

Assignment 4: Research Background

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Improving is a full-service IT provider that offers project services, recruiting, consulting, and training. Numerous clients from all around the world have used their creative ideas and procedures to attain both their tactical and long-term commercial goals. As a result, Improving's 1,000 workers have gathered in-depth management and technology experts in various sectors, including financial services, energy, travel, retail, government, and more. Their corporate culture supports both inspiration and incentive for extraordinary accomplishments. Through the foundation of trust, Improving continuously aspires to live out their values of Excellence, Dedication, and Involvement. Our objective for this project is to explore customer success metrics, define new goals for the Balanced Scorecard, create new metrics for company success, and provide quality recommendations for the BSC at Improving.

Method 1: Gap Analysis

The first method that we chose to pursue is a Gap Analysis. We thought that it seemed like a great starting point to identify pain points throughout Improving's BSC and the processes that go into them. We also concluded that the Gap Analysis would be pivotal to aligning our inputs towards pursuing better recommendations. At our project kickoff meeting, we were informed by our stakeholders at Improving that they were open to us discovering a solution to any of their internal problems that pertain to the BSC. This left the "end goal" up to interpretation, which is a great pivot point to instigate a Gap Analysis to find multiple solutions from a general outline of all the errors/rooms for improvement.

The initial key pain points that we explored were provided by our stakeholders. Since Improving emphasizes a culture/customer-based company system, they recommended a change for their account review process (which is with a client every 90 days). They expressed pain points within their consultant reviews, primarily through feedback. Improving stated that their leading indicators do not correlate with the effects of lagging measures. This communicated that some measured values are produced in the BSC that do not reflect ongoing business practices. Other pain points mentioned included a lack of universal communicative transparency throughout different layers of employees, gaps between measured values on the BSC, and a pencil-whip effect occasionally experienced between Improving and its clients.

We continued to break down our Gap Analysis research into leading questions that addressed potential successes and gaps in Improving's environment. Our primary gap pertained to a lack of data visualization for leading indicators. This would potentially result in missing opportunities to gain a competitive edge in their internal business processes. Looking deeper into this gap, we identified that a critical leading indicator included inconsistencies in data input and measurements. Principal indicators that will identify that the process is completed incorrectly include a lack of aligned goals throughout all measures, the same or decreased number of errors in the BSC, static company progression towards targeted successes, and a lack of solid connectivity of certain factors between C-Suite perspectives. Principal indicators that will identify that the process is completed correctly include fewer errors on the BSC, increased

efficiency when compiling the BSC, completion of target measures for each section, and a more accurate level of measure with a decrease in margin of error.

Our preference would be to implement a sustainable and automated BSC design. This design would allow for Improving to easily measure success within each subset of the BSC and grow as a company. We think that the bridge can occur when developing new processes for measuring each section of the BSC (i.e., new software). This would promote an automatic inflow of data into the BSC, negating the demand for unnecessary human input. The two main types of gaps that we identified include Environmental and Communication gaps. We reasoned that it would be a 70/30 split, with Environmental gaps being the primary hindrance. Our logic was based on the preliminary information that we received from Improving's feedback.

Methods 2 & 3: Thematic Networks/Content Analysis

After identifying the gaps from the analysis above, we decided to pursue the development of a Thematic Network as it would allow us to organize information from the BSC into overarching categories. We can originally categorize these sections within Improving's Balanced Scored Card into four Global Themes; Culture, Services, Operations, and Financial. From this, we developed organizing themes and conducted a Content Analysis to identify consistencies among these themes.

Perspective 1: Culture (Global Theme)

The first Global Theme we investigated was Culture. Within this section, we were able to develop four organizing themes: Engagement, Involvement, Professional Groups, and Speaking Engagement. Within the Engagement organizing theme, some of the basic themes we discovered include, but are not limited to, the number of employees, number of events, salaried employee attendance, hourly employee attendance, and speaking engagement. When identifying these basic themes, we performed a Content Analysis to identify, through coding, that each basic theme was pertaining to the level of engagement of employees within Improving. All of which directly influence the quality of the culture within the company.

Secondly, we identified Involvement as our next Organizing Theme. One of the key components of the culture within Improving is the amount of involvement by employees. The current BSC used by Improving has aggregated data that pertains to the amount employees who are actively involved with the regular available engagement activities. We conducted a Content Analysis to utilize this involvement data to develop basic themes for this Thematic Network. After performing a Content Analysis on these basic themes (e.g., current year employee involvement levels, target involvement, and last year's involvement), we identified consistencies that each data point was related directly to employee involvement.

Professional Groups is the third Organizing Theme we identified through this Thematic Network Design Research activity. Not only is employee involvement and engagement a priority for Improving, but more specifically, involvement within Professional Groups is of significant importance to the C-Suite within the company. To organize Basic Themes relating to

Professional Groups, we utilized a Content Analysis to code data points based on similarities. Some of the Basic Themes we coded under this category include metrics of total group attendance, first-time group attendance, and the data recorded from the previous years.

Perspective 2: Services (Global Theme)

The second Global Theme we identified during this Thematic Network activity was Services. However, we needed to dive deeper into Improving's BSC to organize the data into Organizing Themes/Categories. To accomplish this, we utilized the Content Analysis strategy to code and cluster data based on the significance to Services. The two overarching Organizing Themes identified are Reviews and Training. Within Reviews, we were able to code over 15 data points and develop them into Basic Themes pertaining to the Organizing Theme of Reviews. Some of these Basic Themes include the average review score for employees, monthly average trust scores, and YTD overall scores.

Moreover, the Thematic Network also helped us to identify Training as an Organizing Theme that seemed to be crucial to the success of the services offered within Improving. Within the BSC used by the company, they regularly track data pertaining to the number of employees who have attended training events, how many events each employee attended, what was learned, and so on and so forth. Coding each one of these metrics using the Content Analysis helped the team to validate that each of these points was significant enough to contribute to the Organizing and Global themes within the Thematic Network, resulting in their new contribution as Basic Themes.

Perspective 3: Operations (Global Theme)

After reviewing the information within Improving's BSC, a lot of the data was found pertaining to Global Themes within the company. In order to develop Organizing Themes, we first conducted a Content Analysis to identify consistencies among the data that could lead to organizational categories being developed. We went through all the information included within Improving's BSC and coded the data that was similar. Once this was completed and the codes were grouped accordingly, our team was able to generally categorize the data presented into 8 Organizing Themes: Employees, Recruiting, Departures, Technical Attrition, Technical Headcounts, New Logos, New Anchors, and Top Clients. Each one of these Organizing Themes is a crucial component to the success of the company. For example, within the Employees Organizing Theme, some of the data that was coded to this section includes the metrics for company consultants, the number of employees who are salaried, the number of employees who are paid hourly, and all information pertaining to employees. We carried this coding strategy on throughout the entirety of the data, which allowed us to develop the other 7 Organizing Themes mentioned above.

Perspective 4: Financial (Global Theme)

The final, and arguably most important, Global Theme we identified through this Thematic Network analysis was Financial. Improving must prioritize being financially stable and sustainable in order to ensure the business has a prosperous future moving forward. After performing a Content Analysis on all

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of Improving’s recorded financial data, we were able to code our findings into three primary Organizing Themes: Sales, Revenue, and Profit. Improving records data from the past years and comparing it to the current financial data. For the Sales theme, the coded data includes, but is not limited to, YTD Sales, Daily Sales, and Monthly Sales. In terms of the categories of Revenue and Profit, the basic themes we included were Daily Revenue, EBITDA, and Gross Margin. There were several variations of each of these data sets that allowed us to code them in relation to either Revenue or Profit.

Method 4: Elito Method

The Elito Method is a design research method used to develop solid design arguments grounded in research observations and anchored by business directives. This method would allow our team to synthesize and analyze Improving’s BSC to assist in the articulation of the data, enabling our team to transform our observations and analysis into insights for further investigation. The Elito method is divided into five sections designed to create a logic line or a design argument. The five sections include Observations, Judgement, Value, Concept and Sketches, and a Key metaphor. During the Observations stage, we noticed that their quantitative data and graphic visuals were presented poorly in Excel. Moreover, Improving also mentioned that they had previous issues with human errors relating to the manual input of data. The probability of human error occurring when manipulating the BSC data increases as the organizational quality of the system decreases. Moving onto the Judgement section, reducing the amount of clutter within each section of the BSC is vastly important as this would allow for a seamless and sustainable model for tracking success at Improving, as well as create a space that is resistant to human error. When it comes to the Value added by making improvements, developing a new data visualization model will add immense value to the C-Suite within Improving as the process of understanding the information will be much more efficient. Moreover, automating the data input process will assist in the reduction of human error and allow for Improving to ensure they are receiving the most quality insights. The fourth step within the Elito Method is ideating solution Concepts and Sketches. Implementing software solutions such as Notion, Sisense, and SpiderStrategies will allow Improving to redesign their current BSC into new, clean data management software. Key metaphor: Trust Changes Everything.

Personal Reflection

After conducting a Gap Analysis, Thematic Network, Content Analysis, and the Elito Method, I feel that my team, as well as myself, has now developed a more solidified understanding of the functionality of Improving's Balanced Scorecard. Moreover, these analyses have opened my eyes to potential gaps that we could pursue in the future. I really enjoyed conducting the Gap Analysis as it helped to highlight issues within the communication process surrounding the BSC, as well as the corporate environment within Improving. Moreover, by using this method to identify these gaps, this opened doors to potential opportunities that my team could improve upon. In addition, the Thematic Network and Content Analysis were also

two very valuable Design Research Strategies for helping my team identify connections between Basic and Global Themes. Originally, I was confused as to how each data point within Improving's BSC were related to each other. Performing both analyses assisted me in understanding this connection. Lastly, the Elito Method helped my team to synthesize our observations and transform them into insights. I think that this method can be used on multiple occasions throughout this project as it is just a great universal method for turning findings into insights and next steps. After conducting all these research methods, I feel that I am more comfortable with the information within Improving's BSC. I hope to not only be able to utilize these methods during future steps of this project, but also leverage our findings that we received and utilize them as guiding steppingstones to point us in the right direction.

I believe that my team and I have a more complete understanding of how Improving's Balanced Scorecard functions now that we have completed a Gap Analysis, Thematic Network, Content Analysis, and Elito Method. These analyses have also made me aware of potential research gaps that we might explore in the future. I really enjoyed conducting the gap analysis because it helped to bring to light problems with the BSC's communication process and the corporate culture of Improving. Additionally, by employing this technique to pinpoint these weaknesses, doors were opened to potential improvements that my team could make. As additional tools for design research, the thematic network and content analysis assisted my team in finding connections between

Throughout the research background, I believe that my team and I have a more complete comprehension of the foundations of Improving's Balanced Scorecard. We gained this understanding