

TEMPLATE: The PuMP® Diagnostic

Circle the number on the scale that most closely represents where your team’s performance measurement system currently sits on the scale for each of the criteria.

Diagnostic 1: How measurable is our strategy?

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| 1. We don't have a strategy at all. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | We have a documented strategy that includes goals or objectives in support of our vision/direction. |
| 2. Our strategy uses weasel words such as 'efficient', 'effective', 'reliable', 'quality', 'enhanced' and 'sustainable' | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Our strategy is very clearly articulated in words that are not ambiguous, and everyone shares the same understanding of these words. |
| 3. Our goals or objectives are statements about the actions, projects or initiatives we want to undertake. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Our goals or objectives are statements about the impact, difference or result we want to create or achieve. |
| 4. Each part of the organisation develops its own goals or objectives independently, with no attempt to align them. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Our strategy is linked and cascaded from the corporate level to the operational team level, and each member understands their contribution. |
| 5. We have dozens of goals and objectives because a lot matters. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | We have ruthlessly prioritised our goals or objectives to fewer than a dozen or so. |

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Diagnostic 2: How meaningful are our measures?

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| 6. | Very few (or none) of our measures are clearly linked to our goals and objectives. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure is clearly linked to a goal or objective of which it provides meaningful evidence. |
| 7. | We have too many measures, or not enough | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every important performance aspect of our strategy or business operation is measured with the bare minimum number of measures. |
| 8. | We use milestones or actions as measures (e.g. Implement CRM by June 2011 or Improve customer complaints process) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure is objective evidence that regularly gauges the degree to which a performance result is occurring over time. |
| 9. | A lot of our measures are simply a few words such as Staff Survey Productivity or Sustainability Index with no clear description of exactly what the measure is. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure has a clear and unique name accompanied by a description of exactly what is being measured (e.g. <i>Overall Customer Satisfaction = average customer satisfaction rating on scale of 1 to 10 for our overall service delivery</i>). |
| 10. | People don't feel engaged or don't buy in to performance measures and avoid spending time on measurement. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | All members of the organisation value measures as useful feedback to help them do their jobs better and contribute to the organisation's vision. |

Diagnostic 3: How well are our performance measures implemented?

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| 11. None (or very few) of our measures have the data available they need, or to the level of integrity needed. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure has the data available that it needs, and to the level of integrity needed. |
| 12. Most measures are annual or quarterly. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure's frequency is deliberately chosen to provide the best time-series analysis for quickly identifying signals. |
| 13. There is no guarantee that measures are measuring what they should. Among the measures we have duplication, different versions of the truth, and use of incorrect calculations and analysis. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure's calculation formula is clearly detailed and consistently applied. There is one version of the truth for each measure (no duplication or ambiguity). |
| 14. There is little to no ownership of performance measures. No one knows who is responsible for monitoring which measures. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure has an owner, and every measure owner feels a strong sense of buy-in to her measures (i.e. they use the measures and value them). |
| 15. Most measures are reported without clear intention or a clear definition of the appropriate responses to different signals. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure's purpose is clear, and its owner knows the appropriate responses (depending on the measure's signal). |
| 16. Measures pop up like mushrooms, and we have no idea how many we have. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Every measure is documented in a corporate dictionary of measure definitions. |

Diagnostic 4: How useful and usable are our performance reports?

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| 17. Performance reports are ad hoc or non-existent. We do not follow a standard performance reporting process. | 1 2 3 4 5 6 7 8 9 10 | Each performance report or dashboard is designed for a specific audience, tailored to the measures and results that audience owns, and produced regularly and routinely. |
| 18. We use pie charts, stacked bar charts or pre-packaged dashboard tools like dials or gauges—whatever is the default or looks good. | 1 2 3 4 5 6 7 8 9 10 | Most measures (and when it makes sense) are graphed to show historic time series and highlight important signals about changes in performance over time. |
| 19. Performance reports are hard to navigate. It's hard to find the information of most use. | 1 2 3 4 5 6 7 8 9 10 | Each performance report or dashboard is consistently structured around the goals or objectives measured in the report. |
| 20. It's not clear from performance reports what needs action and what doesn't. It takes time to work out exactly how performance is tracking. | 1 2 3 4 5 6 7 8 9 10 | Each performance report or dashboard highlights where performance is tracking well and where it isn't, so it's easy to prioritise where to focus. |
| 21. Performance reports are bulky, with updates on project progress and operational minutiae, and users don't have time to read them all. | 1 2 3 4 5 6 7 8 9 10 | Each performance report or dashboard contains the essential information to answer what is happening, why, and what should be or is being done. |

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Diagnostic 5: How well are performance measures improving performance?

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| 22. We assess performance by comparing this month to last month (or this week to last week, or this month to the same month last year, etc.) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | We use statistically valid methods to determine when performance has changed so we don't react to differences that are part of normal variation. |
| 23. Performance shortfalls and missed targets are easily blamed on outside forces such as the economy, lack of budget or not enough staff. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Performance shortfalls are analysed, and the root causes are found and fixed before targets are missed. |
| 24. Measures are used as a tool to assess people's performance. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Measures are used to assess business and process performance, and as a tool for people to make decisions and take action. |
| 25. Most performance targets are missed. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Most performance targets are achieved. |
| 26. We rush to implement ideas and initiatives without testing first (our motto is 'Don't just stand there, do something!') | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | We use our measures to test strategies and improvement initiatives before full implementation so we don't waste time or resources on solutions that don't work. |