

Decision Interface Assessment Scorecard



Assessment Scorecard

- The Decision Interface Assessment is a scorecard approach to assess our client's environment of people, process and technology.
- The purpose of the scorecard assessment is to provide client executives with a quantitative depiction of what are their company's strengths and weaknesses.
- Decision Interface's Assessment process
 - Present assessment methodology
 - Conduct interviews and gather data
 - Input and analyze scores
 - Review results and prepare reports
 - Present results

Present Methodology to Client



- Present overall methodology and depth of knowledge to the client.

People, Processes and Technology are critical to a utility's strong foundation



Conduct Interviews



- Conduct client interviews using the Interview Questionnaire created within the Decision Interface Scorecard Application. The interview process is conducted through group workshops of individual interviews.

DETA Scorecard Interview Questionnaire

Client: _____
Name: _____
Title: _____

Name: _____ Scorecard Item: _____

BU 1 - Marketing & Sales

Market Expansion - Mkt 1.1

_____ Strategy (Mkt 1.1) has been developed and documented
_____ Strategy (Mkt 1.1) has been implemented and implemented
_____ Strategy (Mkt 1.1) has been implemented (reviewed with Scorecard)

Market Expansion - Mkt 1.2

_____ Strategy (Mkt 1.2) has been developed and documented to support Strategy (Mkt 1.1)
_____ Strategy (Mkt 1.2) has been implemented and implemented
_____ Strategy (Mkt 1.2) has been implemented (reviewed with Scorecard)

BU 2 - Product Development

Product Development - Mkt 2.1

_____ Product (Mkt 2.1) has been developed and documented to support Strategy (Mkt 1.1)
_____ Product (Mkt 2.1) has been implemented and implemented
_____ Product (Mkt 2.1) has been implemented (reviewed with Scorecard)

Product Development - Mkt 2.2

_____ Product (Mkt 2.2) has been developed and documented to support Strategy (Mkt 1.1)
_____ Product (Mkt 2.2) has been implemented and implemented
_____ Product (Mkt 2.2) has been implemented (reviewed with Scorecard)

BU 3 - Operational Efficiency

Operational Efficiency - Mkt 3.1

_____ Process (Mkt 3.1) has been developed and documented
_____ Process (Mkt 3.1) has been implemented and implemented
_____ Process (Mkt 3.1) has been implemented (reviewed with Scorecard)

Operational Efficiency - Mkt 3.2

_____ Process (Mkt 3.2) has been developed and documented to support Strategy (Mkt 1.1)
_____ Process (Mkt 3.2) has been implemented and implemented
_____ Process (Mkt 3.2) has been implemented (reviewed with Scorecard)

BU 4 - Customer Satisfaction

Customer Satisfaction - Mkt 4.1

_____ Initiative (Mkt 4.1) has been developed and documented
_____ Initiative (Mkt 4.1) has been implemented and implemented
_____ Initiative (Mkt 4.1) has been implemented (reviewed with Scorecard)

Customer Satisfaction - Mkt 4.2

_____ Initiative (Mkt 4.2) has been developed and documented to support Strategy (Mkt 1.1)
_____ Initiative (Mkt 4.2) has been implemented and implemented
_____ Initiative (Mkt 4.2) has been implemented (reviewed with Scorecard)

BU 5 - Data

_____ Knowledge Management (Mkt 5.1) has been developed and documented
_____ Knowledge Management (Mkt 5.1) has been implemented and implemented
_____ Knowledge Management (Mkt 5.1) has been implemented (reviewed with Scorecard)

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Review Results & Prepare Reports



- Review scorecard results, prepare reports and determine the impacts to the client.

Assessment and Process Area - Summary Report
Client: Client 1 Scorecard Date: 5/1/2002

Report Area	Assessment Score	Score
Process Area: Planning & Strategy		
Business Strategy & Policies		2.07
Business Processes		2.07
Roles & Responsibilities		2.00
Support Systems & Infrastructure		2.40
Systems & Data		1.00
Process Area Average for Planning & Strategy: 2.07		
Report Area: Operations		
Process Area Average for Operations: 2.00		
Process Area Average for HR Management: 2.00		
Process Area Average for IT Management: 2.00		
Process Area Average for Risk Management: 2.00		
Process Area Average for Overall Organization: 2.07		

Assessment and Process Area - Detail Report
Client: Client 1 Scorecard Date: 5/1/2002

Process Area	Assessment Area	Score
Report Area: Planning & Strategy		
Scorecard Office: Planning & Strategy		
Business Strategy & Policies		
Business Strategy & Policies have been developed and documented		2.00
Business Strategy & Policies have been implemented & reviewed at least 6 months		2.00
Business Strategy & Policies have been distributed and implemented		2.00
Assessment Area Average for Business Strategy & Policies: 2.07		
Business Processes		
Business Processes have been developed and documented to support Business Strategy & Policies		2.00
Business Processes have been implemented & reviewed at least 6 months		2.00
Business Processes have been distributed and implemented		2.00
Assessment Area Average for Business Processes: 2.07		
Roles & Responsibilities		
Roles & Responsibilities have been documented		2.00
Roles & Responsibilities have been implemented & reviewed at least 6 months		2.00
Roles & Responsibilities have been assigned to roles to support the defined Business Processes		2.00
Assessment Area Average for Roles & Responsibilities: 2.00		

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Present Results



- Present the scorecard assessment reports to client executive management

The collage displays several report pages. The primary report is titled "Assessment and Process Area - Summary Report" for Client: Client 1, with a Scorecard Date of 5/1/2002. It lists various assessment areas such as Business Strategy & Policies, Business Processes, and Roles & Responsibilities, each with associated scores and a total score of 571. Other reports shown include "Assessment and Process Area - Detail Report" and "Solutions for Low-scoring Areas" for Projects #1, #2, and #3. The "Solutions for Low-scoring Areas" reports include sections for "Proposed Solution" and "Solution Costs", with a table showing Project, Process Readings, and Labor Costs.

Project	Process Readings	Labor Costs
Project #1	\$1	\$10,000
Project #2	\$10,000	\$40,000
Project #3	\$10,000	\$40,000



Scoring Measurement

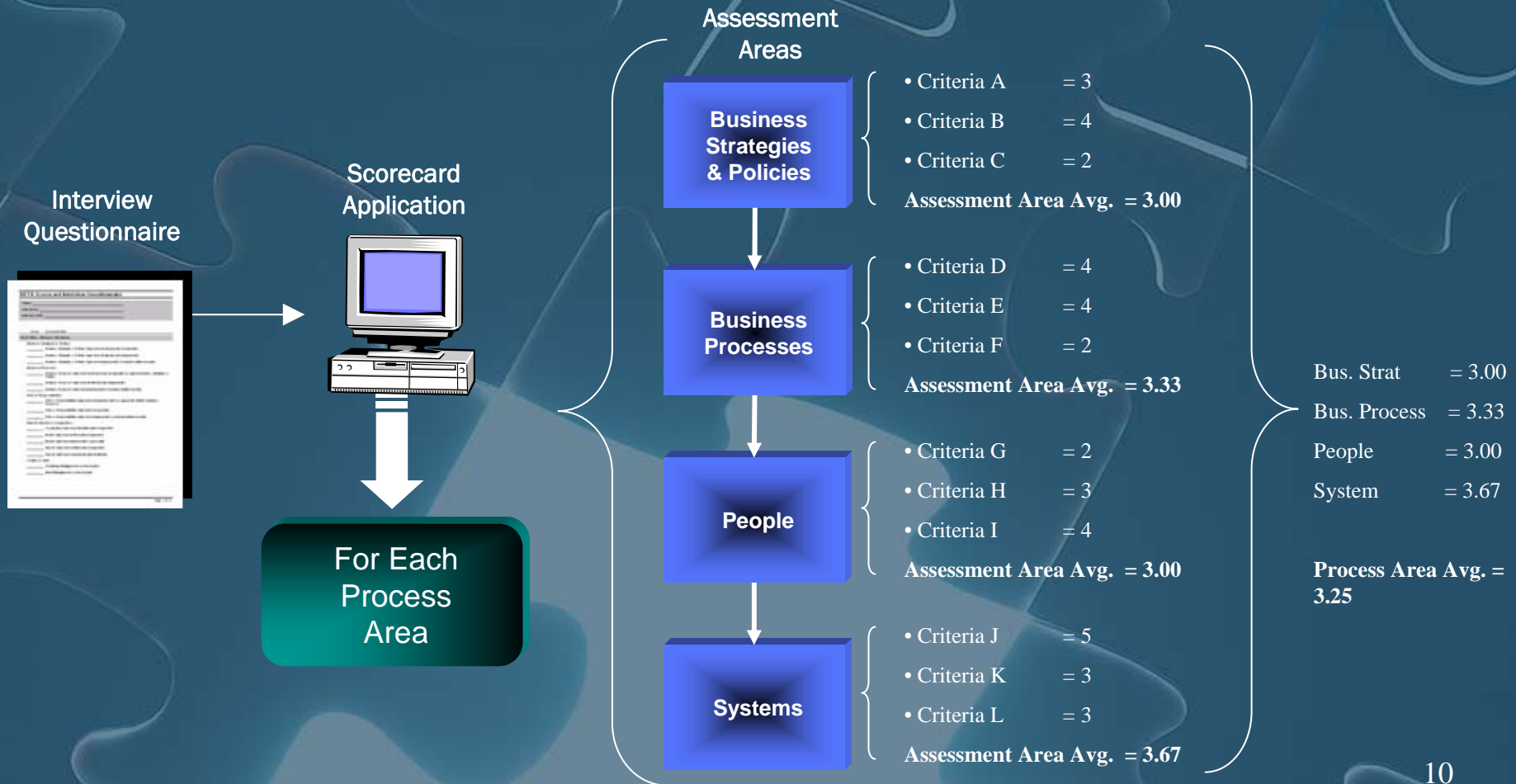
- The Decision Interface Interview Questionnaire includes criteria for each Assessment Area (e. g., Business Processes) and each Functional Area (e. g., Accounting).
- Each criteria is scored using the following rankings:
 - 0 = Non-existent**
 - 1 = Poor**
 - 2 = Fair**
 - 3 = Good**
 - 4 = Strong**
 - 5 = Exceptional**
 - NA = Does not apply to client's operations**
- The score for each criteria is entered into the Decision Interface Scorecard Application from the Interview Questionnaire.



Scoring Measurement

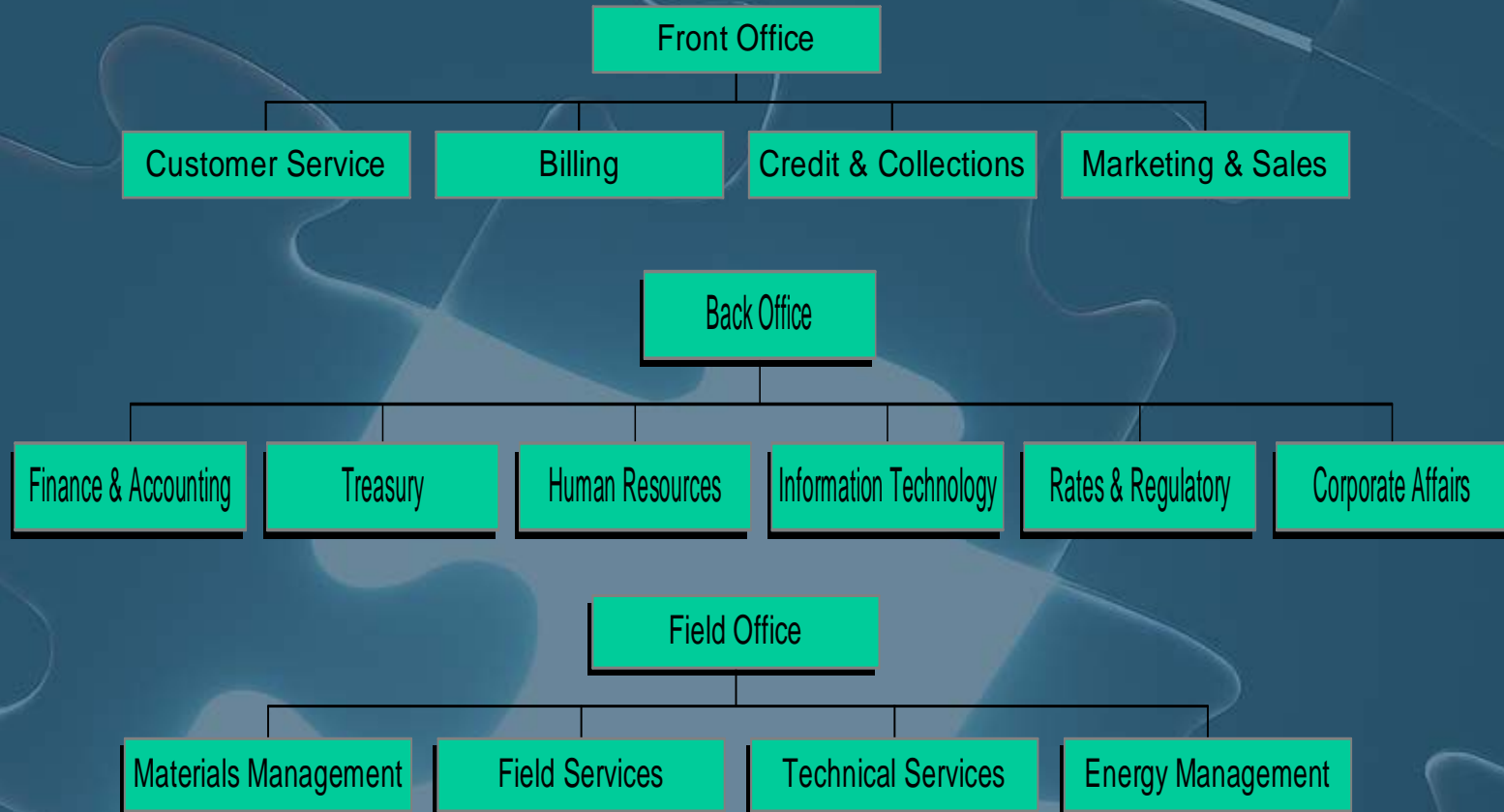
- Scoring criteria example for IT systems:
 - 0 = Non-existent- Applications in place do not support defined business processes
 - 1 = Poor- Applications in place partially support critical business processes, but systems limit effectiveness of business processes
 - 2 = Fair- Applications in place to support critical business processes, but no data validation is in place.
 - 3 = Good- Applications in place to support critical business processes and data validation is in place within critical systems to prevent human error where possible
 - 4 = Strong- Applications in place to support ALL appropriate business processes. Data validation is in place
 - 5 = Exceptional- Applications in place to support ALL appropriate business processes and data validation is in place. Systems are flexible to support changing business processes.
- NA= Does not apply to client's operations

Scoring Process



Utility Functional Process Model

- Our clients are typically organized into three major functional areas: Front, Field, and Back Office functions. Decision Interface's Assessment Model uses this process model to drive the scorecard process.





Operational Assessment Model

- Each step in the Operational Assessment Model is an Assessment Area.

Business Strategies & Policies

- Review business strategies and policies based on corporate vision and mission statement
- Review consistency of understanding across the organization
- Identify risks and barriers to achieve vision

Business Processes

- Define business processes to support the strategies and policies
- Review efficiency and effectiveness of business processes
- Identify risks or gaps

People

- Identify knowledge documentation
- Review retention of key personnel
- Review knowledge management programs (training)
- Identify risks or gaps

Systems

- Review system architecture
- Identify systems that create roadblocks for business
- Develop business case for system enhancements
- Identify risks and gaps



Value of Assessment Scorecard

- **Decision Interface's Assessment Scorecard provides the following value:**
 - Quantitative depiction of strengths and weakness of people, process and technology
 - Risks and barriers to achieving vision and mission
 - Recommendations for improvements of weaknesses



Questions?

Decision Interface
Assessment Scorecard