



## How Are You Tracking?

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Most people will readily agree that tracking is a necessary component of managing and improving any process. But what should you track? How should you use the data?

Below we answer these questions with an excellent list: eight possible data elements at the start of the project, four to update during the project, and five more at the conclusion.

But you do not need all of them!

Choose from this list and keep it short and simple so that the project leaders are not overwhelmed with requests. It is not the quantity of data elements you gather that matters, but rather how effectively you study and act on the data.

### Information to Gather at Project Launch

Some information is important to capture at the outset. You can collect this information from the team charter and enter it into a data collection sheet.

Customize and use the Project Tracker from the Conway Charting Solutions Plus, or develop your own. You may want to maintain a high level spreadsheet with key data with hyperlinks to supporting documents such as the team's full charter.

WHAT TO GATHER	HOW TO USE IT
<b>Names of participants, leader, and sponsor</b>	Keep track of how many people have experience and with what types of projects and in what role. Use this data to help you form future teams with a mixture of experienced people and people new to process improvement.
<b>Department, function, area or scope</b>	See where improvement activity is taking place. Compare the current activity to your organization's strategic needs for improvement. Identify areas that need more attention.
<b>Problem statement and/or objective</b>	Prioritize attention and resources to the projects tackling the most critical problems.
<b>Start date</b>	Often the date the charter is finalized, this enables you to measure how long your projects take from start to finish.

GATHER EXPECTED BENEFITS DATA	HOW TO USE IT
<b>Type of benefit expected:</b> such as increased capacity, reduced material cost, reduced accidents, increased sales, reduced people time required, etc.	For projects designed to free up capacity or people's time, make sure the organization has a plan to put the extra capacity or freed up time to good use.  For projects that increase revenue, make sure appropriate capacity is available to satisfy increased demand — or launch a companion project to increase capacity at the bottleneck.



<p><b>Dollar value of expected benefit:</b></p>	<p>Study the variation between expected and actual for insight into what you can do to improve your organization’s process for improving the work.</p> <p>This information is the most difficult and uncomfortable to estimate. In theory, the expected benefit can be derived from an effective problem statement and objective; but in practice many problem statements are not as crisp and complete as they should be. Often the waste has not been well-quantified. Furthermore, many project leaders sense only downside personal risk in estimating benefits.</p> <p>Ask your project teams to take a stab at it, recognizing that these estimates may be wildly off.</p>
<p><b>Expected time frame for results:</b></p>	<p>Study variation between expected timeframe and actual to identify what affects time to completion and the steps you can take to accelerate results.</p> <p>This estimate is second only to ‘expected dollar value’ in difficulty for a project leader to put on paper, because there are many factors that will be beyond the project leader’s control.</p> <p>Use this data to identify and eliminate causes of delay so that improvements come faster and faster.</p>

**Information to Gather at Planned Intervals**

Periodically (no more often than monthly even though quick projects may have only one update), update your spreadsheet or database with the following data:

<b>WHAT TO GATHER</b>	<b>HOW TO USE IT</b>
<p><b>Project Status</b> (i.e., On track? Pending? Stuck? Discontinued? Complete? Proposed but not yet started?)</p>	<p>Provide the right assistance to any project that is stuck or pending.</p> <p>Collectively, identify whether you have the optimal mix of projects. For example, if you find a large number of discontinued projects, revisit the process you use to identify and launch a project. Monitor the number of improvement projects in the pipeline. For your stalled and pending projects, identify and address common causes that slow your organization’s pace of improvement.</p>
<p><b>Point in the Process</b> (for example, Gathering Data? Analyzing Root Causes? Piloting Solutions? Evaluating Results? Standardizing?)</p>	<p>Illustrates whether your portfolio of improvements is well-balanced. Are you implementing a number of solutions at once? If most projects are winding down, begin to increase the number of improvement ideas in the pipeline.</p>
<p><b>Revised estimates of benefits and completion date</b></p>	<p>Provides you with most current information. Improvement projects are learning experiences, and teams often learn that their starting assumptions were not complete or correct. Changes can affect estimates of benefits and completion date.</p>
<p><b>Any comments from the project leader</b></p>	<p>Each update is an opportunity to capture important information about changes to status, expected benefit, or expected completion dates.</p>



**Information to Gather at Project Completion**

When an improvement effort is completed, you have an opportunity to gather the results data. Some projects will be big hitters and provide big returns, while many others will have modest gains. Some may not contribute any results to the bottom line, but can yield individual and collective learning that leads to better results in the future.

The following information can be gathered at the end of the project:

WHAT TO GATHER	HOW TO USE IT
<b>Final estimate of benefits achieved</b>	Use this to identify where the process needs improvement in training, resources, methods, etc. in order to increase overall success.
<b>Completion date</b>	Baseline how quickly results are achieved and identify opportunities to accelerate results.
<b>Learnings:</b> What the team felt went well; what the team would do differently if they knew then what they know now	Capture team learnings to ensure the team articulates and debates lessons learned. This also enables the lessons to be shared – to accelerate organizational learning.
<b>The most significant problems or obstacles</b>	Identify problems common to more than one project. Prioritize and address the most significant opportunities for improvement.
<b>Additional opportunities for improvement projects</b>	Nearly every project encounters further opportunities for improvement that are beyond the team's scope. By capturing these opportunities, you have a constant source of improvement opportunities to prioritize and address.

Individual project teams are focused on improving the work, and one project will differ significantly from another depending on: the problem or opportunity addressed, the functions or departments engaged, and the skill and availability of the leader and participants. By identifying and tracking key elements of the entire portfolio of improvements, you can identify your organization's strengths and weaknesses in the improvement processes. From this information, you will know what you should do next to increase the organizational capability to improve further faster.