one of the real success factors. One thing that I had forgotten Stacey is that even though we have about 25 on new scorecard, the scorecard report probably has 50 in it. Where the team measures get reported into that as well. So that is probably what we are doing next week, is going out to the teams and saying "Okay, even though you don't have anything on the scorecard as such, because that's more higher level, what are some local level indicators that you guys have been looking at and lets feed that into the scorecard report." So I suppose that is that buy-in to them coming to the scorecard meetings, so that they have a bit of a brag card as well. So we are not just reporting by exception, we are looking at "Oh these guys have done a really good job, this is what they have achieved!" kind of thing.

It might sound like we are measuring things to death, but that's something that we have always done, I suppose we have always got lots and lots of measures and reporting left, right and centre, so we are trying to really rationalize those down as well. Even though that sounds like a huge amount, it is a lot less than we previously had.

Stacey Barr: Well, it is kind of shared across a group of people too, it is just a few people own those 50 measures. No, that's good and it is like this concept of 'chunking' if you have just got this massive volume of whatever it is, it might be performance measures, it might be ideas, it might be tasks that need to get done. When you chunk things into logical groups, it makes the numbers so much more manageable.

So those 50 measures, it is not just a basket of measures is it?

Bonnie Kite: No.

Stacey Barr: They are organized and organized probably by the perspective in your scorecard and organized level. Some are strategic, some are probably operational?

Bonnie Kite: Yeah, we organize them by ... we have 4 goals, so we have organized them underneath those 4 goals. So we haven't done them by teams, as such. So we say

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“What are all the measures to achieve these 4 goals?” and these are our intended outcomes.

Stacey Barr: Yeah, gets over that ‘silo’ concept. That’s great.

Bonnie Kite: Yep, yep.

Stacey Barr: Okay Bonnie, we are probably just about ready to see if we have got some questions from any of our listeners. Is there anything else that you want to add or share about this whole experience for you, that you think people might get some extra tips, or value from?

Bonnie Kite: I think we have covered a fair bit, but I suppose not underestimating the online resources that you offer as well Stacey. You know, so many times I have been sitting there thinking “Oh what am I going to do here?” and whether it was someone that I had met from the workshop, or any of your articles, that really kind of doing that research as well, I underestimated the amount of personal growth that I would get from that. So that has been a real success too.

Stacey Barr: Wow! Thanks! And just for everybody who is listening, a lot of the resources that Bonnie is talking about are free and you find them on the website. So most of you who are listening are probably people like Bonnie who facilitate, or lead performance measurement in your organization and therefore when you go to my website you just click the ‘Measure Facilitator’ button (that’s the orange one) and that will take you through to a place where you can pick one of the menus along the top (that I think) says ‘Free Stuff’ or ‘Free Resources’ and you can find a lot of the articles for example that Bonnie that Bonnie has been talking about, that she shared with her teams, as pre-reading (to warm them up).

You can find those on that site and download, but if you are looking for anything, go to the site and see what you can dig up, if you can’t find what you are looking for, just send me and my team an email and we will help you out. The idea is that website helps you, without you having to make any huge commitments or investments to just

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get at least started with better performance measures. Thanks Bonnie for that feedback, that was very kind of you.

Bonnie Kite: That's okay.

Stacey Barr: Well we are going to take some questions from listeners and if you are out there and you have got a question, now is the time for you to type it into the form (on the webinar page), or get yourself ready if you have managed to join us by phone.

While you are doing that, I want to remind you as members of this Measures and More Mastermind, you have got access to our online discussion forum which is another really valuable thing to do. When log into that forum, you can contribute to discussions, you can ask questions related to a whole range of measurement topics. Some of the topics that we have got in there is: How do you get started measuring performance? How do you get more buy-in? How do you build a performance culture? How do you align measures to strategy? and there is loads more. On that online forum is also where you are going to be directed to download recordings and transcripts of these monthly case study calls as well.

Now the primary reason I set this forum up was to help you connect with each other. Bonnie mentioned that she had connected with 2 people from the workshop that she went to, it is so important to know that you are not alone in what you are doing with performance measurement in your organization, that you don't feel isolated - so use that forum to meet other people and to connect and to share ideas. It is just amazing the power that you get when a group of minds come together to share ideas and explore questions and if you try to nut it out yourself, or just through reading, connecting with people is just so important.

So make sure you do get online to the forum, give it a try, play around, connect yourself with some others who feel the same as you are, who are going through what you are going through – and incidentally, that is what a Mastermind is, it is that extra mind that gets created as the synergy of all the other minds that are part of it. If you want to get online and you are not quite sure how to, in our weekly updates there is

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always a link in there to click you through to the online forum login page, or you can visit a page on my site, which is www.staceybarr.com/measuresandmorefaq.html and there is some tips there for how to do that.

Okay, so by now we should have at least somebody who has got a question or a comment. So I will go see what is there. Firstly I will just check online, has anyone joined us by phone and has a question, just un-mute yourself by pressing *7 and go ahead and ask a question. Okay, so we probably don't have anybody joining us online. We will see if any questions have come through from the web cast. A few comments from Jen...

Jen (listener): *(Jen's comments read by Stacey)* Hi, I hope your technical difficulties are solved.

Stacey Barr: It looks like you were trying to listen online, but had a few glitches. Moira...

Moira (listener): *(Moira's comments read by Stacey)* Hi!

Stacey Barr: Hi back at you! Hi Sharon. Deana you are there too – G'day! So nobody seems to have a question for us Bonnie.

Bonnie Kite: That's all right, we have virtually covered everything.

Stacey Barr: Well you obviously covered everything. The best thing that you did, was that you actually gave us some examples and shared some of the practical tips that you have been using along the way and it is so wonderful, I love hearing what other people are doing. There is no shortage of ideas for how you can make performance measurement a little bit easier, more fun, more engaging and more valuable for people. I think I heard you say at one point today Bonnie that people are actually feeling excited about what they were coming up with and you don't usually here the word 'excited' and 'performance measures' in the same sentence!

Bonnie Kite: No, no I suppose it is that whole last part where I actually got up on the whiteboard and drew some examples of what this would look like kind of thing, that is when they kind of really started to think "Oh, okay yeah, I want it to look like this." and I drew

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some more examples and I was sort of saying “Oh, okay your results look like this.” or “If they were really poor, or really good, what would you do?” So that is where that excitement part came in, you could see their eyes light up and the attention really to say “Well we could do this, that would be fantastic!” or “Oh, okay that would be a real problem, we would have to notify so, and so.” or “We would have to report that directly to X Manager.” or whatever. So that was that real excitement part I think.

Stacey Barr: Well people care about what they do, they care about what they come to work to do and they get more clarity about that and feel more motivation and more focus and they have more information to decide what they can do about it, that’s wonderful.

Bonnie Kite: Yep.

Stacey Barr: Awesome! Okay, well Bonnie thank you so much for joining us today, it was just wonderful to be able to talk to you and to hear more about your story.

Bonnie Kite: That’s okay, my pleasure Stacey.

Stacey Barr: And thanks everybody for joining in today too. The audio recording of this Case Study call and all of our monthly case study calls from here on in is going to be available like I said on the online forum and it is generally within 24 hours you should be able to download the mp3 file. You can listen to it on your computer, put it on your iPod, burn it to a CD, whatever you like and then the written transcript – we are going to have these calls typed up as well, so that you can either listen again and follow the notes as you go through with your highlighter pen, or just read it when you are on the bus, or on the train, or if sitting at the Soccer on Saturday morning waiting for little Johnny to finish his game! Whatever! And go back over the information, highlight tips that you liked, or ideas that you get. Those transcripts generally take about 5 days for us get them online for you, but we will send reminders out to you for when the recording is ready and when the transcript is ready.

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Now next month's Measures and More Mastermind Case Study call is going to be with Vanessa Taylor and she works in Queensland Transport, Passenger Transport Division and has been leading a team of people who are facilitating measurement throughout their entire division simultaneously. So it is kind of like what Bonnie has been doing. Vanessa has got a team of about (how many are there?) I think 14 or 15 people in here team that are working all the way through the division to get all of the strategic and operational measures designed. She has learnt a ton about getting 'buy-in' to measurement, especially from areas that have been quite cynical about performance measurement. We know how important and challenging it can be to get the cynical people to understand the value of measurement! You probably didn't have that to such an extent Bonnie, or did you?

Bonnie Kite: No, but that sounds amazing what she has done, so I will be listening in for that one.

Stacey Barr: Cool! So everybody make sure you join us on September 16, again 10am Brisbane time and you will meet Vanessa and pick up some practical insights and tips for engaging people in measurement. If you have any colleagues, or friends that you think these case studies are going to help, make sure they visit www.staceybarr.com/measuresandmore.html an they can get all the detail there about how the program works and how they can join, if they want to.

So thanks again everybody for joining today and have an awesome day! Bye!