

Is the lack of metrics adding anxiety for those working from home?

by Ernesto Solari

In this third and final delivery, we will review the full scope of the Focus Report and how this one-page report serves as the baseline for the Feedback Report. A simplified sample report below illustrates a variety of quantifiable parameters and how these get contrasted between pre-determined goals vs actual status results. The critical success factors shown are associated with different job profiles so I can show you the versatility of the One Page Management approach.

Critical Success Factor	Status	Goal
Success Area: Sales		
Widget A sales target	\$12,800 (May 2020)	\$10,000 monthly
Success Area: Customer Service		
Customer Satisfaction Survey	Good	Excellent
Success Area: Talent Acquisition		
Filled Vacancies	42 days (average to date)	30 days max to fill
Success Area: Product Development		
Produce code and application execution with no errors-Phase 1	Two errors	Zero errors
Success Area: Administration		
Monthly Reports	3 rd business day (May)	5 th business day after month-end
Success Area: Supervision		
Conduct Team's Annual Performance Reviews	June 7, 2020	June 12, 2020

I will now show you the full scope of the Focus Report template with some columns added. Let's take the first line to elaborate on the logic behind the new columns. The success factor on the first line, the "Widget A sales target", has a \$10,000 monthly target goal. Let's pretend that a finance expert in your company determined that for costs and expenses to be covered and the equilibrium point that justifies your job as an Account Sales Manager requires a minimum level of \$10,000 per month. The question is, what happens when the goal is met and exceeded? The report adds two more brackets: Satisfactory Goal Level and Outstanding Goal Level.

Critical Success Factor	Status	Minimum Level	Satisfactory Level	Outstanding Level	Trend
<i>Success Area: Sales</i>					
Widget A sales target	\$12,800 (May 2020)	\$10,000	\$12,500	\$15,000	Good

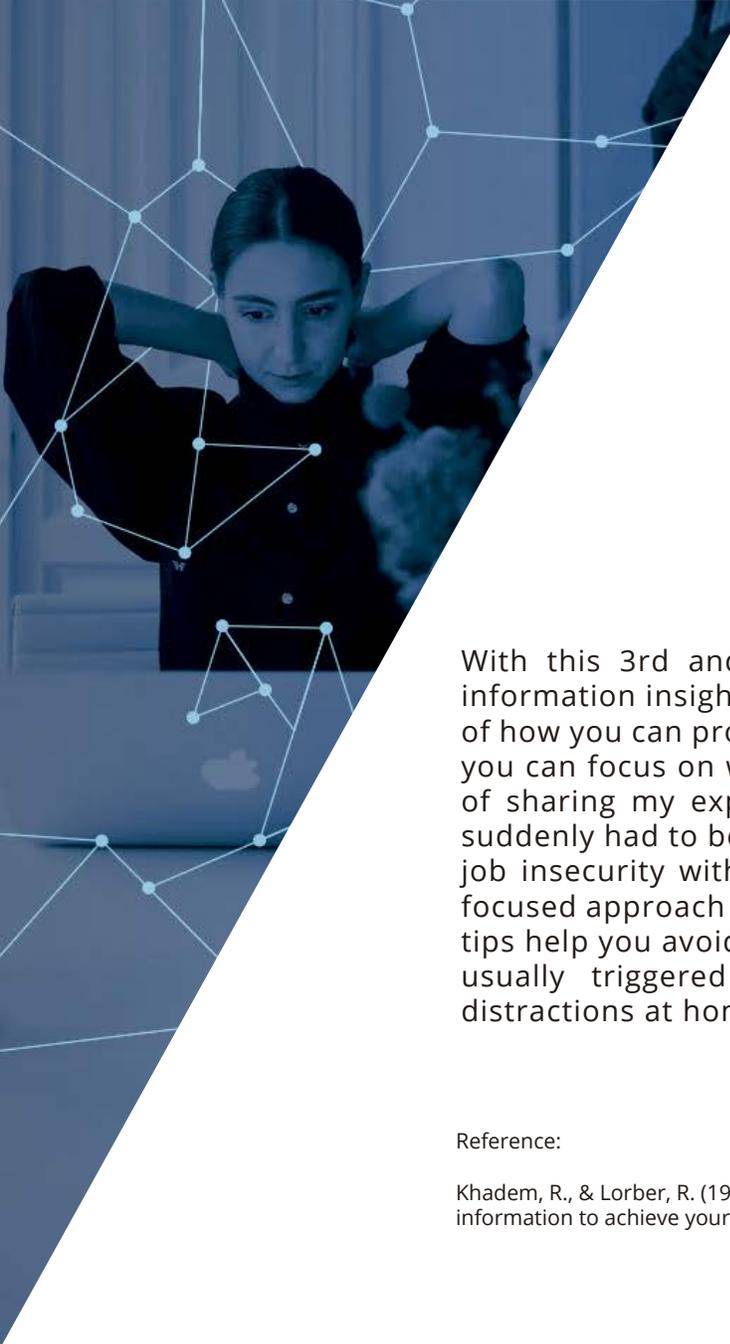
This reduced sample report line illustrates that the sales status for the month of May was above the minimum and fell under Satisfactory Level, therefore, a column labeled Trend on the right records this as Good news! Generally speaking, you must record as Bad news anything that falls short of the Minimum Level target goal. With this logic, all sample goals need a minimum, satisfactory and outstanding levels and associating some logic on how frequent each success factor will be assessed (e.g. weekly, monthly, etc). The cycles of the reports will be determined by the nature of your job's duties and responsibilities, the job's critical success factors, the discussion and agreement reached with your manager, and the matching of the performance expectations. These factors must be aligned for the one-page tool to be successful!

Once we have a complete Focus Report for one or more periods, and we get into the habit of submitting this periodically, the main substance that feeds the one-page Feedback Report is ready. A reminder: this one-page Feedback Report will inform you and your manager about the good and the not-so-good news about your performance in a determined period of time. This last sentence sounds scary, isn't it? But don't be! It's actually a good tool used for growth and development in organizations: if you always have good news to report then your goals were set to easy to achieve. If you have multiple periods showing a negative trend then there's something structurally wrong that needs further analysis.

In the sample Feedback Report below you will note that the Focus Report informed under “Periods in a Row” how many times the critical success factor trended as Good or Bad according to the tracking criteria. You will need to be diligent keeping track of the historic reports should the time to sit down for analysis and problem-solving comes up. Also, it is worth noting that on the positive side of things the column is based on Satisfactory Level while on the negative side the column is based on the Minimum Level. This approach helps contrast both sides of your metrics.

Critical Success Factor	Status	Satisfactory Level	Periods in a Row	Trend
<i>You've Made Your Goal - Congratulations</i>				
Widget A sales target	\$12,800 (May 2020)	\$12,500	1	Good
Customer Satisfaction Rating	9.5 (weekly average)	9.0	6	Good
Critical Success Factor	Status	Minimum Level	Periods in a Row	Trend
<i>You Have Problems – Think Smarter</i>				
Monthly Reports	8 th business day (May)	5 th business day after month-end	2	Bad
Filled Vacancies (2 nd Quarter)	42 days (average to date)	30 days max to fill	2	Bad

The complete scope of the One-Page Management reports system includes a third report: the Management Report which is basically an aggregate of a manager's direct reports Feedback Reports. A manager could bring this one-page report to senior management with a nice view of what his/her team had accomplished (or not) over a number of periods. The key to these reports is the valuable quantified information that is used for analysis and discussion, for employees' rewards and recognition, and ultimately to problem-solving for continuous improvement in the workplace.



With this 3rd and last delivery, it is my hope that you find the information insightful and that the three articles paint a clear picture of how you can proactively develop your quantifiable goals at work so you can focus on what your critical success factors are. The purpose of sharing my experience with this method is to help people that suddenly had to be confined in a home office to reduce the anxiety of job insecurity with the covid19 pandemic and to work with a more focused approach to the vital areas of your job. I also hope that these tips help you avoid the long hours and the unusual evening/weekend usually triggered by some sense of guilt because of normal distractions at home.

Reference:

Khadem, R., & Lorber, R. (1986, Dec 15). One page management: How to use information to achieve your goals // review. Financial Post (Index-Only) ISSN 08388431



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