# 10 Key Techniques to Optimize Your Evaluation Repository

## An Evalu+ Technical Paper

Optimizing an evaluation repository, in other words a set of evaluation criteria grouped by sections and sub-sections, is much more an art than a science. To fully achieve the goals of a particular evaluation, the corresponding repository needs to display be many important characteristics at once: exhaustive coverage of key variables influencing a desired output, unequivocal scoring guidelines, meaningfulness / "freshness" of the desired characteristics (e.g. no outdated best practices), applicability of evaluation criteria in the context of a given operational unit, no overlap/redundancy between evaluation criteria, content easily understandable to all stakeholders free of risk of misinterpretation, and last but not least full acceptance of the repository by all stakeholders. Take a quick look at your current evaluation repository(ies) and you are likely to conclude that some of these desired characteristics are not fully met today.

Here are 10 key techniques that, when properly apply, will allow you to thoroughly optimize any evaluation repository, not only at a given time, but throughout the lifecycle of the program in which it is used.

### 1) Clearly specify your evaluation goals

Write down in a few sentences what is it <u>precisely</u> that you want to achieve through a particular evaluation. Too many times, the evaluation goals are too vague or fuzzy, which eventually undermines the overall process, as there is a clarity around the very purpose of the exercise.

### 2) Clearly define your evaluation scope

It is critical to have a clear-cut definition of the evaluation scope, both in terms of organizational coverage (i.e. which organizational units will be included in the evaluation) and functional coverage (i.e. which functions / roles / processes will be evaluated). The more precise you are in this definition, the more end benefits you will get from your evaluation process.

### 3) Define your evaluation unit "tree"

The definition of an evaluation unit "tree" consists of specifying how you wish to segregate and consolidate your evaluation by operational units. Although it looks relatively straightforward at first glance ("just take our org chart!"), coming up with an optimal "tree" is actually quite challenging. Here are important guidelines that will help you get close to this optimal definition:

- Value the differences
    - Segregate as different evaluation units the parts of your organization whose type of operations differ sufficiently that they deserve to be evaluated separately. For instance: business units targeting markets with different dynamics, R&D labs specialized in particular applications, process vs. discreet manufacturing plants, products vs. services, B2B vs. B2C, etc.
- Don't go too granular
    - a common mistake is to define each physical or logical unit as separate evaluation units, which in most case leads to excessive complexity. It is OK to regroup several units under one evaluation unit if these units are sufficiently similar in terms of type of operations and reporting lines
- Aggregate smartly
    - Choose the aggregation logic that makes the most sense based on your evaluation objectives. Depending on the context, the logic can be based on the share of annual sales, GPD, headcount, gross margin, etc.

## 4) Create a task force

This task force will be responsible for coordinating the (re)shaping of an evaluation repository, which will subsequently become a compass for your organization. Don't be shy for this critical step - take your best people! Make sure that they not have sufficient knowledge of the reality of the units they will represent, but are also equipped with strong synthesis and interrelation skills. They will need these to properly handle the subsequent steps.

## 5) Start with a baseline evaluation repository

If you already have an evaluation repository, this step is an easy one. If you don't, it is highly recommended to find a 3<sup>rd</sup> party repository that is in line with your evaluation objectives. If you don't know where to find such existing repository, try first a web search, there are plenty of hidden gems out there! If your objective is to evaluate operational maturity or excellence, we suggest you to consider as a possible option the Evalu+ Operational Excellence Compass repository for that matter (since the repository is embedded in the Evalu+ application and can be exported to Excel, all you need is to do is request a free Evalu+ trial to get your personal copy free of charge). For further details on this repository, watch the following Case Study, which you can also access via the web site's use cases section.

## 6) Develop a first draft

To come up with a consistent first draft, it is recommended to proceed as follow:

- Send the baseline evaluation repository to the task force members, asking them to add, modify, remove, weight and/or reorganize sections, sub-sections and/or evaluation criteria, desired characteristics and associated content). Make sure to provide precise instructions as to how to format and submit these edits so that you don't get overwhelmed when it comes to synthesizing them. Please a strict deadline and cc the units manager so that they understand that the silence = approval rule applies.
- Nominate a task force member to analyze, reconcile and consolidate the task force members inputs, stressing areas of consensus, divergence and points requiring further discussion. Make sure that this task force member has the ability to make a sound judgment on each input and is able to properly argue with the author when one is deemed unfit for purpose (this will happen!). To achieve that feat, the designated task force member must have an excellent mastery of the chosen baseline repository, a good understanding of the organization's activities and ecosystem, be a quick learner and be gifted with strong synthesis skills.
- Distribute the outcome to the task force members and invite them to a workshop, whose objective will be to reach consensus on the draft repository and its relative application by evaluation unit (i.e. whether a particular criterion applies to a particular unit and if it does which weight should it be given compared to the other criteria)

### 7) Engage all other stakeholders

To maximize organizational alignment and commitment around the new evaluation repository before it becomes an official organizational compass, it is highly recommended to give an opportunity to anyone involved in or impacted by the upcoming evaluations to have a say on the repository content.

This stakeholder engagement phase should be performed in "3D", in other words the stakeholders should not only be able to comment on the repository, but also on the allocation and weighting of criterion by evaluation unit, as a whole, but also view which criterion has been allocated to which unit and at which weight (the allocation summary report of the Evalu+ application can facilitate this phase – see the "Match evaluation criteria with evaluation units" video tutorial for further details)

Place a strict deadline (1 to 2 weeks depending on the size of your repository) and make it crystal clear that silence means approval

### 8) Review inputs and strengthen consensus

It is critical that all inputs from stakeholders are processed and that all contributing stakeholders are informed of their contributions' fate. When a change request is discarded, a very precise and compelling explanation must be provided to guarantee full consensus.

### 9) Publish the repository

Once finalized, the repository must become an official document accessible to all stakeholders. The publication should be made in "3D" mode (see item #7), so that differences of evaluation logic from one unit to another are visible to everyone. It is also recommended to publish the evaluation unit "tree".

**10) Keep the repository and its allocations up to date**

Last but not least, it is quintessential that you put an efficient process in place to keep your repository up to date with your organizational changes (addition of organizational units, internal reorganization) and the changes affecting your evaluation criteria (e.g. reflection of new best practices related to ecommerce, Industry 4.0, etc.).

The repository maintenance should be placed under the responsibility of an official "owner", who should actively seek enhancement suggestions from stakeholders on a regular basis (social media platforms with the ability to comment on specific elements of the repository make it more efficient to manage the process and can help fuel whenever appropriate to healthy discussion forums.

With such maintenance process in place, your next evaluation never faces the risk of failing to deliver its expected outcome or of being resisted / rejected by parts of your organization.

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The Evalu+ solution can help you structure and maximize the efficiency of most of these activities, while Evalu+ consultants can provide you with expert advice throughout the process. Please contact us If you would like to discuss these contributions further.