enlighten
operational excellence

Enlighten OPEX

On-Site Assessment

Overview, Benefits and Deliverables

ENLIGHTEN ON-SITE ASSESSMENT

The Enlighten Operational Excellence (OPEX) On-Site Assessment is the fastest way to obtain a measured evaluation of current operational effectiveness. Typically completed within a week, the on-site assessment will uncover the potential for accelerating efficiency and productivity by focusing on value-added standards. The result is new insight and actionable findings. During the assessment, Enlighten experts review your operations using a unique methodology to identify and quantify the portion of your operational activity that is adding value to the business. Enlighten then uses these derived value-added standards to gauge current overall effectiveness and to accurately project the impact that a metrics-supported, value-added measurement framework could have on your business, when combined with the Enlighten OPEX methodology.

GETTING A "VALUE-ADDED" BASELINE

Using a value-added standard of measurement that reveals "ideal" processing times for all the back-office activities conducted in a business is revolutionizing for most organizations. The assessment is an opportunity to have expert analysts determine how close you are to achieving "ideal" standards. The value-added, or "ideal", standard is a measurement of what is possible in your business when waste is eliminated. The value-added standard is based on current processes and systems, so there are no system changes or process re-engineering involved in setting the standard. This gives your leadership team specific benchmarks, unique to your organization, against which to evaluate performance.

VALUABLE ANALYSIS AND FEEDBACK

While the purpose of the assessment is to collect enough information to determine opportunity and fit for Enlighten's operational metrics framework and transformation program, it also provides an operational analysis that is valuable in its own right and can help you understand and prioritize opportunities for improvement. Within a week, and with no disruption to your operation, you will have clear, specific and measured findings in your hands with projections for the operational improvement and near-term ROI possible with Enlighten's analytics methodology.

ASSESSING THROUGH THE LENS OF A BALANCED SCORECARD

The Enlighten assessment model ensures a "balanced scorecard" approach that is important for holistic understanding of operational performance. While the on-site assessment is heavily geared toward attaining value-added baselines and evaluating efficiency and productivity metrics, the Enlighten program relies on the multi-faceted balanced scorecard to achieve success and sustainability. The balanced scorecard provides a unique perspective on operational improvement that does not rely on any single metric as a measure for improvement. We don't just measure efficiency, we measure the important inter-relationship of efficiency, quality, employee engagement, customer satisfaction, and more. Because of this, the on-site assessment team will gather additional information, beyond the value-added baselines, to find areas of insight relating to these other operational success factors. Regardless of whether we see a fit for Enlighten's program after the assessment, you will have gained superior insight into the strengths and opportunities you have to better serve your customers and support the mission of your business.

BENEFITS SUMMARY

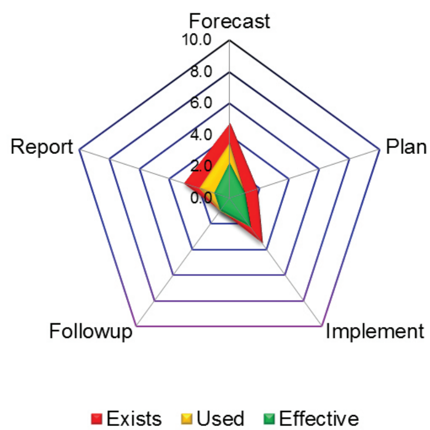
Benefits of the assessment include:

- Clear knowledge of the effectiveness of current operational practices and metrics
- Quantitative assessment of the operational improvement opportunity
- Realistic assessment of the appropriateness, need and organizational fit for Enlighten OPEX
- Identified path to an operational improvement program that provides multi-faceted value

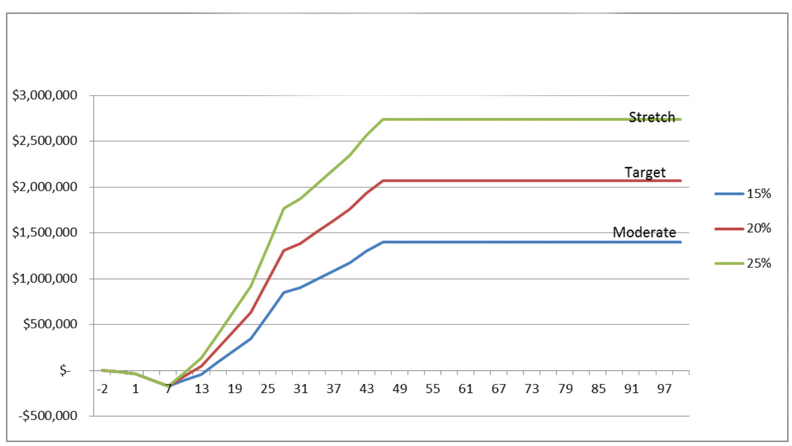
COMPREHENSIVE REPORT OF FINDINGS

Once the analysis is complete, you will receive a detailed report of the analysis and a path to operational improvement. The on-site assessment report details and graphs the value-added assessments, and evaluates operational management effectiveness.

Management Effectiveness Graph



Operational Improvement Opportunity Assessment



WHAT DOES THE ASSESSMENT ENTAIL?

Conducting the on-site assessment entails interviews, observation, analysis and presentation of results. Typically, between one and four analysts will visit your site to conduct interviews, collect information and observe typical operational activities. The on-site assessment usually can be completed in 2-3 days, but could take longer for a very large organization. The majority of our time on site is spent observing operations in action; we will not interrupt your ability to conduct business.

COLLECTING INFORMATION IN ADVANCE

In advance of the on-site visit, we will ask for some background information that will help us focus our efforts and complete the on-site assessment efficiently. Typically we will ask for information about organizational structure, historical volumes, employee (FTE) count by month, and the like. Most of the information we ask for is readily available in most businesses. Where this is not the case, we will collaborate with you to find suitable alternatives.

INTERVIEWING MANAGEMENT STAKEHOLDERS

Ideally we would like to conduct short interviews with a number of management stakeholders at the top, middle, and front-line of the operations area we are assessing. The interview process is structured and should take approximately one hour of each participant manager's time. Suggested list of interviewees would include:

- One top executive such as the Head of Operations for the business
- One or two upper-level managers in the operations hierarchy we are assessing (such as one top manager and one mid-level manager in a five-tier management hierarchy)
- A number of front-line managers (several to 15 or more, depending on organization size)

OBSERVING KEY ACTIVITIES

Observing your current operational practices in action is key to developing an accurate assessment, so we will ask to observe several team members as they perform routine work. Our analysts will simply sit with the people performing the work and take notes as they observe. We will work with your managers to identify team members to work with and the observation should not be intrusive in any way. The goal of the observation is to assess the value-added vs. non-value-added components of activities. We are not there to assess performance and we don't use stop-watches, so the entire process should be interactive, informal, and comfortable for your employees.

ANALYZING DATA AND PRESENTING RESULTS

In tandem with the interviews and observations, our experts will be aggregating and analyzing information using Enlighten's systematic methodology for operational performance modeling. Typically, the analysis is well underway by the conclusion of the on-site visit and we will be able to provide informal feedback and a preview of the final analysis for you or your executive sponsor by the tail-end of the on-site visit. We highly recommend scheduling a brief check-in meeting between the lead analyst and the executive sponsor near the end of the on-site visit for this purpose.

Once the on-site visit is complete, our team will complete the detailed analysis and prepare a comprehensive presentation of results. We are typically ready to present formal results to your executive leadership team within a week, and often within a couple of days, of completing the on-site visit. For example, if we book a three day on-site assessment for a Monday through a Wednesday, a formal presentation of results can often be scheduled for Friday of the same week.

Lastly is the presentation of findings and a chance to explore what a metrics-supported, balanced scorecard methodology could mean for your organization. Ideally, we will present findings on-site to your leadership team in a 1-2 hour meeting. We will also provide a comprehensive report of the assessment findings with specific and actionable insights as well as an organizational "fit" analysis and projections for improvement possible with a balanced scorecard approach.

FAQ'S

WHEN IS THE BEST TIME TO PERFORM AN ASSESSMENT?

When you are busy! There is no need to wait until you have down time to conduct an assessment. The ideal time for an assessment is when you are processing work and many of the typical activities that occur in the business can be observed.

WHAT SYSTEMS ACCESS WILL WE NEED?

None. It can be helpful to get output from some of the workflow systems you use, but these are typically standard reports of information that can be pulled easily. We will itemize specific requests as part of our information gathering. No direct access to systems is needed.

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