



seeing is believing: visual metrics displays

by lauren spiteri

Right thinking

- A visual metrics display (VMD) is a visible, visual representation of the progress you are making on your strategic objectives and your priorities, along with key how/who resolutions.
- A VMD can be front and centre of conversations about, and the management of, what matters within an organisation.
- A key challenge with VMDs is to identify the important stories in that data, and then visually tell the story in a way that provides truth and meaning.

Most organisations use some form of scorecard or dashboard to measure performance against their strategic plans. Sometimes these are only visible to a handful of senior staff. This risks the rest of the organisation being oblivious or disinterested in how the organisation is performing to plan or how individuals' efforts are contributing.

One of the newer tools available to help ensure that strategic plans are cascaded and aligned and to better manage the flow of strategic information throughout organisations is the Visual Metrics Display (VMD).

A VMD is a visible, visual representation of the measures that matter to the success of your objectives, the progress that is being made or not made, and the identification of some key how/who resolutions.

VMDs are not entirely new because they have long been common in manufacturing organisations, to highlight, for example, how many accident-free days have been clocked, or how many products have been shipped.

Today, there is a greater need to do it smarter. Data is now almost real-time, complexity demands new ways of achieving focus, organisational alignment is make or break, sustained continuous improvement is key.

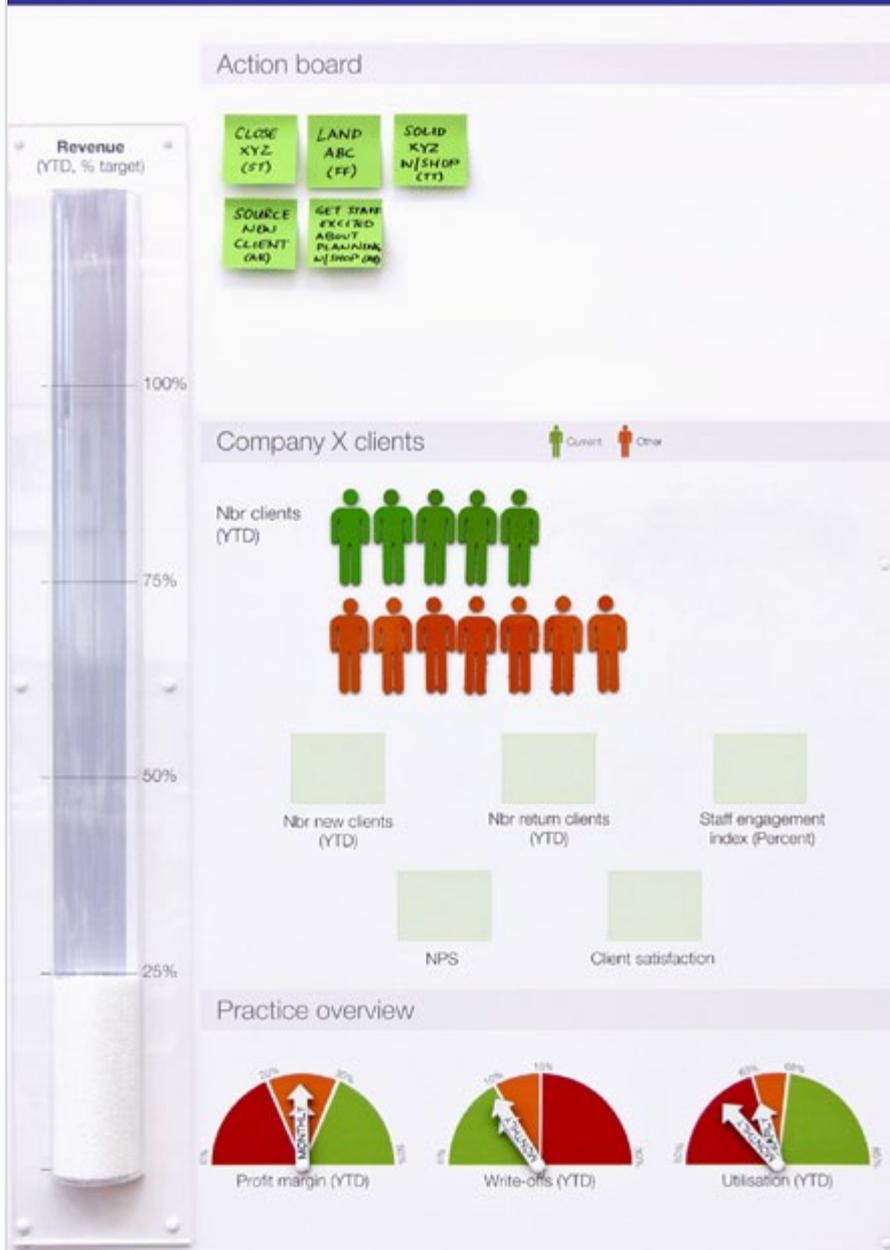
Organisations frequently display their vision in their shared spaces, but smart organisations find ways to link the vision with strategic plans and their implementation at every level. And as we live in a visual world, the use of wall-mounted 'visual metrics' can be transformational.

VMDs are a particularly powerful tool for organisations needing greater alignment to ensure a strategy's prospects of success, including those with staff with an inadequate understanding of their contribution, those seeking greater urgency to meet certain objectives, and those looking to break down silos.

What can a VMD do for your organisation?

A visual metrics display can align your organisation; keep priorities top of mind; ensure transparency when communicating to staff; and encourage the right conversations within the organisation (What are our goals? What's working? What needs to be fixed (quickly)? Who is responsible?).

Company X performance



Today, there is a greater need to do it smarter. Data is now almost real-time, complexity demands new ways of achieving focus, organisational alignment is make or break, sustained continuous improvement is key.

The benefits of a VMD

- Creating awareness and understanding of strategic objectives, and the building blocks of success.
- Creating more energy and focus around the measures that matter most.
- Encouraging understanding of individual and collective interdependence, collaboration and team ethos.
- Increasing individual and collective accountability for specific metrics and action items.
- Allowing teams to easily identify areas that are working or not working and make changes accordingly.
- Increasing awareness of progress towards the strategy and providing a 'winning' feeling and increased momentum.
- Promoting transparency through the organisation, especially when the metrics are used in regular 'stand-up' meetings.
- Celebrating what is working/going well.

What to consider when creating a VMD?

Like any good visual, a VMD needs to draw attention, and communicate clearly and quickly. They are fit-for-purpose: no two boards are the same, given the numerous variables of activity, size, maturity, geography, culture, focus, timeframe, competition, etc.

They are well designed, but they are not organisational wallpaper; rather, they are used actively and regularly within an organisation.

Here are some key questions to consider when developing your VMD.

1. What are the key measures?

Just like a dashboard on a car, too many measures can confuse. Focus on a small number of measures, those that really matter/are relevant and will make a difference to the performance of the organisation.

2. Can the measures be updated frequently?

Measures that might be updated weekly or fortnightly, and are thus 'alive' for current discussion and immediate focus, are more compelling and suitable for VMDs than, say, quarterly or semi-annual measures.

3. Do the separate measures add up to an integrated and relevant 'picture'?

It's important there is cohesion in what the VMD says, like building bricks in a wall.

Just as with powerful photographic or film imagery, or a compelling presentation or lecture, simple visual images can cut through and encapsulate a story; they illuminate, convince and motivate.

As Nathan Yau, who has worked on visualisation, statistics and design with clients such as CNN, New York Times and Mozilla, has written (2011): 'Face it. Data can be boring if you don't know what you're looking for or don't know that there's something to look for in the first place. It's just a mix of numbers and words that mean nothing other than their raw values.'

4. Are the measures able to be shared?

Whether there is one VMD or a series, information or measures are 'public', and will be informally shared across the organisation, so individual 'audience/s', or any sensitivities about the information and/or the relationships, needs to be considered.

5. How can the VMD be as dynamic as possible?

Will the measures be represented in a way that is interactive and easily updatable? Can elements be 'movable' such as dials, thermometers, etc.

6. Are insights at-a-glance easy to 'get'?

A simple visual image frequently has more cut-through, and impact, than any amount of figures or words; for example, big red circles highlight what is not working well, big green ticks for trends going well.

Visualisation can also involve traditional graphs, charts, thermometers and the like. But there are also techniques that can add a sharper sense of individual organisational relevance, even an entertainment factor. The important thing is to have a metrics board that is fit for purpose, and works.

7. Can data be gathered quickly?

Gathering data and updating the VMD for a weekly meeting should not be a full time job. Data should be easily accessed and the VMD should be simple to update (move an arrow, erase and replace a number).

8. How will action items be captured?

Action items underscore responsibility and accountability and therefore are an integral part of a VMD. Action items should have responsibility allocated and be specific to the timeframe until the next meeting.

How to use your VMD to encourage the right conversations

As a CEO of one of our clients observed, 'Our visual metrics board provides a format to bring staff together to discuss the business and to get staff interaction going.'

VMDs are well-suited to small, stand-up type meetings, so there is some intimacy in sharing the physical space, the content, the ideas and issues, and the actions and accountabilities.

At Right Lane, we use our VMD as a compass to guide our weekly team discussions about performance, with measures designed to provide both client and practice perspectives. Measures range from enablers such as client contact and servicing levels, to outcomes, such as new project wins.

Staff can easily see current and year-to-date performance against objectives and key issues arising in the previous week, and our conversations are geared to what actions we agree to undertake.

Our visual metrics meetings allow for staff to contribute insights and ideas that will make an individual or collective difference; they underscore the inter-dependence of people and productive activity.

Regular meetings like this, centred on the VMD, provide clarity and unity of purpose, and deepen understanding about the measures that matter. It's as simple and complex as getting the picture.

The visualisation of data is pivotal. If a picture is worth a thousand words, why take a thousand words? If you want staff to 'get the picture', then give them the picture not a zillion individual pixels. If seeing is believing, give them something to see and believe in.

Visual metrics, like signs in our cities, are a visual means to an end, meant to help people know and understand where they are, and help them find their way to a destination.

At Right Lane, we use our VMD as a compass to guide our weekly team discussions about performance, with measures designed to provide both client and practice perspectives.



Reference

Yau, N, 2011, 'Visualise This, The FlowingData Guide to Design, Visualization, and Statistics', Wiley Publishing Inc, p2.

want to know more?

If you'd like to find out more about Right Lane's potential to help your organisation develop and create a visual metrics display, contact **Lauren Spiteri:**

lauren@rightlane.com.au