OPEX IN-A-BOX
Operate with Excellence

Tools to Identify Priorities

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Why identify priorities?

Organizations should understand and focus on what is important, not just what feels urgent

Staff feel less over worked when they know which few activities are priorities

Prioritizing can reduce costs as less-vital activities are cut and duplicated efforts are consolidated

What is the problem?

Multiple 2020 events have unsettled existing plans requiring organizations to reactively scramble to understand what work needs to be done today

- COVID-19
- BLM Movement
- Possible repeal of the Gallagher Amendment
- Economic Recession
- Climate Change
- Election year

Goal: To introduce the DCI community to a handful of tools that can help teams quickly and proactively identify and prioritize their work.

Effective Brainstorming

4 Blocker Chart

Pareto Chart

Why use it?

What is it?

How to use it?

How to interpret it?

How can it help?

Please rate the degree to which you agree or disagree with the following statement: My organization currently has a clear sense of direction and understanding of what the top priorities for the organization are.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

Brainstorming

Produce many ideas or solutions in a short amount of time

Identify and understand main concepts

Create buy-in by ensuring all team members' ideas are considered

What is Good Brainstorming?

Round Table Discussion

- Subject to “influencer bias” or “center of gravity”
- Off topic rabbit holes
- Limited team input
- 1 to 2 ideas generated in 5 minutes for a team of 5

What is Better Brainstorming?

Facilitated Discussion

- Impartial facilitator
- Solicit input from more team members
- Reduce ”influencer bias”
- 3 to 5 ideas generated in 5 minutes for a team of 5

What is Effective Brainstorming?

Exponential Sticky Note

- Eliminate “influencer bias”
- Gather input from all team members
- Exponential idea generation
- 15 to 25 ideas generated in 5 minutes for a team of 5

10 times the number of ideas in the same amount of time

What type of brainstorming has your organization used in the past?

- Good brainstorming (round table)
- Better brainstorming (facilitated discussion)
- Effective brainstorming (exponential sticky note)
- We have never used brainstorming
- We use a different type of brainstorming

1. Create a clear brainstorming problem or opportunity statement

Opportunity: What work processes could be improved upon?

2. Provide prompts to get the team to think about ideas

Opportunity: What work processes could be improved upon?

- Where are we behind our competition?
- Which customers' needs will likely change soon?
- What gaps, risks, or barriers are preventing us from achieving our goals?
- Which processes consistently fall short of desired results?
- Which processes have considerable variation?
- Which processes cause major delays or rework or have significant amounts of waste?
- What concerns have team members raised recently?

3. Clarify what a good idea looks like

Opportunity: What work processes could be improved upon?

Where are we behind our competition?

Which customers' needs will likely change soon?

What gaps, risks, or barriers are preventing us from achieving our goals?

Which processes consistently fall short of desired results?

Which processes have considerable variation?

Which processes cause major delays or rework or have significant amounts of waste?

What concerns have team members raised recently?

Good Idea Statement

Lack of diversified revenue streams could lead to unstable cash flows

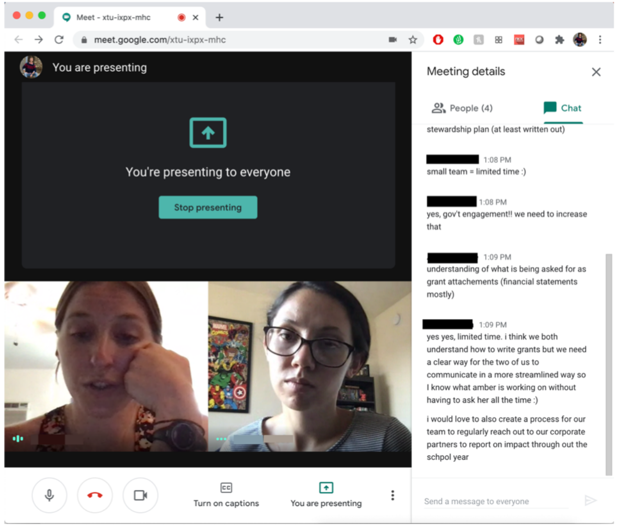
- Case management process is not documented leading to variability in data entry and wasted time to reverify data entry

Bad Idea Statement

- Revenue streams

- Case management process

4. Let everyone privately generate as many ideas as they can in 5 to 10 minutes on sticky notes



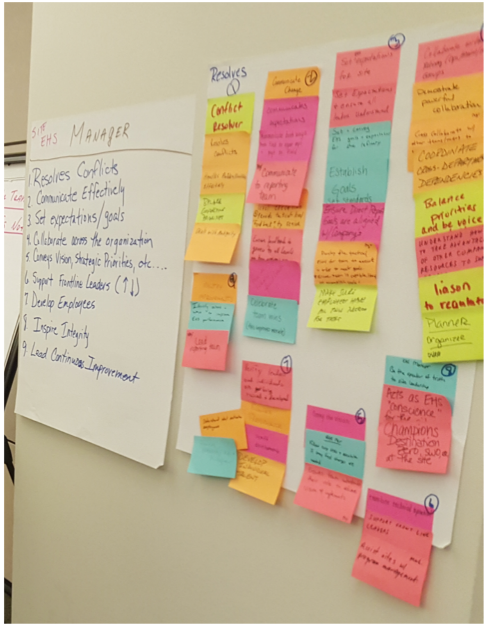
During virtual meetings, teams can utilize the chat feature of a video call and privately message their ideas to a designated facilitator

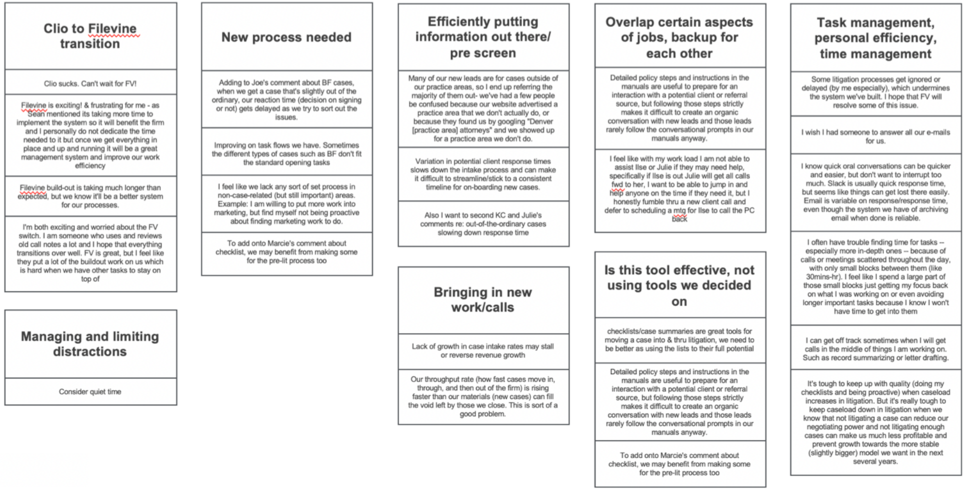
5. Post all the ideas on a wall

Christian	Julie	Ilse	Joe	Marcie
I can get off track sometimes when I will get calls in the middle of things I am working on. Such as record summarizing or letter drafting.	I often have trouble finding time for tasks -- especially more in-depth ones -- because of calls or meetings scattered throughout the day, with only small blocks between them (like 30mins-hr). I feel like I spend a large part of those small blocks just getting my focus back on what I was working on or even avoiding longer important tasks because I know I won't have time to get into them	Improving on task flows we have. Sometimes the different types of cases such as BF don't fit the standard opening tasks	I know quick oral conversations can be quicker and easier, but don't want to interrupt too much. Slack is usually quick response time, but seems like things can get lost there easily. Email is variable on response/response time, even though the system we have of archiving email when done is reliable.	I wish I had someone to answer all our e-mails for us.
Adding to Joe's comment about BF cases, when we get a case that's slightly out of the ordinary, our reaction time (decision on signing or not) gets delayed as we try to sort out the issues.	Consider quiet time	Filevine is exciting! & frustrating for me - as Sean mentioned its taking more time to implement the system so it will benefit the firm and I personally do not dedicate the time needed to it but once we get everything in place and up and running it will be a great management system and improve our work efficiency	It's tough to keep up with quality (doing my checklists and being proactive) when caseload increases in litigation. But it's really tough to keep caseload down in litigation when we know that not litigating a case can reduce our negotiating power and not litigating enough cases can make us much less profitable and prevent growth towards the more stable (slightly bigger) model we want in the next several years.	I feel like we lack any sort of set process in non-case-related (but still important) areas. Example: I am willing to put more work into marketing, but find myself not being proactive about finding marketing work to do.
Lack of growth in case intake rates may stall or reverse revenue growth	Clio sucks. Can't wait for FV!	Also I want to second Joe and Julie's comments re: out-of-the-ordinary cases slowing down response time	To add onto Marcie's comment about checklist, we may benefit from making some for the pre-lit process too	checklists/case summaries are great tools for moving a case into & thru litigation, we need to be better as using the lists to their full potential
Some litigation processes get ignored or delayed (by me especially), which undermines the system we've built. I hope that FV will resolve some of this issue.	Detailed policy steps and instructions in the manuals are useful to prepare for an interaction with a potential client or referral source, but following those steps strictly makes it difficult to create an organic conversation with new leads and those leads rarely follow the conversational prompts in our manuals anyway.	Detailed policy steps and instructions in the manuals are useful to prepare for an interaction with a potential client or referral source, but following those steps strictly makes it difficult to create an organic conversation with new leads and those leads rarely follow the conversational prompts in our manuals anyway.	I'm both exciting and worried about the FV switch. I am someone who uses and reviews old call notes a lot and I hope that everything transitions over well. FV is great, but I feel like they put a lot of the buildout work on us which is hard when we have other tasks to stay on top of	Filevine build-out is taking much longer than expected, but we know it'll be a better system for our processes.
Variation in potential client response times slows down the intake process and can make it difficult to streamline/stick to a consistent timeline for on-boarding new cases.	To add onto Marcie's comment about checklist, we may benefit from making some for the pre-lit process too	I feel like with my work load I am not able to assist Ilse or Julie if they may need help, specifically if Ilse is out Julie will get all calls fwd to her, I want to be able to jump in and help anyone on the time if they need it, but I honestly fumble thru a new client call and defer to scheduling a mtg for Ilse to call the PC back	Our throughput rate (how fast cases move in, through, and then out of the firm) is rising faster than our materials (new cases) can fill the void left by those we close. This is sort of a good problem.	Many of our new leads are for cases outside of our practice areas, so I end up referring the majority of them out- we've had a few people be confused because our website advertised a practice area that we don't actually do, or because they found us by googling "Denver [practice area] attorneys" and we showed up for a practice area we don't do.

During virtual meetings, the designated facilitator can visualize ideas using "virtual sticky notes" (text boxes) by copying ideas into PowerPoint, Excel, etc.

6. Affinitize ideas to identify main concepts





Clio to Filevine transition

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Managing and limiting distractions

Consider quiet time

New process needed

Adding to Joe's comment about BF cases, when we get a case that's slightly out of the ordinary, our reaction time (decision on signing or not) gets delayed as we try to sort out the issues.

Improving on task flows we have. Sometimes the different types of cases such as BF don't fit the standard opening tasks

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Efficiently putting information out there/ pre screen

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Also I want to second KC and Julie's comments re: out-of-the-ordinary cases slowing down response time

Bringing in new work/calls

Lack of growth in case intake rates may stall or reverse revenue growth

Our throughput rate (how fast cases move in, through, and then out of the firm) is rising faster than our materials (new cases) can fill the void left by those we close. This is sort of a good problem.

Overlap certain aspects of jobs, backup for each other

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Is this tool effective, not using tools we decided on

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Task management, personal efficiency, time management

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Organizing ideas into logical categories or themes based on the natural relationships between the ideas can help a team understand the main concepts generated during brainstorming sessions. Remember that if an idea does not fit into a category, it may be worth creating a new category.

Brainstorming Outcomes

Produced many ideas or solutions in a short amount of time

Identified and understand main concepts

Created buy-in by ensuring all team members' ideas are considered

But how does a team identify which ideas are their top priorities or understand the potential benefits for a group of ideas?

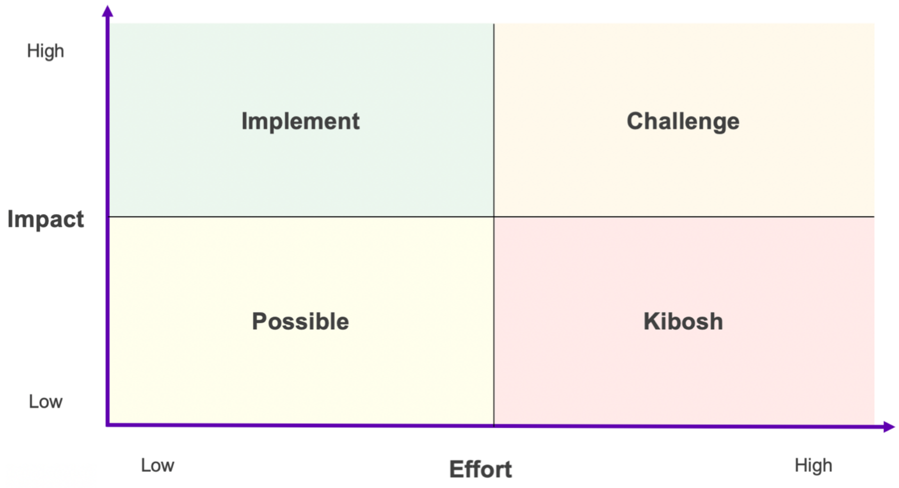
4 Blocker

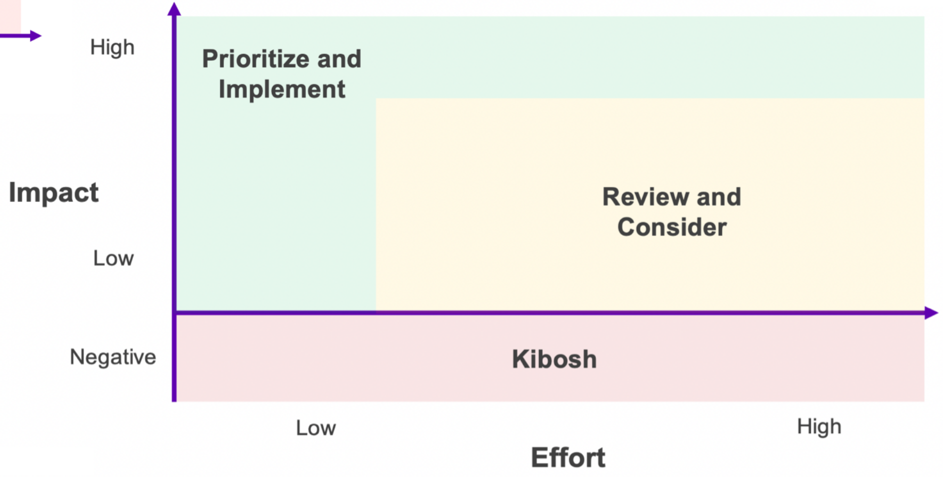
Map ideas based on their relative effort to implement and impact to an organization

Identify high impact, low effort quick wins

Visualize all opportunities against one another for selecting priorities

What is a 4 Blocker?

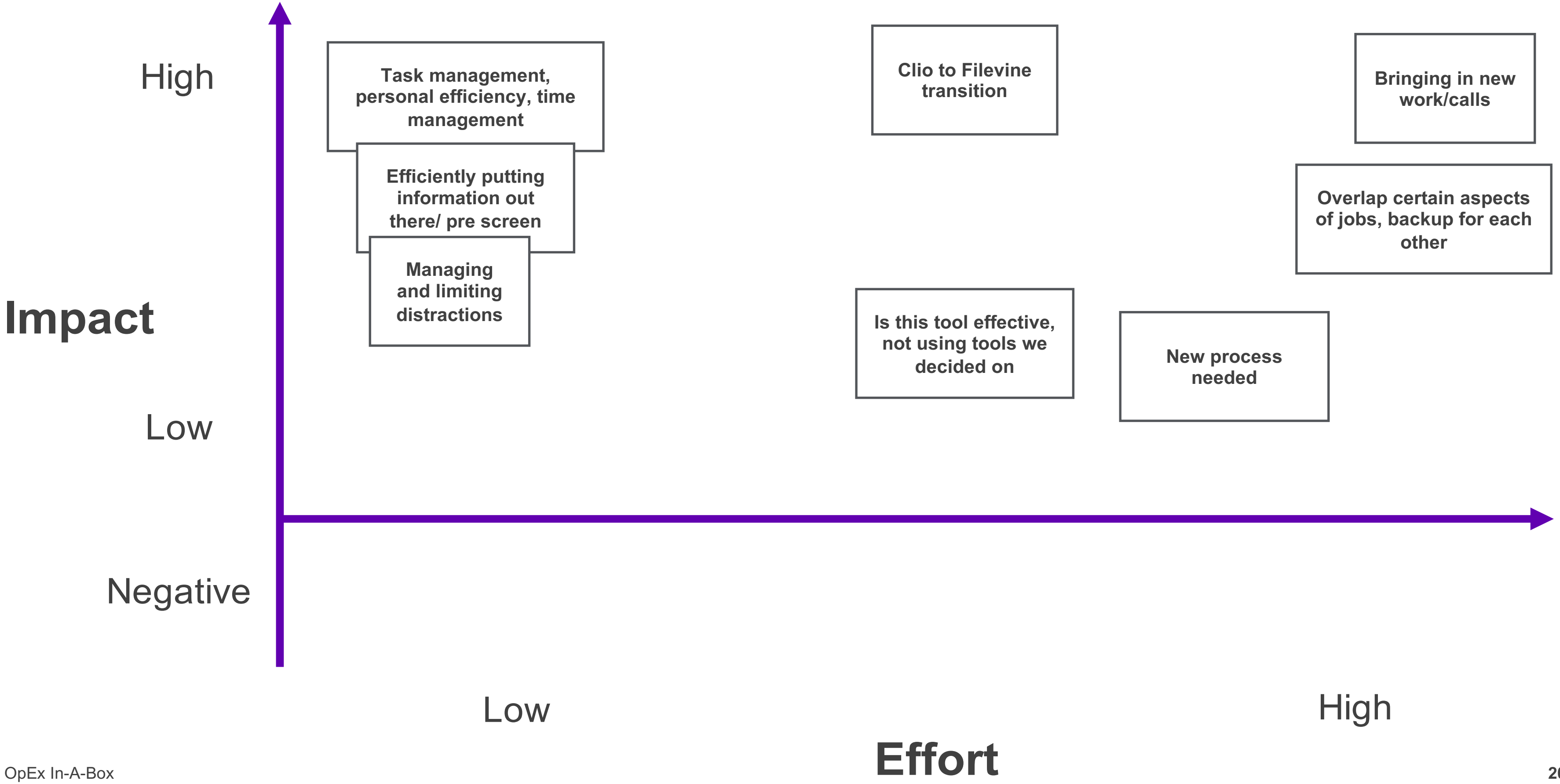




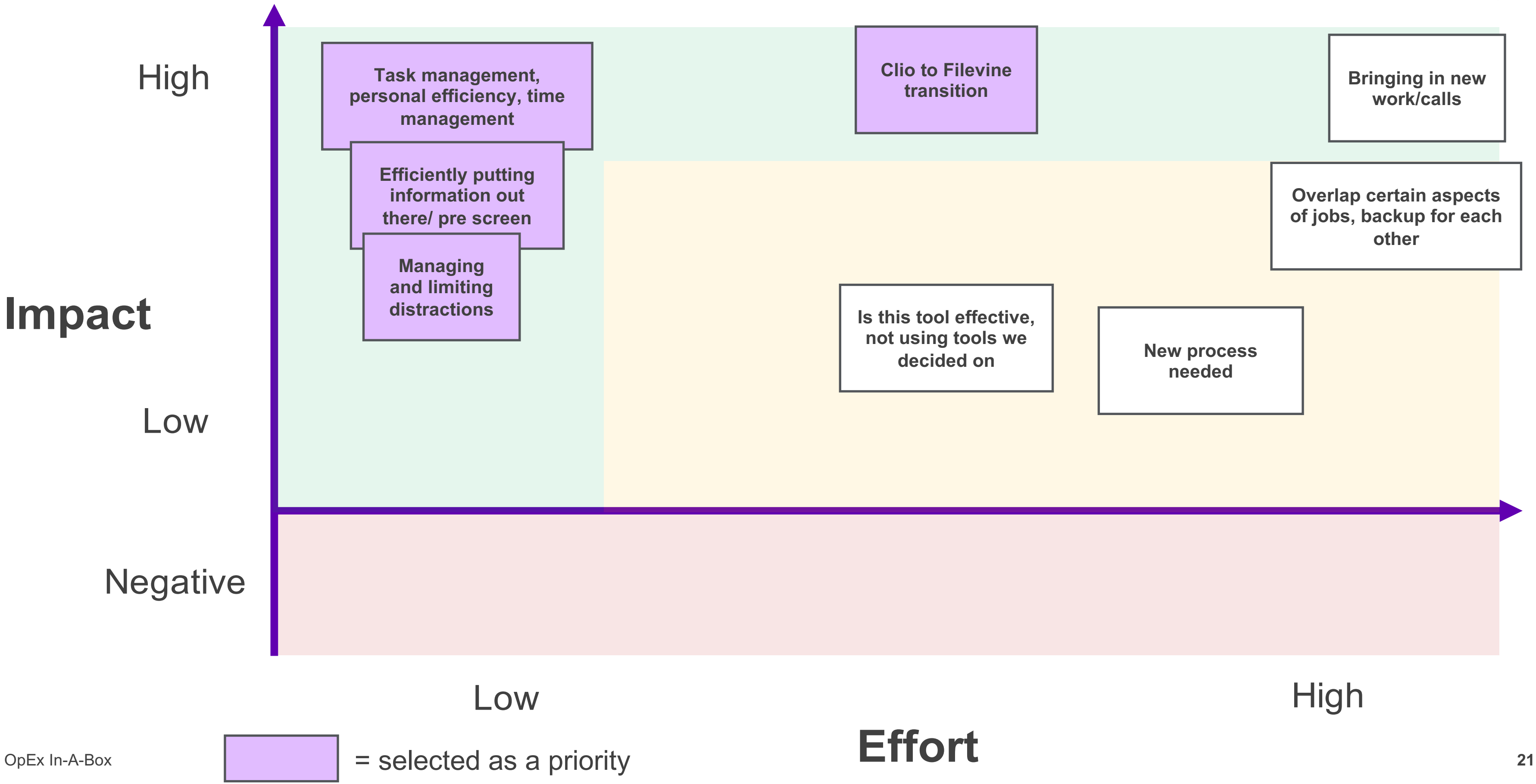
How to use a 4 Blocker

PowerPoint Demo

1. Place each main concept on the 4 Blocker one at a time and relative to one another



2. Determine which concepts should be selected as a priority



4 Blocker Outcomes

Mapped ideas based on their relative effort to implement and impact to an organization

Identified high impact, low effort quick wins

Visualized all opportunities against one another for selecting priorities

But what if a team is still unable clearly identify their top priorities using a 4 Blocker?

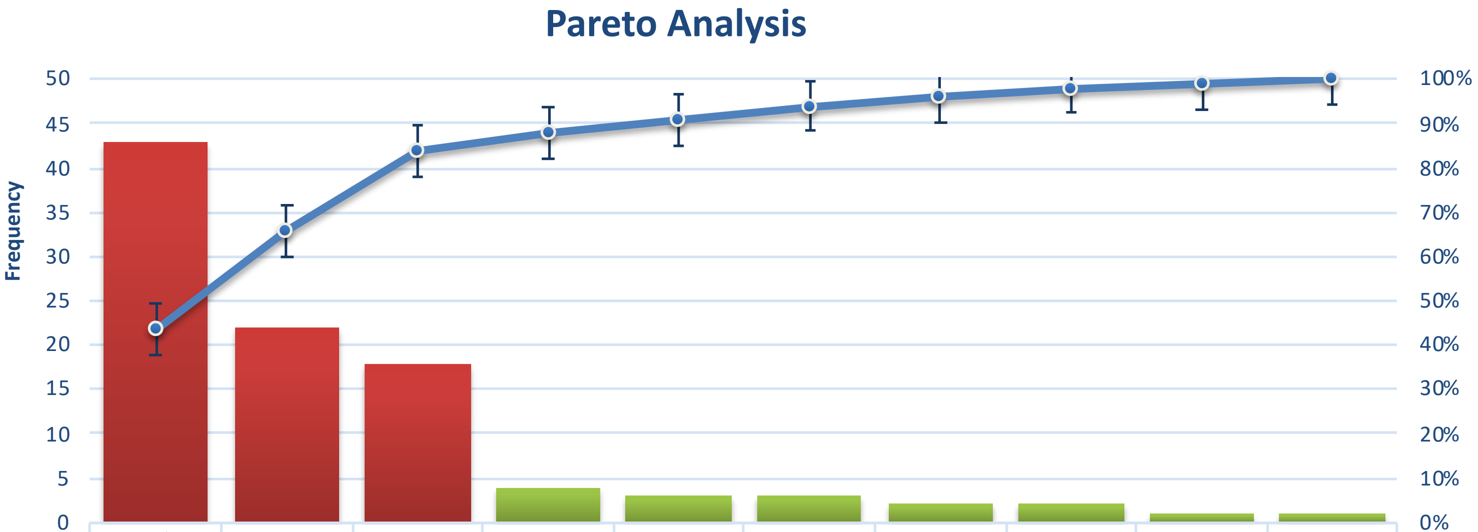
Pareto Chart

Determine which ideas contribute most to a problem (e.g., time, cost, count, etc.) and should be prioritized

80/20 rule

Focus efforts where you will have the largest impact

What is a Pareto?

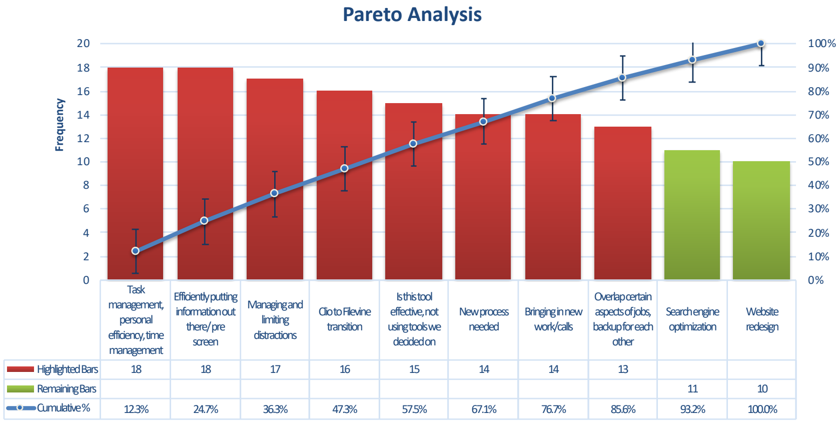


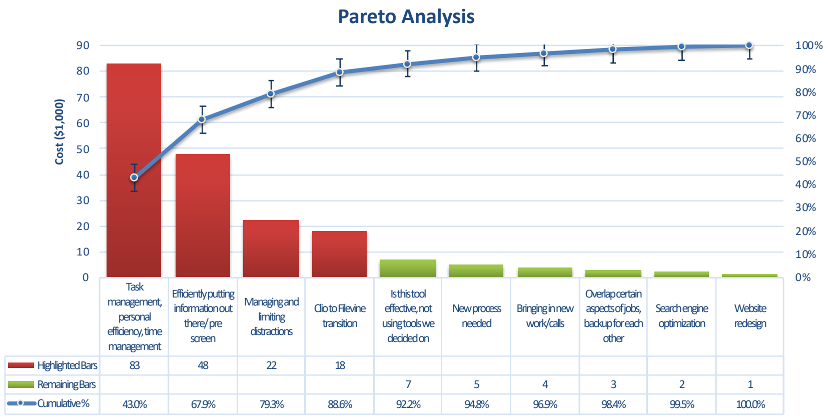
	Task management, personal efficiency, time management	Efficiently putting information out there/ pre screen	Managing and limiting distractions	Clio to Filevine transition	Is this tool effective, not using tools we decided on	New process needed	Bringing in new work/calls	Overlap certain aspects of jobs, backup for each other	Search engine optimization	Website redesign
Highlighted Bars	43	22	18							
Remaining Bars				4	3	3	2	2	1	1
Cumulative %	43.4%	65.7%	83.8%	87.9%	90.9%	93.9%	96.0%	98.0%	99.0%	100.0%

How to use a Pareto

Excel Demo

Interpreting the data





No Pareto effect

- Use impact (time, cost, etc.) instead of count/frequency
- Revise causes/categories
- Consider what could impact all causes

Clear Pareto effect

- Just a few causes account for most of the outcome or problem
- Focus improvement efforts on those causes

Pareto Chart Outcomes

Determined which ideas contribute most to a problem (e.g., time, cost, count, etc.) and should be prioritized

80/20 rule

Focused efforts where you will have the largest impact

Next steps

Why?
What?
How?

Tools to Identify Priorities

- Effective Brainstorming
- 4 Blocker
- Pareto Chart

Utilize these tools to identify ideas and prioritize work and opportunities within your organization

What is the likelihood that your organization will make use of one of these tools (Effective Brainstorming, 4 Blocker Charts, and Pareto Charts) in the future?

- Very likely
- Likely
- Neutral
- Unlikely
- Very unlikely

Summary of New Skills

Effective Brainstorming: Setting aside 5 to 10 minutes and letting everyone document their ideas on a sticky note can lead to exponential idea generation compared to round table discussions. Sticky notes also allow the voice of everyone in the room to be heard and prevents an influential person from silencing the ideas of others. During a virtual meeting, teams can utilize the chat feature of a video call and visualize ideas using “virtual sticky notes” (text boxes) in PowerPoint.

Affinity Diagram: Organizing ideas into logical categories based on the natural relationships between the ideas can help a team understand the main concepts generated during brainstorming sessions. Remember that if an idea does not fit into a category, it may be worth creating a new category.

4 Blocker: It may be difficult to identify the top priorities or understand the potential benefits a group of ideas might have. Mapping ideas based on their relative effort to implement and impact to the organization allows teams to pick out quick wins (high impact, low effort) projects as well as visualize all other opportunities against one another for selecting priorities.

Pareto: If picking a top priority using a 4 Blocker is not straightforward, consider using a Pareto. A Pareto is a specialized bar chart that can help identify the “vital few” opportunities or problems. The frequency or impact (time, cost, etc.) can be used to evaluate each idea or category. If using impact the comparison is straightforward. If using count, surveys or impromptu voting can be used to determine the priorities. In a team setting, voting can be performed by having each team member assign a 1 to 10 score for each idea or category, writing their score next to ideas on a white board.

About OpEx In-A-Box

OpEx In-A-Box provides Operational Excellence consulting and tools for nonprofits and businesses. Operational Excellence is the ability to effectively, efficiently, and sustainably deliver a mission or objective. We help organizations achieve Excellence by ensuring they proactively **manage risks** before issues can jeopardize the organization, eliminate inefficiencies and simplify processes to save costs through **improvement and innovation**, and develop healthy **organizational cultures** that retain talent and unlock the potential and skills of people. Our hope is that Operational Excellence becomes a normal practice for nonprofits that want to maximize their social impact and businesses that want to excel in their sector.

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