

# PREVIEW GUIDE

(Sample Pages from Leader's Guide)



## The Dashboard



PRESENTS

# The Dashboard

## A WORKSHOP ON MEASUREMENT AND SUCCESS

*Based on material developed by Dr. Stephen R. Covey*

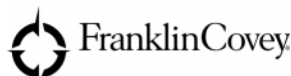
### LEADER'S GUIDE

Seek first to understand and then to be understood.  
Stephen R. Covey

Leader's Guide prepared by SkillBuilders, Inc., San Diego, California

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## **BACKGROUND**

*You can't manage what you can't measure.*

**Peter F. Drucker**

## **INTRODUCTION**

Almost everyone has heard Drucker's famous quote about measurement and management. We have all looked for ways to measure our department or organization's effectiveness, and to use that information to build our success. Today, with so much information available, we've created a new problem: what information is truly meaningful, and how can we get that information to those who can act on it?

### ***Workshop Purpose***

This brief workshop focuses on a unique approach to gathering and distributing information about the health of a business, using one specific company as an example. Through a detailed analysis of their business and a hard look at what information really mattered, this company found a way to share the data needed to guide their day-to-day efforts.

This workshop helps participants use this approach to look at the performance of their own department or organization, and begin to develop ways to measure it in an actionable and highly visual way.

### ***Training Design Overview***

This workshop kit provides a structured training design to support a fast-paced, 60-90 minute workshop. The workshop will help participants begin the process of identifying crucial information and ways to make it available to everyone who can act on it.

- The Presentation Script outlines the learning points and activities.
- The video program shows how one company went from good to great by pinpointing what really matters and sharing what they found with the rest of the organization.

### ***Learning Points***

After completing this workshop, participants will:

- Recognize the need for measurement within their department or organization.
- Identify metrics that can lead to improved performance.
- Begin to set up a plan to measure and respond to selected metrics.

## WHO SHOULD ATTEND?

CRM Learning's *The Dashboard* workshop is designed for all levels of employees: leaders, managers, and staff. Optional activities are provided to support discussions on the leadership, communications, culture change, and goal-setting aspects of measurement.

**Note:** The design of the workshop assumes that all participants are from the same organization.

### Group Size

Workshop material should be presented in a group setting where the responses of others can be shared. We recommend limiting the group to 12-16 participants to promote active discussion of the workshop topics.

### Self-Study

*The Dashboard* workshop material is not recommended for use as a self-study activity, although the video will be of value to anyone who watches it.

## TRAINING DESIGN

The workshop agenda runs 60-90 minutes depending on the use of optional activities. Workshop leaders are encouraged to add or remove activities from the overall plan to meet specific needs or time constraints.

Workshop Segment	Duration	Handout
<b>Welcome</b> Purpose of Workshop and Expected Outcomes	3 minutes	
<b>Discussion</b> Participants discuss how well they think they are doing at measuring organizational progress and communicating those results.	5 minutes	I
<b>Participant Introductions</b> Participants introduce themselves and share some thoughts about how they track their own performance and learn about the health of the organization.	3 minutes	
<b>Activity I: Dashboard Video</b> Video shows how one company took a whole new approach to measuring their success, and how it helped them improve their business – and successfully change their way of doing business. Group discussion.	16 minutes	Video

Workshop Segment	Duration	Handout
<b>Activity 2: Planning Our Dashboard</b> This activity will begin to build the department or organization's Dashboard. Working as a group, participants develop a list of metrics that meet performance measurement standards.	15 minutes	
<b>Activity 3: Getting Specific</b> The full group is broken into small groups to develop ways to gather and communicate key metrics. Each small group briefs the full group on their findings.	20 minutes	2
<b>Activity 4: Next Steps</b> Full group discussion of next steps to develop a dashboard.	10 minutes	3, Reference List
<b>Optional Activities</b> A set of optional discussion questions focus on leadership, communications, culture change, goal setting issues related to the development of a measurement system.	10-15 minutes each	4
<b>Workshop Summary and Wrap-Up</b> Review agreements made for next steps.	8 minutes	
<b>Total Time</b>	<b>80 minutes + Optional</b>	

## SYNOPSIS OF THE VIDEO

What if you had no way to keep score? It would make competing pretty difficult. What if you had a score, but didn't know what it meant – how would you know if you were ahead or behind?

In any department or organization, you need to know how you are doing on the important factors that lead to success or failure. And you need to share that information throughout the team so others can act on it.

What are the key factors in the effectiveness of your department or organization? For Younger Brothers Construction, a second generation family-owned business, they were quite simple: to build a good house on time and on budget. But what did that really mean? How could they tell if they were reaching that goal?

Although business was good at Younger Brothers, their CEO felt that things could be a lot better. In a series of on-camera statements, we see that people throughout the company had different ideas of the company's goals. And, from the CEO's point of view, they were constantly responding to symptoms, rather than fixing structural problems.

Working together, the management team set an overarching goal for the company: to build homes faster, better, and cheaper. To reach that goal, they realized they needed measures – concrete ways to see how they were doing in reaching their goals. They were tired of looking at spreadsheets and charts, and wanted a simpler, more obvious way to see how things were going.

## PRESENTATION SCRIPT: *THE DASHBOARD*

This workshop is designed to be presented in a 60-90 minute session. It assumes that all participants will be from the same organization, but may be from different departments. The workshop can be facilitated to examine *Dashboard* concepts at either a departmental or organizational level. Optional activities based on the makeup of your participant group will add 10-20 minutes.

**Note:** To avoid distraction, please hand out the worksheets when they are needed - not all at once at the start of the workshop

### **Welcome: Purpose of Workshop and Expected Outcomes**

*Time: 11 minutes*

SHOW SLIDE 1: WORKSHOP TITLE



INTRODUCE yourself and make a brief comment about your own interest in the topic of measurement as a vital component of organizational effectiveness.

ASK

**Look for brief responses as you ask the following questions:**

- **How are you doing this morning?**
- **How do you know?**
- **How do we, as an organization (or department), know how well we are doing?**

SAY

**If we were to create a dashboard, what are the key measurements that are most important to help us direct our organization (or department)?**

**Let's brainstorm and come up with items we could measure that meet the three standards on Slide 4. After we brainstorm a list, we'll work together to reduce it to the most important and useful ones.**



FLIP CHART

Working as a group, have the participants:

- Develop a list of metrics that meet the standards on Slide 4.
- Discuss how important each metric is to the success of the organization (or department).
- Cull the list to reduce it to the most important metrics. Write all of their responses on the flipchart, and then review the list to reduce it to the 5-7 most important indicators.

### Activity 3: Getting Specific

*Time: 10 minutes*

**Overview:** Participants focus on identifying needed business intelligence.



WORKSHEET 2: DATA GATHERING AND SHARING

Pass out **Worksheet 2: Data Gathering and Sharing**

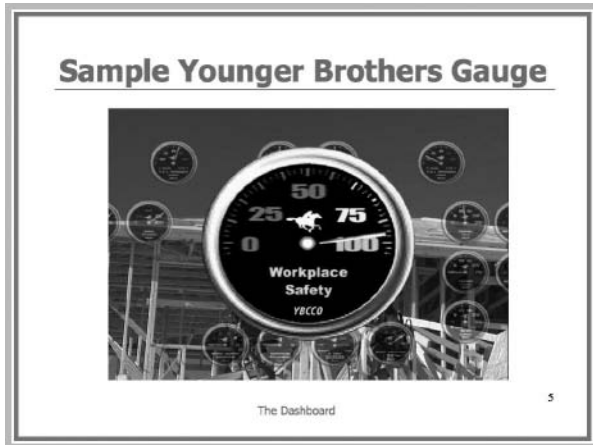
Divide participants into pairs or small groups, depending on how many are in the session.

SAY

**Each small group will be assigned one (or more) of the key metrics listed in Activity 2. In this activity, you will develop the metric in terms of the factors on Worksheet 2.**

- **Where appropriate, identify a responsible person (or persons).**
- **Consider how it can be depicted on a dashboard.**
- **Here's a close-up of one of Younger Brothers' dashboard items – yours does not have to look anything like this!**

SHOW SLIDE 5: SAMPLE YOUNGER BROTHERS GAUGE



Begin the activity. Have the participants fill in the table on Worksheet 2.

Issue
What information needs to be gathered? By whom?
How will it be gathered?
Where will it come from?
How often can it be gathered?
How often should it be shared/communicated?
Who should communicate the information and with whom should it be shared?
Are there any obstacles to gathering or using this information?
How can we depict the data on a dashboard?

### Activity 3: Discussion

Time: 10 minutes



FLIP CHART

Each pair or small group briefs the full group on their findings. Write their ideas on the flip chart.



## WORKSHEET 2: DATA GATHERING AND SHARING

### Part 1

Metric or factor to discuss: \_\_\_\_\_

Issue
What information needs to be gathered? By whom?
How will the data be gathered?
Where will it come from? From whom?
How often can it be gathered?
How often should it be shared/communicated?
Who should communicate the information and with whom should it be shared?
Are there any obstacles to gathering or using this information?
How can we depict the data on a dashboard?

### Part 2

What are the next steps to develop our dashboard?

## Materials Included With *The Dashboard*

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- ◆ The **chaptered DVD** of *The Dashboard* shows how one company went from good to great by gathering and distributing information about the health of their organization. The video is closed-captioned.
- ◆ The **Leader's Guide** provides step-by-step instructions for introducing activities, leading discussions, and making transitions between the video, group discussions, PowerPoint slides and exercises. One complete 80-minute training design is included, and offers options to help you lengthen your workshop with additional activities and discussions, as desired. Reproducible participant worksheets are included in the back of the Leader's Guide.
- ◆ A **CD-ROM with the PowerPoint® presentation** can be used to highlight key content and discussion points during the training session. Additionally, the **participant worksheets** are included on the CD in .pdf format.

# For more information...

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