


Delivering ROI by Taking Focused Actions from a Process Gap Analysis



Pete Talks

Hosted by Peter J. McGarahan.
Special Guest:
James Bolton

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Join us as we converse with Jim Bolton, President of Propoint Solutions sharing his professional expertise, lessons learned and practical experience in the areas of process assessment leading to actionable improvement steps with an established ROI.



Peter J McGarahan



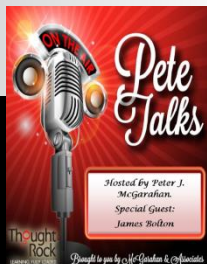
Jim Bolton

Delivering ROI by Taking Focused Actions from a Process Gap Analysis

Join Pete McGarahan as he welcomes Jim Bolton, President of Propoint Solutions. Jim will be sharing his professional expertise, lessons learned and practical experience in the areas of process assessment leading to actionable improvement steps with an established ROI.

Key Learnings:

- Preparing the business case for any Continuous Improvement Plan (CIP) that identifies the targeted Critical Success Factors (CSF) and Key Performance Indicators (KPI).
- Establishing the process assessment to first identify the baseline, actual and targeted measurements for use in the gap analysis and continuous improvement process.
- Reporting the impact of actionable improvement steps as measured by baseline to actual (progress) and actual to target (opportunity).



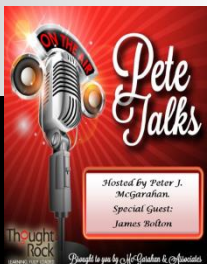
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Knowledge worth sharing

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Continual Service Improvement

“The essence of strategy is choosing what not to do.”

Michael Porter,
Harvard Business Review, 1996



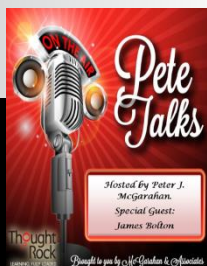
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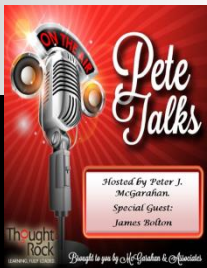
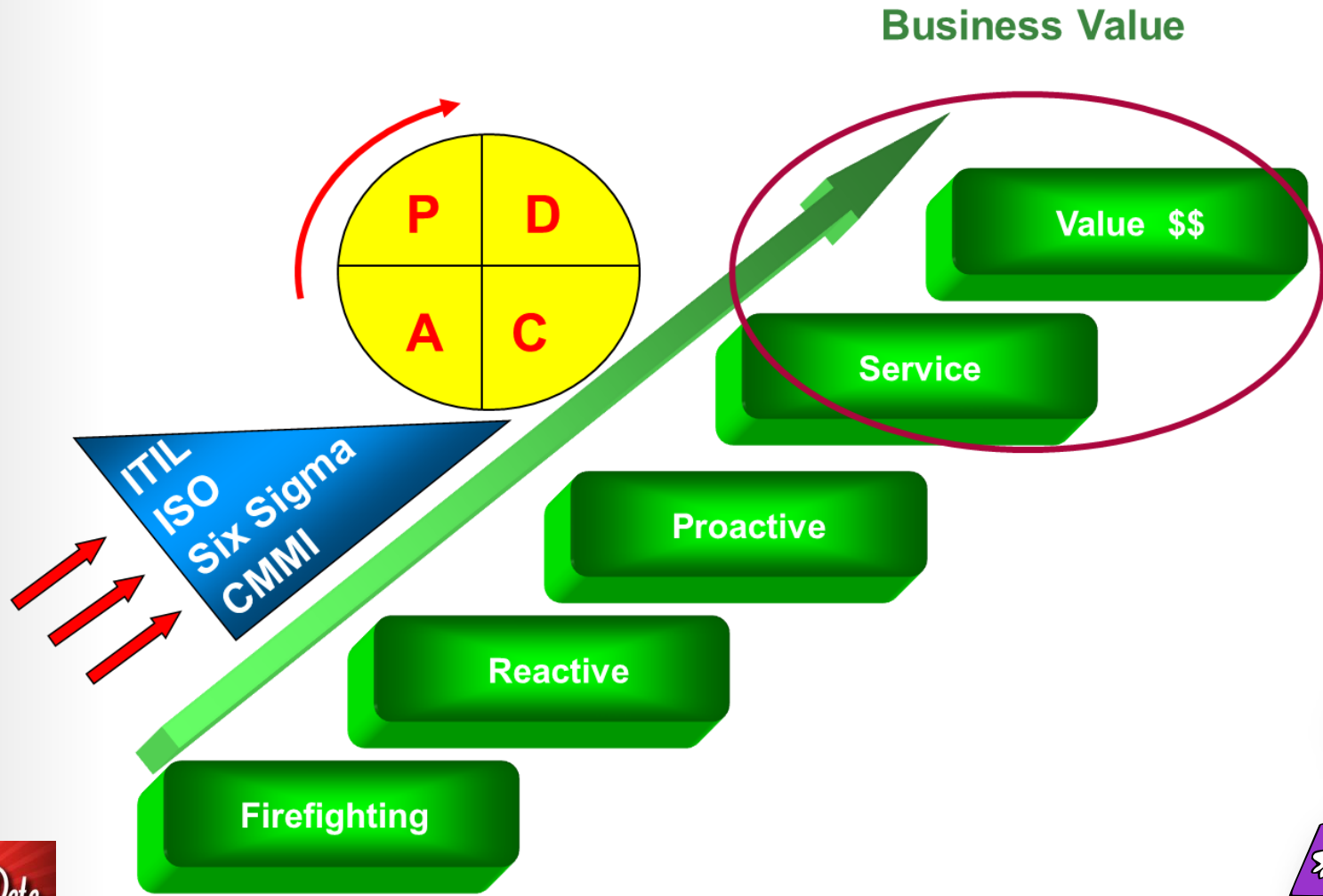
Continual Service Improvement

Choose your own adventure

- ❑ **Managing by Crisis** - the belief that the ability to solve problems effectively is a good strategy. This approach allows events to dictate management decisions and is highly risky because it assumes that they will always be able to solve the problems.
- ❑ **Managing by Customer Demand** - this type of organization does not seek to understand its customers or their business outcomes. They make basic services available whenever users complain about poor performance. They never question the validity of the demand and can never quantify the value of its investment.
- ❑ **Managing by Extrapolation** - continuing the same activities in the same manner because things are going well.
- ❑ **Managing by Hope** - making decisions on the belief they will usually ultimately work out.
- ❑ **Managing by Best Effort** - doing one's best to accomplish what should be done. There is no general plan, there is also no clear understanding of the actual investment required so no ability to demonstrate value.



ROI Based CSI



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Creating the Strategy, Plan & Business Case



1. Know where you are

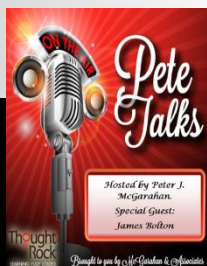
- Assessing your organization's current knowledge tools, practices, preferences and performance around service strategy, structure (support model), process, people, tools and metrics is an all-important baseline.

2. Know where you are going

- Envisioning the end result or how you visualize Knowledge impacting your organizational and business performance.

3. Know how you plan to get there

- The Knowledge Strategy, Plan and Roadmap, the result of your gap-analysis assessment against your future-state, should foundationally align what you need to do to make progress against the plan.

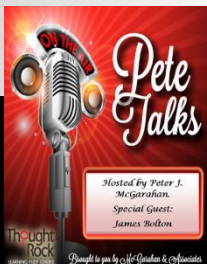
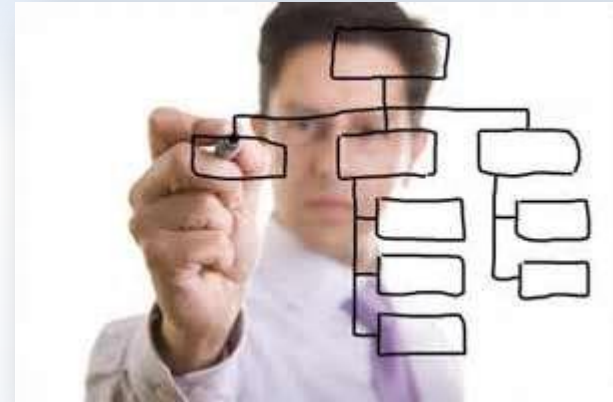


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Building The Business Case

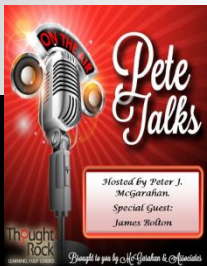
1. *Executive Summary*
2. *The Service & KM Strategy*
3. *The Current Situation*
4. *The Proposal*
5. *The Cost-Benefit Business Impact Analysis*
6. *Recommendation & Conclusion*
7. *Resource Planning*



ROI Based CSI - A 6 step process



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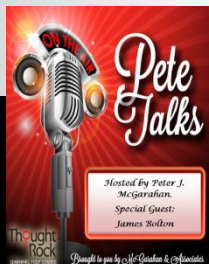


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Reaping the Rewards (The ROI of CSI)

- Create a balanced reporting approach to performance metrics
 - **Key Performance Indicators (KPIs)** that focus on efficiency, effectiveness, customer satisfaction and cost control.
- Align your performance metrics (KPIs) with your Critical Success Factors (CSF).
 - **Critical Success Factors (CSFs)** are your goals and objectives that support your service strategy and are aligned with what's important to the business.
- Measure your actual performance on a monthly basis.
 - **PROGRESS** - Actual compared to Baseline
 - **OPPORTUNITY** - Actual to Target
- The performance metrics (KPIs) that holistically matter most are the ones that measure **Confidence** in the KM program and repository.
 - E.g. It is the **confidence** factor from all engaged and involved staff and customers that will continue to **increase adoption**, create fans and **deliver value** on your **investment**.



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