

## Case 2:

### **Processes and performance measurement**

Our client needed to design, manage and improve key core processes in order to fully satisfy and generate increasing value for customers and stakeholders. The processes needed to encompass the whole of the business and to clearly define achievable objectives and manage their performance.

Reform & Whaley's comprehensive recommended Action Plan:

#### **Methodology, Strategy:**

The essential elements in this project were to gather information, analyse the feedback, organise the change management strategy, and maintain vigilance over the effort. These elements included the following steps:

#### **Diagnostic Desired future state**

Determine all methods of measurement and performance areas that are required to support the new corporate strategy (future state).

Determine the values, beliefs, expectations, and performance that are required to support corporate strategy (future state).

Report back on any perceived differences in those areas.

Develop an audit template that will be used to record current performance, track improvement and list opportunity improvement areas.

#### **Current state**

Review previous analysis carried out to determine employee's values, beliefs, expectations and performance.

Complete an in-depth audit that will establish the current state of the requirements for our client.

#### **Analyse the gap**

Create a plan to reconcile the desired state with the current state. This is the change management strategy.

Determine who the key sponsors and leaders are, and educate and coach them accordingly in their roles as exemplars and leaders.

Designate the behavior and performance expected and how to measure applications.

### **Implementation**

Make the required changes, as needed, in systems and processes, whilst maintaining team spirit and company culture. Continuously evaluate performance.

Establish communication channels for ongoing feedback and educations.

### **Methodology and Operation:**

Design and implement a clearly defined business plan to produce monthly accounts.

Have a clear and published process across the business structure ensuring optimum productivity and daily KPI recording.

Issue job descriptions which include agreed limits of authority.

Design and implement training plans for all staff.

### **Cross functional Leadership**

Create a Management structure with defined reporting.

Empowerment for Branch and Department Managers.

Performance Managing.

Operate with integrity, honesty and transparency.

### **Policy and Strategy**

Develop a complete business plan.

Define clear levels of authority.

Facilitate and minute daily, weekly and monthly meetings.

### **People**

Issue all staff with job descriptions.

Recruit and appoint staff via a formal procedure.

Implement Performance Management.  
Carry out staff evaluations and appraisals.  
Conduct regular expectation exchanges.  
Conduct staff satisfaction surveys.  
Have a clear remuneration policy.

**Processes and performance measurement.**

Introduce a service process.  
Daily and weekly DOC's (Daily Operating Controls).  
Have formal month-end meetings with reporting procedure.  
Shared financial information.  
Monthly reviews carried out at each site with management team reporting on their own performance.  
Reward structure based on achievement of business plan.