"Organizations are complex interdependent systems that have a range of issues that impact the measurement of their performance, and understanding the impact of these issues needs to be considered because of their significant influence."

# Leading with Radically Informative Indicators

## Understanding Business Impact

By Laura Freebairn-Smith, Patrice Murphy, and Ross Tartell

ORGANIZATIONAL PERFORMANCE GROUP

In organizations, managers are accustomed to differentiating between tactical, operational, and strategic measures. This is part of a quantitative business approach to decision-making and assessing impact (Gordon & Pressman, 1978). However organizational research and experience show our measurement systems to be fraught with misdirection, blurred focus, and over- or under-application. Business is replete with examples of people and organizations measuring things that do not assess the real impact of their activities at the strategic level.

In this article, we tackle two questions:

1. What key issues impact the organization's capacity to measure its performance?
2. How do organizations validly measure the difference they make in their business?

We then go on to discuss how the skills of OD professionals contribute to the process. Our aim is to help leaders and OD professionals keep their top team's "eyes on the prize" by using "Radically Informative Indicators" (RIIs): a few key measures that describe the overall health of an organization by tracking aspects of performance that matter most and have the greatest impact on the organization's competitive strategy.

Connecting the development and selection of an RII to the organization's strategy directly links it to what is critical for successful organizational performance. But, that is only part of the story. Organizations are complex interdependent systems that have a range of issues that need to be considered because of their significant influence.

Most measurement systems are far too complex. Not only do they fail to enable the organization, they actually damage it by draining resources, distracting leaders from strategically important signals, and misdirecting effort. The quest to understand metrics, help explain performance, and focus attention is illustrated by Vilfredo Pareto, an economist who developed the Pareto principle or "80/20" rule. The 80/20 rule supports the idea that 20% of an organization's buyers represent 80% of sales in the same way that 20% of an employee's work accounts for 80% of his or her effort (Forbes, 2014). In other words, a small percentage of work, and in our case, measurement, wields a significant amount of power. The challenge is to identify and use the few measures that best illuminate performance.

Without understanding the importance of selecting and using key measures, it is easy to obscure the forest for the trees. Consider this example:

> The Associate Vice President of Administration sat down at the conference table and placed a 40-page PowerPoint deck on the table. Each page was dense with percentages and ratios and trends. "Which of these makes any difference to your department? Which of these changes staff behaviors and the actions they take?" asked the consultant. "I wish I could tell you," the AVP sighed. "And what's

> worse, I have a staff member spending almost all of his days collecting this information!"

"Keep it simple" is the obvious remedy. But using fewer measures *increases the importance* of the ones that are chosen and the decision-making process can feel uncomfortable, even dangerous. What if the wrong measurement choice is made?

One way to address this issue is through the creation of a strategic dashboard, a single place that aggregates and displays critical business information.

**Measuring is an exercise of power and authority. As members of organizations, we are in a position of authority or power when we can ask for data, and we are invoking power and changing the system in which we work by doing so. It is an axiom of change management that the act of collecting data is an intervention into the organization.**

Aggregating the information in one place will highlight the relationships, and the focus on Radically Informative Indicators provides insight into organizational performance. This identification of critical measures creates many benefits that accomplish the following:

1. Makes managing easier because of fewer distractions
2. Frees people to focus on a few key measures and the activities that drive them
3. Stimulates a much more sophisticated, nuanced understanding of how the business moves each indicator and how elements of the business impact one another
4. Decreases silo thinking
5. Creates more sophisticated organizational citizens

### Why Measurement Is Difficult

It almost goes without saying that measurement is a distinctive feature of both personal and organizational life. As social beings, we measure ourselves in a variety of ways—income, SAT scores, grades, weight, and more. In our organizations, we measure relentlessly for a wide range of reasons.

As we focus on identifying the key measures that help us to understand the impact we have as OD practitioners on the performance of an organization, it is helpful to keep in mind three underlying psychological dynamics of measurement.

#### 1. Measuring is an invocation of power, and thus creates anxiety.

Suppose someone is asked how much they weigh. What happens to that person's heart rate when he or she is asked that question? For most people, talking about how much they weigh, their debt, or their income is uncomfortable. The anticipation and reaction to feedback has a significant emotional impact such as anxiety, defensiveness, fear. and hope (Nadler, 1977).

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> Ben Bernanke recalls how, soon after becoming Chairman of the US Federal Reserve Bank, he "asked an idle question at a briefing." By the end of the day, the staff had sent him a "ten-page memo that answered the question under four sets of assumptions and included a bibliography." (Bernanke, 2015, P.67)

Given its power, it makes sense to be careful with measurement in all its forms.

#### 2. What we measure gets our attention.

Measuring directs attention, consistent with the old maxim, "What gets measured gets managed." Measuring thereby impacts the organizational system, potentially altering how work is done and changing performance. Often, the attention drawn by measuring creates unintended behaviors.

In his seminal paper, "On the Folly of Rewarding A, while Hoping for B," Steven Kerr observed: "(I)t is hardly controversial to state that most organisms seek information concerning what activities are rewarded, and then seek to do (or at least pretend to do) those things, often to the virtual exclusion of activities not rewarded." He illustrated this concept with an experience in the Broward County, Florida courts. In hearings to determine capacity in the elderly, court-appointed experts were paid more if they found the elderly person incapacitated. Five hundred and seventy out of 598 hearings resulted in a finding of incapacity. Not a surprise (Kerr, 1995, p.9).

Good measures provide focus while minimizing such unintended consequences as those noted by Steven Kerr. Using models or mapping the systems in an organization can be helpful in understanding the whole system and its interactions, and deciding what to measure to create balanced outcomes (Burke, 2011). Modeling the organization can offer profound insights into how the elements of any system interact with one another. Using this approach to better understand the organizational system can help leaders identify effective goals and measures, determine where, when, and how they should be used, and forecast the positive and negative implications of the intervention.

Effective measurement is thus complex and costly. We spend huge sums measuring inputs, outputs, results, side effects, variability, and anything else that might create profit and support a myriad of other goals. Well-applied measurement strategies and their close cousin, goal-setting, are critical tools for ensuring strong organizational performance.

**3. There are reasons and situations when measuring interferes with success.**

In some settings, measurement interferes with the creative process, a requisite level of attention to detail, or the use of individual expertise. Art, innovation, surgeries, and emergency rescues are examples of moments when the pressure and distraction of live-time measurement can interfere with the outcome.

That does not mean that measurement does not occur. Audiences silently judge if a symphony is pleasing to the ear. A music professor grades a musical composition. In an emergency, critical tasks must be performed and they become the total focus of attention. That doesn't mean that measurement stops. Instead, key indicators are monitored in the background, becoming important after the event is over. The use of unobtrusive measures, which do not disrupt the business context with a data collection process, can be an alternative approach to gaining information without distraction from the reality of the situation (Webb et al, 1966).

Finally, there are times when there is no need to measure because it is a one-time event or the costs of measurement are so high that to try to collect the data is prohibitive (Cady & Kim, 2017).

### Losing the Link: Three Big Measurement Traps

Why are so many measurement systems often flawed? We live in a world that is volatile, uncertain, complex, and ambiguous. Measures by their very nature direct attention to selected aspects of this environment and the consequences of our action upon it.

Three common traps derail measurement schemes:

» **Dissociation from the desired outcome**—Measuring what's easiest to measure; just using what already exists; setting a target before knowing whether or not its measure is appropriate; measuring too far up or downstream from the desired outcome.

» **Dissociation from the organization's capacity to absorb change**—Creating new measures for every objective when serviceable measures are already in use; pursuing perfection as the enemy of the good.

» **Dissociation from the drivers of work role performance**—Measuring behaviors that are easily defined in a mechanistic view of formal, stable, and task-based jobs, instead of the subtle and discretionary behaviors that are critical to the performance of emergent, socially embedded work roles. (Murphy and Jackson, 1999)

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### Start at the Leading Edge with Radically Informative Indicators (RIIs)

Clearly there are many reasons why measurement of organizational performance is difficult to do well. What is needed is a simpler set of measures to focus attention quickly and easily on the most important aspects of the organization's strategic health. RIIs are the "kings" of measures—they are often, but not always, the broadest and most strategic. Sometimes they appear tactical but represent a critical leverage or juncture point in the organization's workflow.

There is a preponderance of short-term operational and tactical measures that are subsumed under RIIs. Each organization must select which measures it will use since there are often many from which to choose.

RII are critical indicators of the achievement of the organization's strategy. These measurements must be easily verified and reported. Connecting the development and selection of the RII to the organization's strategy links it to what is critical for successful organizational performance.

Creating RIIs serves three primary purposes:

» First, it provides organizational motivation. Using measures provides a signal that stimulates effort and targets behavior. Like the start of any change strategy, the performance gap provides energy to resolve or address the issues.

» Second, measures provide clarity regarding strategic goal achievement. Has the action yielded the desired results?

» Third, good measurement enables strategic learning. Where gaps exist, strategic measures provide insight about the impact of alternative courses of action. They provide the information as to how well the strategy is working, both positive and negative variances, and insight into what actions might be taken to address the performance gaps or build on the strengths.

One result of the selection of strong strategic measures is that they are appropriate for setting targets (i.e., SMART Goals: Specific, Measurable, Attainable, Relevant, and Time-bound) that can become more granular and detailed as the level of analysis becomes more finely focused. In addition, because of their relevance, the measures become useful for communicating priorities and establishing accountability.

### Setting RIIs to Guide Growth into the Future

The creation of RIIs starts with the vision, mission, and strategy of the organization. Like any change initiative, a picture of the future state is critical to determining what information needs to be collected in order to guide action or make a decision. An example drawn from the not-for-profit world can be used as an illustration.

Maxwell Anderson of the Getty Leadership Institute notes that finding a way to measure performance is among the most urgent needs of art museums. Strong metrics are critical to making a case for funding and to manage vital museum functions (Anderson, 2004).

Anderson points out that appropriate metrics fit three criteria: "mission-focused, long term, and verifiable. Metrics that fit these three conditions must:

» be directly connected with the core values and mission of the art museum;
» be reliable indicators of *long-term* organizational and financial health; and
» be easily verified and reported." (Anderson 2004, p. 9)

### Case Study: Setting RIIs to Strengthen a Museum's Future

An example of setting effective RRIs occurred in the not-for-profit area with the creation of the Williams College Museum of Art. In 2014, as the museum was about to begin its ninth decade, the organization was looking to strengthen its capacity, express the college's mission, and support its community "in more integrated, creative, and innovative ways" (WCMA, 2014).

Under the leadership of the museum's director, WCMA went through a strategic planning process to understand their direction and the indicators that would enable them to calibrate their efforts. This led to consensus on the drivers of success and the creation of institutional metrics that provided guidance for their performance.

The core team, composed of WCMA staff and select members of the Williams College Art Department, developed three areas of focus that linked the strategy and vision for the museum (WCMA, 2014). These were:

#### 1. Develop a "Critical Making" Initiative

This area of focus combines critical thinking, design thinking, and creative practice. Critical making seeks to build students' capacity to make and design experiences. As part of this initiative, the museum will both lead and catalyze projects, sometimes acting as a site for the exploration of design problems outside its walls and other times as the site of a project's final form, which manifests as an exhibition, program, installation, etc.

#### 2. Wake Up the Collection

The collection is core to the museum, and has tremendous potential to stimulate learning, creativity, and scholarship. The museum will "wake up" the collection's potential by significantly growing it, increasing the quality and space dedicated to its display and study, and offering it up as a campus-wide platform for student and faculty creativity and experimentation.

#### 3. Become a Center for Public Intellectual Life

The museum will expand its role as a portal between a broad, diverse public and the campus by becoming a curator and broadcaster of an array of public programs for visual culture, both onsite and online. As a dynamic hub, the museum will fertilize interdisciplinary connections and bring together thinkers in purposeful and inviting spaces that build social and intellectual life for the college community.

WCMA then created RII-like institutional metrics, to measure the factors that would enable (or prevent) achievement of these three critical areas of focus. The measurements fell into four key metrics categories (WCMA, 2014):

1. **Deep and wide engagement:** Many people having meaningful experiences. The number of people engaging with WCMA and at what level, through the spectrum of: 1. Clicks on the website; 2. Feet in the door; 3. Repeat visitation; 4. Co-production with the museum, (i.e., co-teaching or co-curating).
2. **People:** Expert staff with an excellent work ethic doing their best work. Attraction and retention of highly trained, diverse, motivated, and enthusiastic staff who are the best professionals in their area of expertise.
3. **Buzz:** Recognition in the larger field. Broad recognition for unique and challenging exhibitions, programs, and training of emerging museum practitioners to measure WCMA's influence in the greater art and college museum fields.
4. **Passionate giving:** Significant increases in the donation of art, funds, and people's time. Donated resources in the form of time, money, and expertise as indicators of the interest and excitement WCMA programs and exhibitions generate.

The four key metrics that Williams College Museum of Art discovered through their strategic planning process serve as their Radically Informative Indicators. Through these metrics, WCMA can measure the specific levels of engagement across their staff and in the field, that lead to achieving their vision of establishing a critical making initiative, waking up their collection, and being a center for public intellectual life—all crucial to WCMA thriving in its community.

WCMA used a rigorous data collection and analysis process that incorporated interviews, focus groups, surveys, and environmental scans to identify, distill, and validate the vital few metrics, the RIIs, that will guide the museum's future course of action and will measure its success.

### Case Study: Avoiding Corporate Divorce by Finding the Right Data

RIIs can also be used to build a team and drive the development of common goals that then shape performance. This case, drawn from a large Fortune 100 pharmaceutical company, highlights how they can be used as a diagnostic to resolve critical organizational performance issues.

A major corporation had a partnership with a corporate travel agency. Many intractable performance problems were bringing the once-thriving partnership to the brink of a potentially expensive divorce. There were significant problems with travel arrangements, cost of travel, travel agent responsiveness, and other symptoms of a broken relationship and process. The travel agency did not want to lose an important client, and the company did not want to incur the cost and inconvenience of transitioning to a new and untested partner. Under the sponsorship of the pharmaceutical company's CFO and the travel company's CEO, they created a plan to work together to understand the issues and improve the situation.

As they shared their data, the two organizations realized they were looking at quite different measures of performance. In fact, neither party truly understood what factors were most important to increasing customer satisfaction and service quality. Heroic improvement efforts by the employees of both firms were being wasted.

To understand what was most important, the joint improvement team examined the dozens of objective and attitudinal measures being collected from travelers and travel arrangers. Through their rigorous analysis, they distilled the five performance dimensions that predicted the critical RII: customer satisfaction. All other measures were discarded.

The performance dimensions that predicted customer satisfaction were:

1. Accurate service delivery
   - Travel agent went out of the way to help.
   - Accuracy of tickets, reservations, and confirmations.
2. Lack of correct information given to customer
   - Travel agent able to answer questions and all information provided.
   - Customer did not have to make multiple calls.
3. Speed of transaction
   - Time to complete reservation met expectations.
   - Travel agent went out of way to help.
4. Explanation of procedures/options
   - Travel agent explained procedures and options.
5. Timeliness of delivery
   - On-time delivery of tickets.

Performance baselines were quickly established for customer satisfaction, followed by a period of collaborative process improvement concentrated on changes that would improve the five performance dimensions that drove high levels of customer satisfaction. These improvement efforts included improved processes and technology, refined compensation incentives, and training and communication targeted to travel agents, travel arrangers, and travelers. The result was an accurate understanding of the problems, a common focus for action, a successful partnership, and satisfied customers.

The process succeeded because of the shared goal, rigorous process, and the commitment from the leadership of both organizations to drive improvement on common measures of performance. The definition of a single valid RII—customer satisfaction—and the acceptance by both the pharmaceutical company and travel company of this RII was key to the success of the effort.

**When organizations use Radically Informative Indicators they can focus on "what really matters," and understand when they are on track and achieving their performance standards. In addition, RIIs help organizational members understand the organization's vision, strategy, and potential for success in very concrete and operational ways. Identification and use of RIIs requires strong data collection, project management, and facilitation skills—capabilities that are core to the OD practitioner's skill set.**

### Implications for the OD Practitioner

When organizations use Radically Informative Indicators they can focus on "what really matters," and understand when they are on track and achieving their performance standards. In addition, RIIs help organizational members understand the organization's vision, strategy, and potential for success in very concrete and operational ways.

Identification and use of RIIs requires strong data collection, project management, and facilitation skills—capabilities that are core to the OD practitioner's skill set.

OD methodologies provide a critical approach to creating RIIs, and ensure the collection of valid data that then becomes distilled so that the most important measurements are identified and can be arrayed from the visionary and strategic, to the operational level.

In addition, the process is fraught with differences of opinion and perspective. Facilitation, conflict resolution, and analytical skills are critically important to guide the development of RIIs. Without the OD practitioner's capacity to make sure the measurements are valid, distill the data, and create consensus, the final conclusions and metrics cannot be defined and used to monitor organizationa performance.

The difficulty in carrying through the process is reflected in the organization's market environment. The world is becoming increasingly volatile, making the leadership of organizations ever more difficult. The creation of Radically Informative Indicators can help organizations understand where to focus their efforts and recognize how those efforts can affect their future success. The OD practitioner's skills, perspective, and approach can help organizations define the Radically Informative Indicators that will enable them to understand their process and measure their success.

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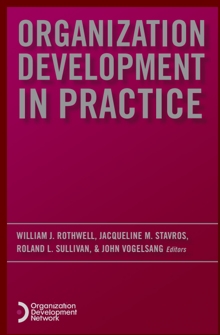


# *Organization Development in Practice*

Editors
William J. Rothwell, Jacqueline M. Stavros,
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» Includes cases, illustrations, and practical applications
» References sources for ideas, theories, and practices
» Reflects OD values: respect and inclusion, collaboration, authenticity, self-awareness, and empowerment.

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*(continued next page)*

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## Publications

- *OD Practitioner,* the flagship publication of the OD Network, is a peer-reviewed quarterly journal.
- *Practicing OD* provides practice-related concepts, processes, and tools in short articles by and for busy practitioners.

Both publications and their submission guidelines are available online at *http://www.odnetwork.org*.

## Member Benefits

Low annual dues provide members with a host of benefits:

- Free subscriptions to our publications.
- Free access to online job ads in the OD Network Job Exchange.
- Discounts on conference registration, OD Network products (including back issues of this journal), Job Exchange postings, professional liability insurance, books from John Wiley & Sons, and more.
- OD Network Member Roster, an essential networking tool, in print and in a searchable online database.
- Online Toolkits on action research, consulting skills, and HR for OD—foundational theory and useful tools to enhance your practice.

## Professional Development

OD Network professional development events offer cutting-edge theory and practice. Learn more at *http://www.odnetwork.org*.

- OD Network Conferences, held annually, provide unsurpassed professional development and networking opportunities.
- Regular webinars include events in the Theory and Practice Series, Conference Series, and OD Network Live Briefs.

## Online Resources

In addition to the online resources for members only, the OD Network website offers valuable tools that are open to the public:

- Education directory of OD-related degree and certificate programs.
- Catalog of OD professional development and networking events.
- Bookstore of titles recommended by OD Network members.
- Links to some of the best OD resources available.
- E-mail discussion lists that allow OD practitioners worldwide to share ideas.
- Lists, with contact information, of regional and international OD networks.
- Case studies illustrating the value of OD to potential client organizations.

*Mark your calendar!*

# 2017 OD NETWORK *Annual Conference*

## October 14-17, 2017

## Loews Chicago O'Hare

*Learn more:* www.odnetwork.org/2017Conference