

## Metric Results

Note. The following provides a brief description of the contents of this Tab in the Manual and can be used to create the appropriate contents. See also the *CapacityWare*™ Administration Manual, Tab 3 - Creating Instruments, and Tab 6 - Displaying Results.

### A. Overview.

A Metric is an organization survey with a focused short-term outcome to determine if a particular strategy or set of strategies is working as intended. Whereas a workforce survey is normally conducted annually, the Metric is conducted as an interim data collection effort, normally quarterly. Project Metrics may even be conducted weekly or daily to determine if a project is meeting specific goals. This Tab provides a repository for Metrics that are completed in support of a change initiative launched as a result of the data contained in Tabs 1 through 5.

### B. Metric Data Collection Options.

**1. Approach Metric.** One example of a Metric is one that is completed before any work really begins in an organization change effort. From the standpoint of those organization customs and culture that are in place, the Approach Metric helps change agents determine those factors that will make it easy or difficult to change the organization's capacity. It provides a guidance system to help assure success. For example, it will be imperative that the workforce learn about the change effort through some regular periodic means, normally an informal newsletter. If there is no mechanism for communicating with the workforce in this way, it will be something that may have to be created before it can be used. This will increase the level of difficulty and potentially increase the cost of the effort as well.

**2. Baseline or Extracted Metric.** In some cases, there may be an existing survey or other data collection device that will allow a comparison between initial (or baseline) data and more current conditions (the Metric). When this is done, it allows decision-makers the option of reviewing strategies to determine if adjustments are required. It is not uncommon for initial survey data to be discounted by an organization's senior management until some subsequent actions are taken to validate that information. In other cases, early data is discounted because of some prevailing incident that may have skewed the data toward more negative numbers than expected. A Metric data collection effort can help validate or invalidate presupposed conditions.

**3. Project Metric.** As changes are implemented, Project Metrics may be used to determine if implementation is on track or need review during the implementation phase. The frequency of Project Metrics is directly related to the degree of importance associated with the change initiative. Collection of Project Metric data can be acquired from a variety of sources and processed centrally to determine process, policy, or organization elements that may need additional assistance.

**4. Anecdotal Metric Support.** Some other source of information may be needed or incidentally acquired that will add or detract from the validity of Metric results. These data must be collected and linked to Metric results to create a comprehensive picture of what is happening. If a customer complaint or suggestion process is in place, facilitators can look for information that supports or does not support data collected independently through a Metric process.

## C. Metric Displays.

**1. Stand-alone Data.** The *CapacityWare*<sup>TM</sup> system of change provides two important yardsticks for comparison as an organization undergoes change: the standard- gap, and the comparative progress methodology. The first is a standard "Ideal" condition that is established both by numbers and by condition descriptors. If, for example, the standard is a *Quality of WorkLife Index* of 6.5 and the current "number" reported by Metric results is a 4.5, then the gap represents the level and intensity of work to be done to achieve the standard.

**2. Comparative Data.** In addition or separately, survey or Metric results can be compared to the previous data collection effort to determine the rate and direction of change. This also allows the use of *CapacityWare*<sup>TM</sup> as an Event tracker to determine what Events have occurred that would influence the Index shifts from one measurement to the next. Certainly the more effective and efficient Events should be increased or supported more than less effective options.

## Summary

Collecting Metric data is a reliable way to determine if changes are occurring in the data representing conditions in an organization. A variety of potential Metric templates is available that make the creation of the Metric easy and responsive to the needs of decision-makers. As experience is gained through this methodology, continuous data collection can become a reality in any organization thereby cutting response time to adverse conditions to a minimum.