



**Cohesive**  
Solutions  
A BENTLEY COMPANY

# Tracking and Monitoring Continuous Improvement Initiatives

Nov 18, 2020



# Company Highlights

**IBM Maximo**  
One of the largest resellers and implementers of IBM Maximo in North America, with over 200 Asset and Work Management projects

**IBM's Highest Accreditation for Maximo**  
Largest body of certified Maximo consultants compared to any other IBM Partner

**Industry Best Practices**  
Deep industry subject matter expertise in business and work processes

**Performance Management**  
Award winning solutions that enable organizations to continuously improve and Achieve Operational Excellence

**Rich Industry Experience**  
Utilities, Oil & Gas, Manufacturing, Facility Management, Aerospace & Transportation, Nuclear

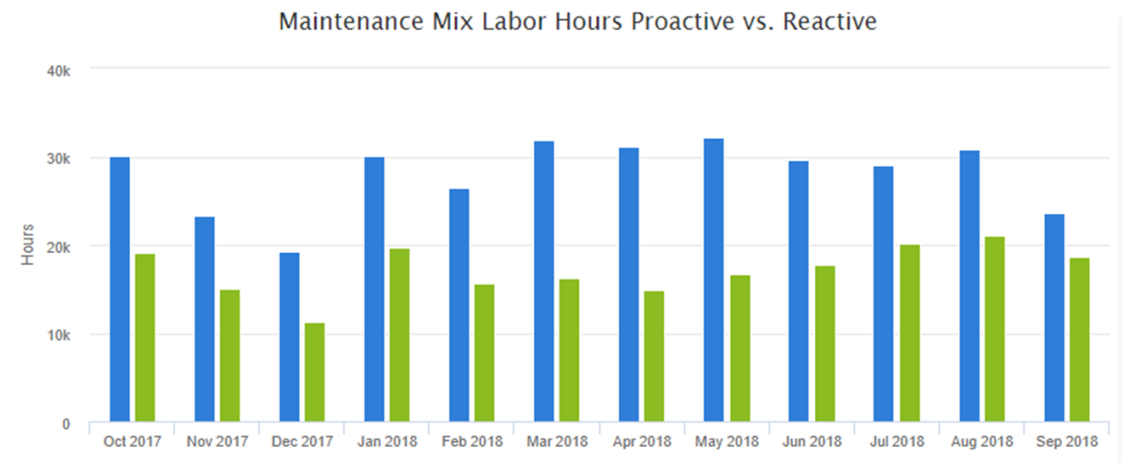


# Propel™ - Performance Management

## Bridging the Gap Between Strategy and Execution

- Align people and processes with objectives
- Identify and assess operational risk
- Visualize impacts and outcomes of continuous improvement initiatives
- Transform *trustworthy* data into actionable information
- Manage continuous improvement initiatives to achieve targets
- Operationalize and Automate performance management

- Performance Management Service
- Assessment
- Real-time performance metric visualization solution
- Rapid Implementation “weeks, not months or years...”
- Visualize, Align, Act



# Presenter – Matt Midas

VP Performance Management Solutions



## Work Experience

- USMMA
- US Navy
- Charleston Naval Shipyard
- Service Master Facilities Management
- PSDI/MRO Software
- Genesis Solutions/ABS
- Solufy/Prometheus Group

## Knowledge Base

- 30+ years in Engineering & Maintenance Management
- Overhaul and Repair (S5W/S6G Reactor Plants)
- Performance Management
- Reliability Centered Maintenance
- Planning and Scheduling
- Business Process Development & Improvement
- Work Management
- Safety Programs
- Maintenance Strategy / Optimization

# Presenter – Joe Lonjin

Performance Management Consultant



## Work & Client Experience

- Stanford Healthcare
- Corning
- Arizona Public Service
- Penn State University
- Lockheed Martin
- Northrop Grumman
- Cheniere Energy
- Colonial Pipeline
- US Army

## Knowledge Base

- 20+ years in Facilities & Maintenance Management
- Performance Management
- Data Quality
- Project & Change Management
- Business Process Development & Improvement
- Work Management Workflows, Analysis & Implementation
- EAM Functional Specifications
- Maintenance Strategy / Optimization



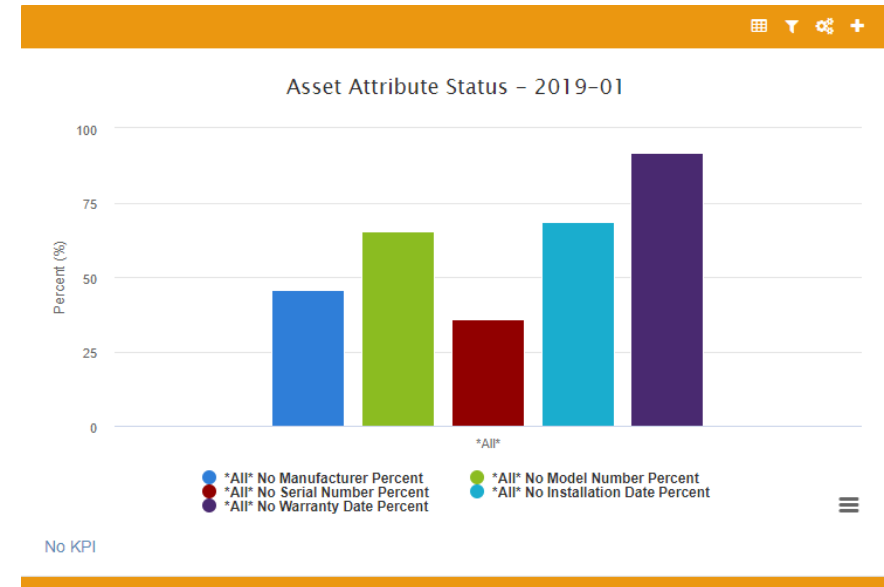
# Overview & Takeaways

- Your objectives must be well defined.
- There must be alignment between objectives, your processes and the data to achieve the desired outcomes.
- You need to understand your data in order to establish the right measures.
- What we measure impacts how well we can focus on improving things.



# Why Do We Monitor and Measure?

- Tracking of performance/actions
- Trending of activities
- Control/manage
  - Output
  - Safety
  - Process adherence
- Improve
  
- *“It is not possible to manage what you cannot control and you cannot control what you cannot measure” – Peter Drucker*

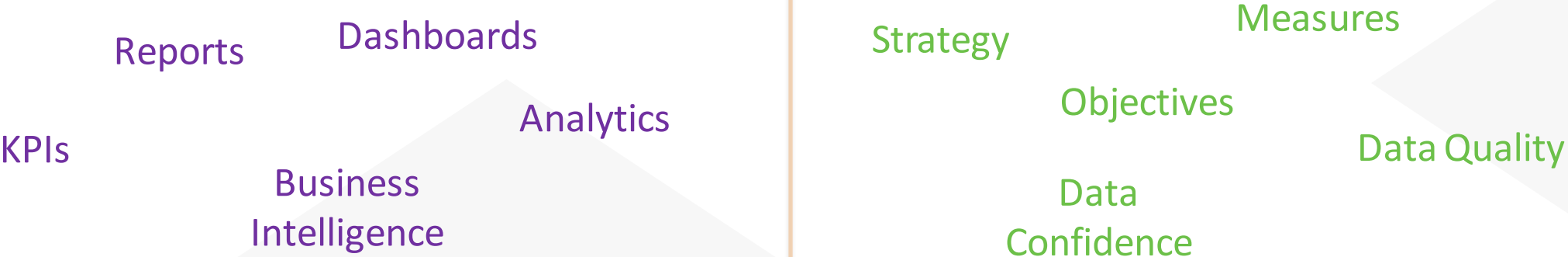
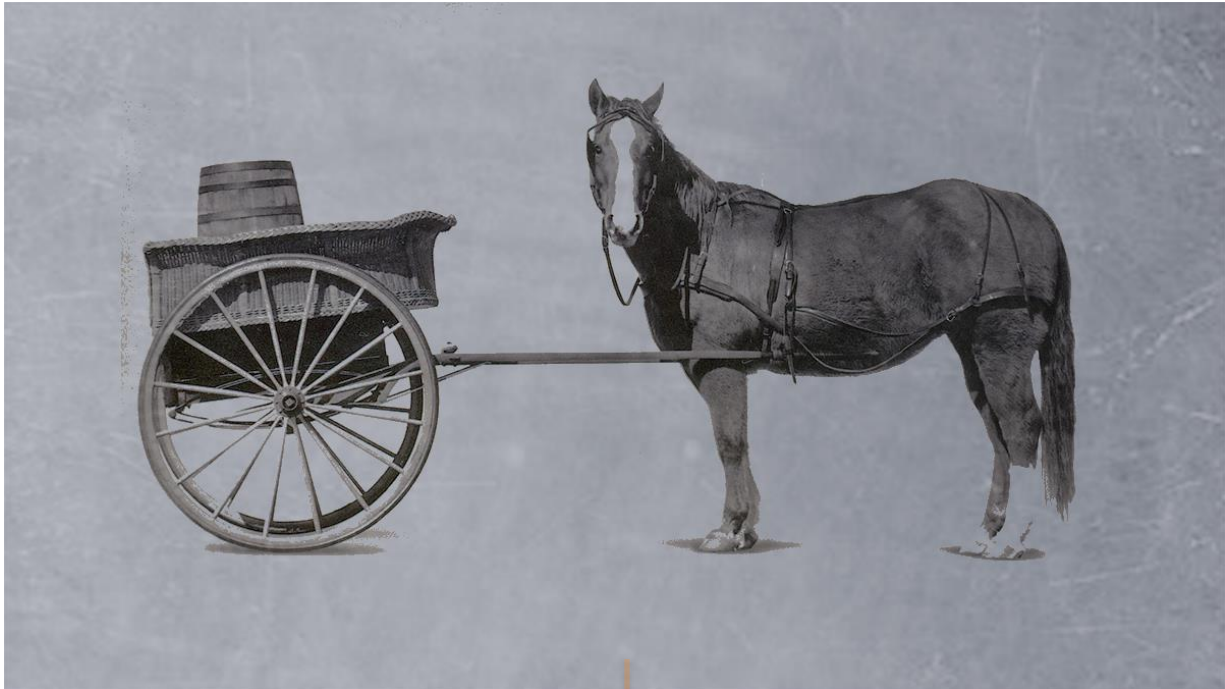


# Change, Improvement, Continuous Improvement

- If you are not improving, you are falling behind.
- Any change requires measures to track
- How do you track and monitor
  - Set proper goals that can be measured effectively
  - Align actions to objectives/goals
  - Establish measures based on the goals/results, not actions
- *"It's a common misconception that KPIs need to be SMART to be effective. Yet, in fact, there's no such thing as a SMART KPI – it's your objectives or goals that need to be SMART." - Bernard Marr*



# Don't Put the Cart before the Horse



# A More Appropriate Sequence

- Ask the Questions first – What are we trying to achieve?
  - Define/Identify Objectives based on Strategy
- How to Answer?
  - Define Measures based on Objectives
- Will We Believe the Answers?
  - Does Our Data Quality and Data Confidence indicate Trustworthiness?
- Set Baselines and Define Targets and Expectations
- Visualize
  - Reports, Charts, Dashboards, etc.
- Achieve Outcomes
  - Respond to Results, Communicate, Collaborate
- Sustain
  - Review Initiative Results
  - Review and Adjust Ongoing Objectives, Measures, Targets, etc.

Horse



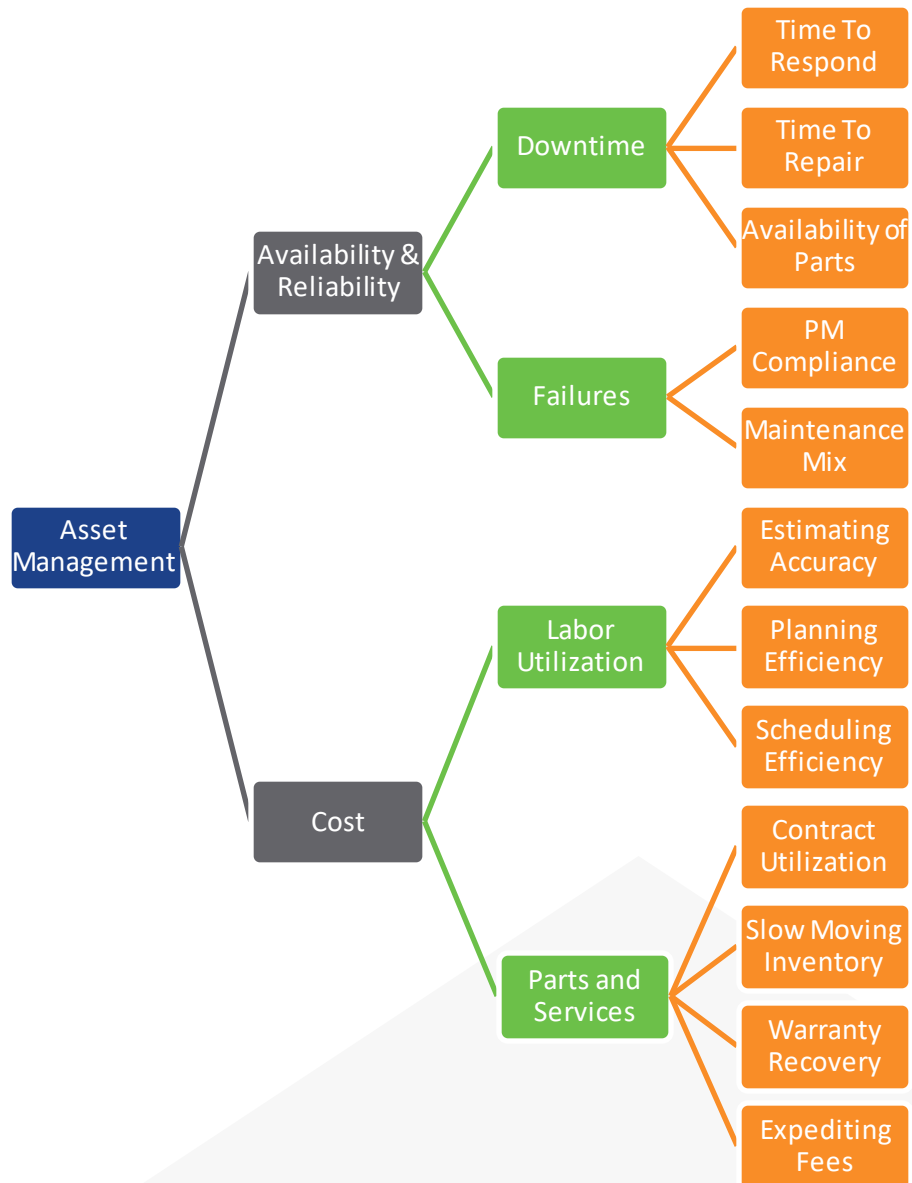
Cart



Trip



# Ask the Questions First - Become Objective Driven



- Define/Capture Operational Objectives in order to drive process and data requirements, rather than the other way around (data-driven)
- Understand relationships - how lower level (leading) objectives support higher level objectives (lagging)
- Ultimately, Visualize Performance (KPIs), Activities, Planned and Active Initiatives **in an Objective context**

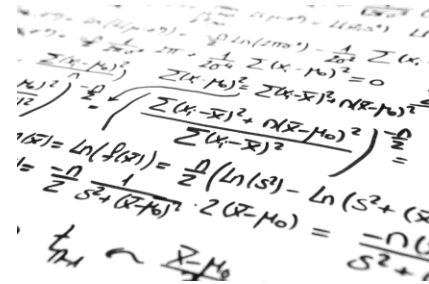
# How to Answer – Define Measures based on Objectives

1 Define your measure in the context of the Objective

2 Validate alignment between Objective, Process and Data



Objective



Measure



Process

A screenshot of a data table with columns for Work Order, Description, Location, Asset, and Status. The table contains several rows of data, including work orders for pump inspection and lubrication.

Data

## Types of Misalignment

- Defining the Measure based on as-is Process and available Data – doesn't align with Objective
- Measure is defined based on Objective, but Process doesn't align with Objective
- Process does not generate or collect required Data

# Will We Believe the Answers - Trust in Data & Processes

- Trustworthy Information – trustworthiness refers to an information system’s accountability and its ability to produce reliable and authentic information and records. *Trustworthy* denotes integrity, ability, faith, and confidence.
- Data Quality – the condition of a set of values of qualitative or quantitative variables. There are many definitions of data quality but data is generally considered high quality if it is fit for its intended uses in operations, decision making and planning.
  - Specific to Measures and KPIs – a measure of the ability of data to be used as a basis for the calculation of a measure/KPI
- Data Confidence – the level of trust an organization can place in data based on characteristics such as System and Process Integrity, Completeness, Currency, and Governance

# Demonstration



# What is Propel?



Propel offers integrated capabilities for organizations focused on managing outcomes and sustaining organizational performance.

Propel offers capabilities that:

- **Align business processes with objectives**
- **Visualize process performance using pre-built metrics & KPIs**
- **Identify & Address Data Quality opportunities**
- **Manage continuous improvement initiatives**
- **Enable rapid response to arising conditions**
- **Automate business condition monitoring**
- **Facilitate team communication/collaboration**

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# Networking



## Contact Us:

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