Open Discussion
Enterprise Assessment Diagnostics: Lessons Learned from LAI Members

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April 2, 2009
Session Intent

• Topic area is broadly - assessment
  • Interest in a common diagnostic methodology
  • Motivated to achieve clarity, standardization, normalization, or benchmarking on this topic

• Approach
  • No presentations of what has been done
  • Interested in discussing aspects of assessment that vex participants in achieving assessment objectives
  • Sharing what you learned in doing assessments
  • Sharing what you would do differently
  • Record the discussion

• Outcome
  • Compile the accumulated knowledge and perhaps consensus “most successful” approaches
  • Publish to the participants via email
  • Guide the development of LAI’s LESAT version 1.5/2.0
Ideas of how to How to Frame the Discussion

• Agree to topics to be discussed
• Split time between each agreed topic saving time for a wrap-up
• Record the key points of the discussion
• Review these key points and mark those items that are most important
Topic Suggestions

• Possible topics of discussion
  • Principles and Practices...the basic vision and tenants that this process must align with to be relevant in the enterprise culture
  • Methodology...how we would use this to make a difference in our business
  • Model...The design and content of the actual diagnostic that are consistent with the above
  • Assessing the results, engaging enterprise leadership
  • Balancing assessment brevity with thoroughness
  • Others …
Agreed Approach

1. What is the interest in actually using a common diagnostic? Proprietary models are seen as a competitive advantage…

2. If yes, what is the process for updating LESAT?

3. What’s the value/purpose of an assessment, how will it be used, at what level, and who with/for?

4. A scalable model and how the tool is interpreted?

5. One-off vs. recurring event model? RR used annual (recurring) model

6. How to minimize gaming scores and process impact on organization?

7. Where/how has the current model not worked?
What’s the value/purpose of a lean assessment, how will it be used, at what level, and who with/for?

- Serves as learning event, knowledge transfer *
- Outcome must inspire/indicate action e.g., begin dialogue, drives progress, deployment strategy*
- Measures effectiveness of strategy
- Link to the past, longitudinal comparison tool
- Is it a pull or push process?
- Let’s develop a set of LAI recommendations to drive use of common tool/taxonomy (LESAT)
- Need to understand the phenomenon of better educated self assessors, score variabilities
- Value of metric/score dependent on company culture (gaming issue)
What is the interest in actually using a common diagnostic? Proprietary models are sometimes seen as a competitive advantage...

- Common framework*
- Common, understandable approach for suppliers*
- Enterprise tool supplemented by unit-specific modules (PD, etc.)*
- Assessment of current state of leadership and enterprise level
- Comparability w/o getting bogged down in comparing actual scores
- Any metric can be made into a weapon; metrics can also provide context for comparability
- Cost savings in common model
- How to achieve commonality in the tool?
- Model not proprietary but the results are
- Issue of outside assessors…
Scalable model and how the tool is interpreted

- Common tool would also lead to common lean principles, language, and taxonomy*
- Validation, accountability, interpretation*
- What about a cross-industry tool? LESAT has some manufacturing-specific bits but could be applicable in other contexts, has a services flavor*
- Enterprise, function, level?
- Maturity?
- Can a single tool work for level and maturity? Does it require multiple tools or perhaps a suite of tools?
- Maturity levels easily scalable
- Boeing is open to sharing/using a common tool
- Develop a common baseline/core module (lower than LESAT) as first step
- Version 1.5 will capture this
- LESAT synthesizes LAI’s other research…unique benefit
How to minimize gaming scores and process impact on organization?

• Self assessments followed by additional assessments are problematic…
• Creating safety/keeping scores within the team (team sense of ownership) enables more honest conversation (Raytheon experience)*
• What is acceptable evidence of improvement other than a score?
• Avoid gaming by not averaging scores
• Length of assessment? Preparation for assessment risks creating false situation
• Assessment results risk being overwhelming…outside assessors can help winnow the list
• Scores as a window to more meaningful discussion
• Use of scores more important than their existence
What have we learned?

- We would like to use a common tool; will discuss within individual organizations
- Willingness to share at sub-module level
- We’ve established a new community of practice
- Items with * indicate agreed-upon starting points
- Can we look at making language more common?
- Stamp out/beware of circularity
- Group wants input into Version 1.5
- LESAT out in 2001, 1.5 will capture subsequent learning and experience within LAI team. Then open discussion to LAI and collectively develop 2.0. A few practices will be introduced, some will be changed...1.5 will be an updated draft circulated to LAI