

Implementing Business Improvement

by

“Managing
Operational
Performance”

USER TRAINING

Skip the Introduction

"A CEO's nirvana"

(‘Nirvana’ - any place of complete bliss and delight and peace)

- ❖ To constantly increase the \$ VALUE of the business
..... for future sale, capital raising, or franchising
- ❖ To continually improve business efficiency and profits
..... without relying on CEO-initiated changes
- ❖ To have control over staff execution of all plans
..... with openness and transparency and less personal
CEO involvement
- ❖ To instill a culture of continuous improvement in all staff
..... for the CEO to have confidence that operations will
run properly when CEO is absent from the business

So business any will benefit by :

- ❖ **An easy way for the CEO to;**
“**work ON the business as well as IN the business”**
(gives the CEO visibility without intrusion).
- ❖ **A transparent and consistent view of the business**
(that gives all staff a clear understanding of the business).
- ❖ **An integrated business improvement process**
(that enables all staff to actively participate and constantly initiate improvements in the business).
- ❖ **The right systems tools and knowledge for everyone**
(to improve everyone’s personal performance).
- ❖ **All this at a low cost**
(that any small-to-medium business can easily afford).

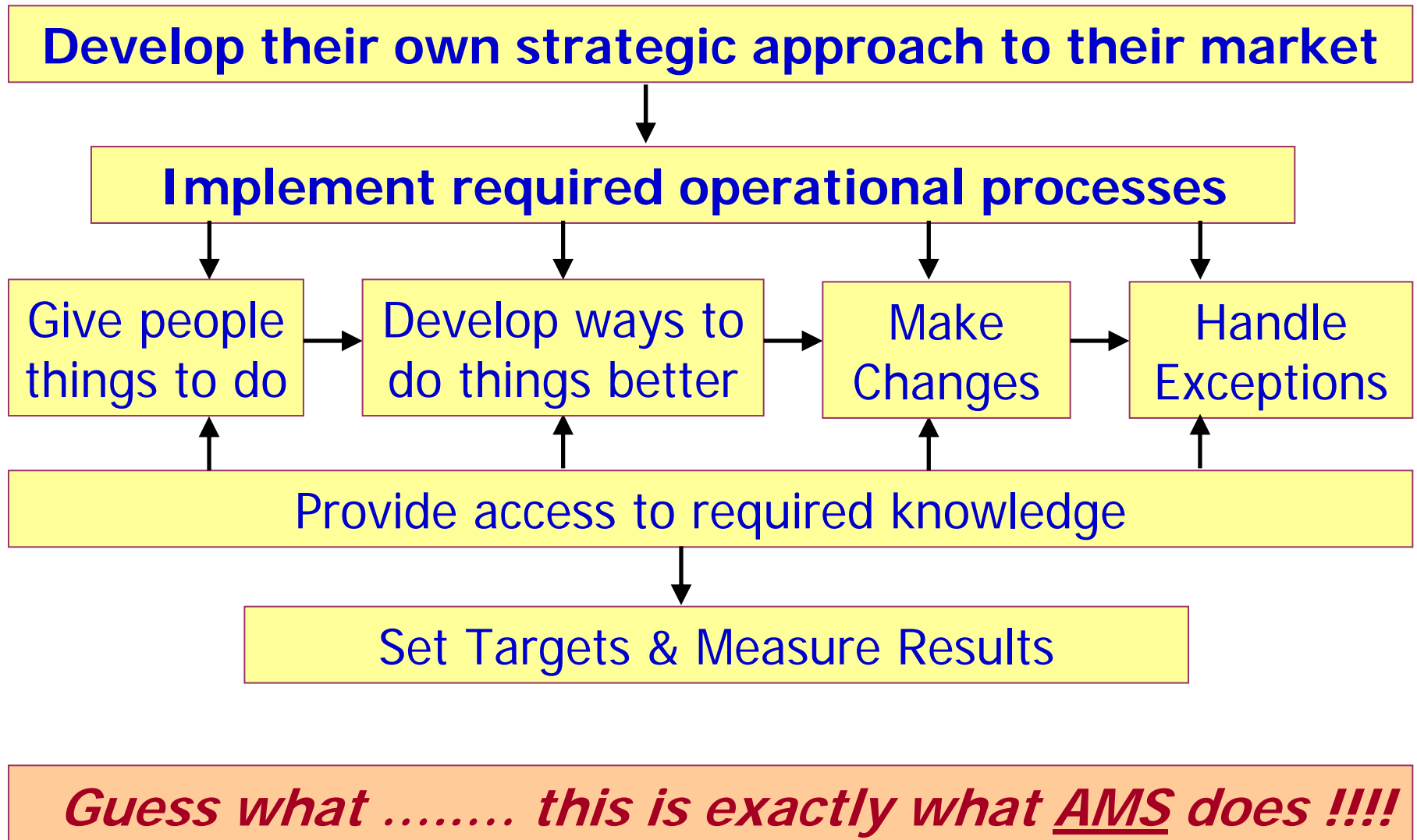
..... i.e. **A “BUSINESS IMPROVEMENT SYSTEM”**



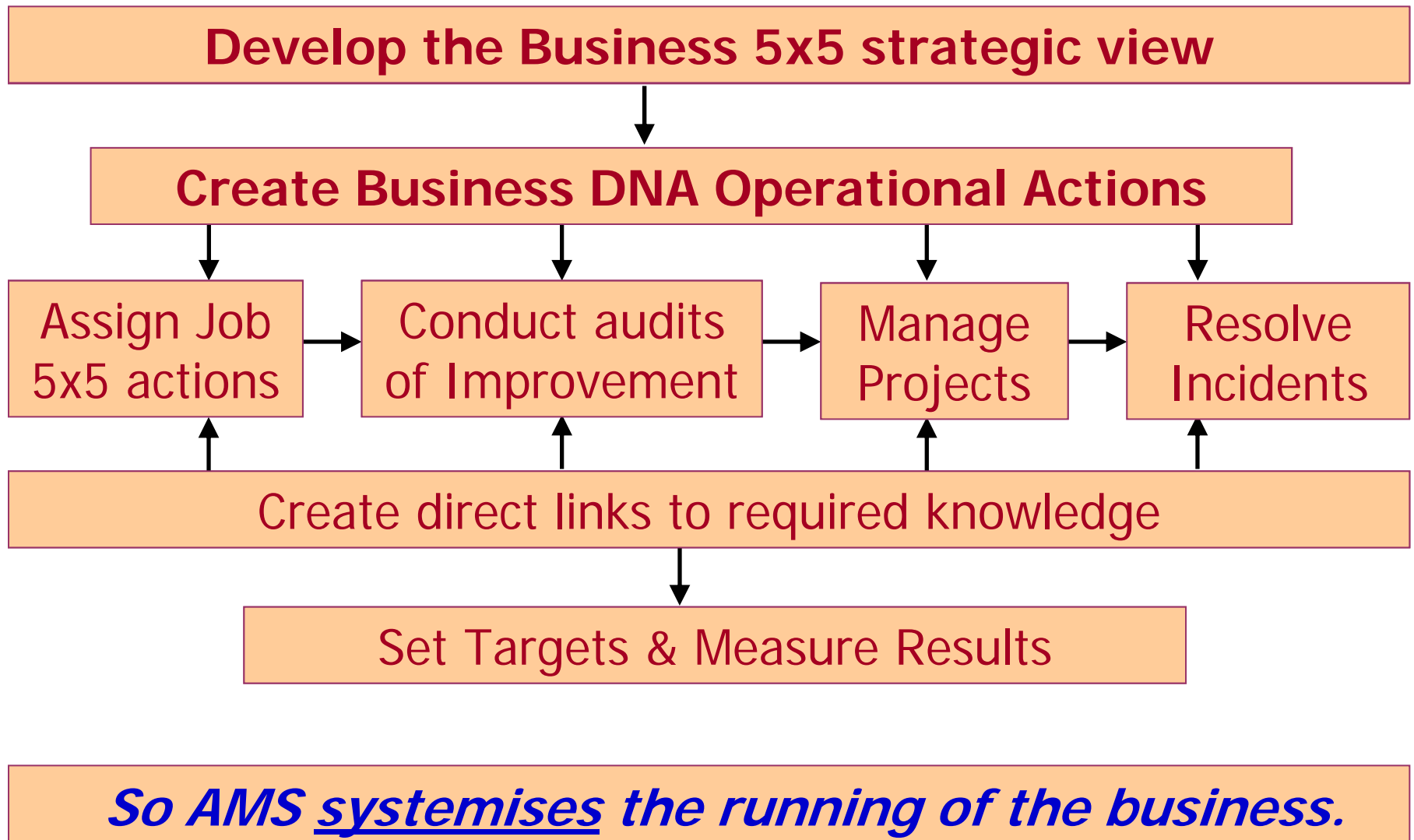
To achieve this business improvement we focus on “action management”

1. **Firstly, to create a new and simple “view of the business” based on the most important operational actions of the business so that all staff understands how the business runs.**
2. **Secondly, to link everyone’s job directly to these operational actions so that everything that people “do”, contributes directly to the value of the business**
3. **Thirdly, to give all staff accountability for real business actions and give all staff the tools and knowledge to immediately start “Doing The Right Things”**
4. **Finally, to give all staff a way to really make improvements in all the actions of both the business and their jobs .**

All businesses “operate” like this



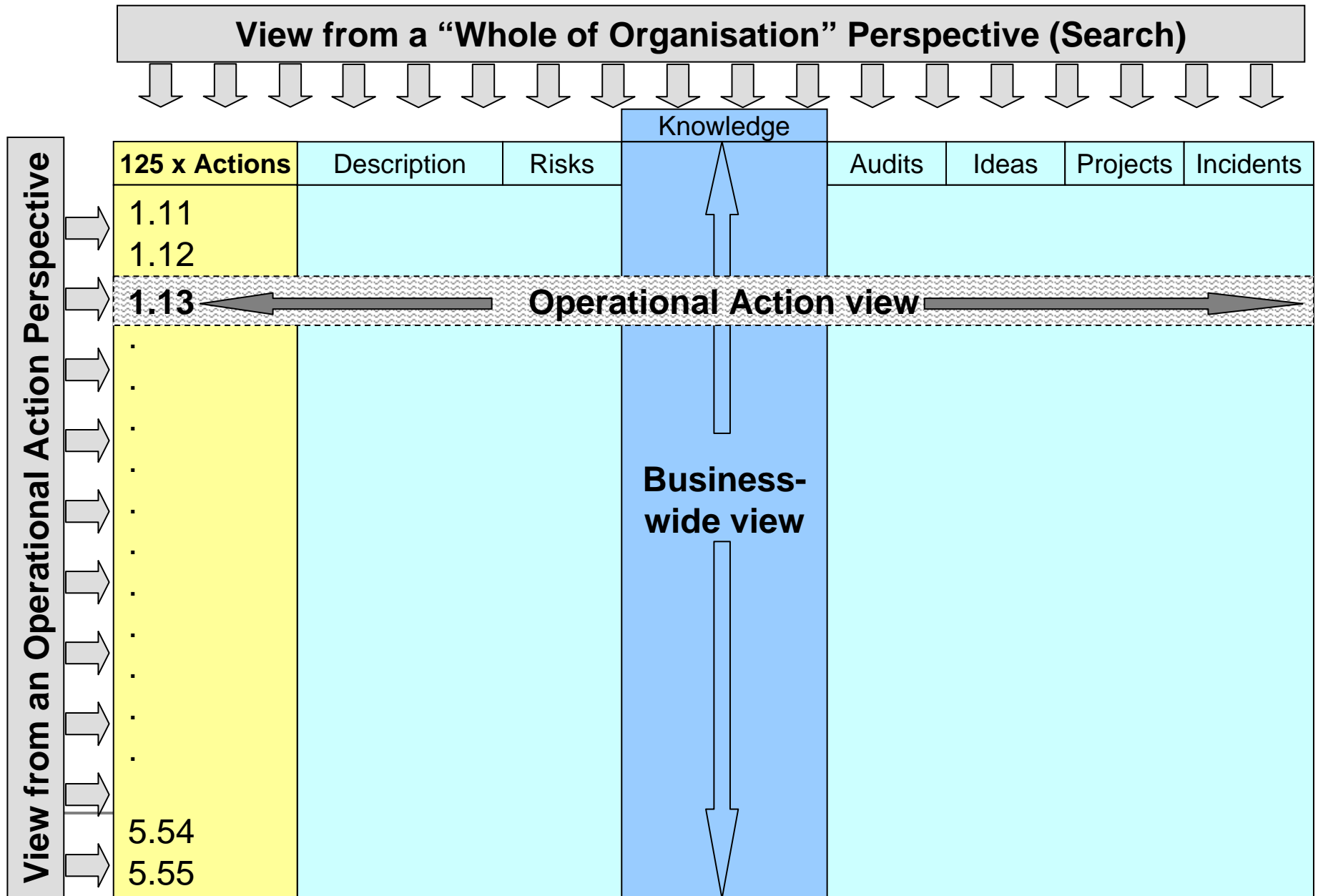
The AMS Process simply overlays a business to “Improve Operational Performance”



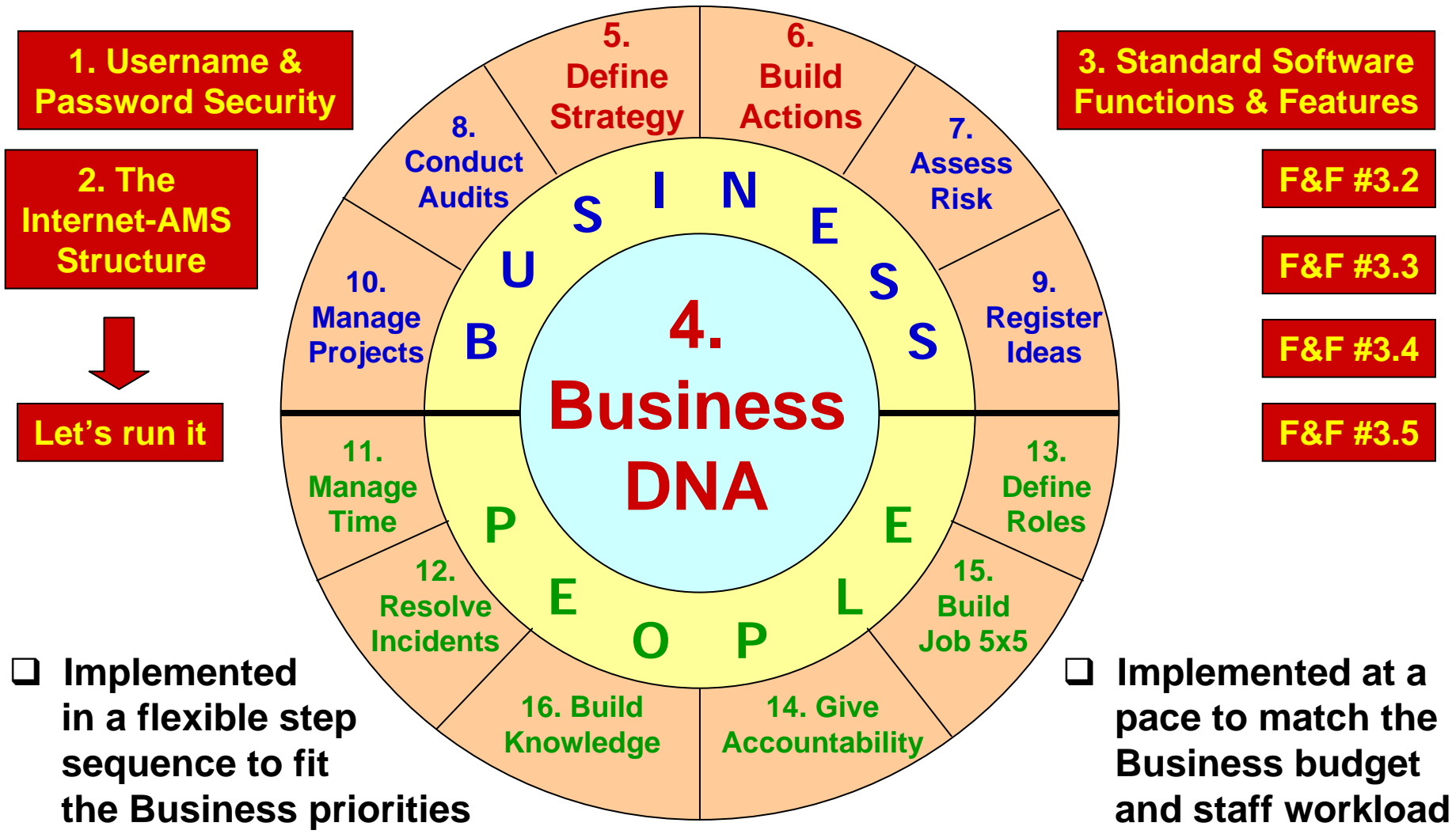
The Action Management System (AMS) therefore contains the THREE key components of “systemisation”:

- (1) A business improvement PROCESS**
(the method).
- (2) A business management SYSTEM**
(the software).
- (3) An operational KNOWLEDGEBASE**
(the information).

"Horizontal & Vertical" View of AMS



The Online AMS Systems Elements



1. Username & Password Security

- ❖ **Every user has a unique Username**
 - ❖ e.g. < initials.businessnumber > so Tom Smith would be TS.3 (for duplicate initials use TS*1.3 and TS*2.3)
- ❖ **Every change or transaction is captured on a systems log that records the Username that makes every update, and the before and after data.**
- ❖ **Every user must immediately change their password after first log-on**
 - ❖ Administrator can re-set passwords if forgotten by User
 - ❖ **To change password go: Main Menu/+AMS/Involve Staff/Change Password**
- ❖ **At “sign-on” if the number of licensed concurrent users is exceeded then the message “Access Denied” will display**
 - ❖ Please try again in a few minutes and refer occurrences to the Administrator
- ❖ **A User Session will be suspended if the user is inactive for 10 minutes**
 - ❖ It is not necessary to sign-on again, simply click on any Main Menu item.
- ❖ **Occasionally a pop-up “CSP” log-out error message may appear**
 - ❖ Simply click the OK box and refresh the page by clicking on any menu item.

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2. The Internet-AMS Display Layout

The screenshot shows the Internet-AMS web application interface. The browser window title is "AMS Demonstration - Richard Burley - 04/08/2006". The address bar shows "http://www2.mycosystems.com.au/csp/amstest/www.cls". The interface includes a navigation menu on the left, a main content area with a table of reminders, and a footer with a "Return to the AMS Wheel" button.

Browser Menu: Located at the top of the browser window, including File, Edit, View, Favorites, Tools, and Help.

Page Menu: Located at the top of the application page, including Table of Contents and AMS.

Page Functions: Located below the page menu, including Administration, Direct the Business, Check Performance, Improve Performance, Involve Staff, Enter New Items, and Search All Business.

Main Menu: Located on the left side of the application, including List DNA Actions, List Knowledge, List Risks, List Audits, List Ideas, List Projects, List Incidents, List Roles, List Employees, List Job 5*5, Action Reminders, and AMS Implementation Tool.

Application Display: The main content area showing the "Action Reminders" page for "Richard Burley". It includes a reminder type selector (Overtime Date Reminder, All Date Reminder, Future Date Reminder, Due Reminders Of All Persons) and a table of reminders.

Reminder	Form	Reference	Delete	From / Date
01/07/2006	Initiate Incident / 9/9/9/1	Incident Report	<input type="checkbox"/>	RB.1 / 01/06/2006 17:07:41
09/07/2006	Improvement Project / BIP01/6	Project Actions	<input type="checkbox"/>	RB.1 / 09/06/2006 13:51:40
09/07/2006	Job 5*5 (Level 2 Act / CL.1/1/1	Job Action Review for CL.1	<input type="checkbox"/>	RB.1 / 09/06/2006 14:16:34
19/07/2006	Job 5*5 (Level 2 Act / RB.1/1/1	Job Action Review	<input type="checkbox"/>	RB.1 / 06/07/2006 15:24:32
31/07/2006	Scheduled Report Rem / 27	Your Report Overdue Actions - All Projects is now ready.	<input type="checkbox"/>	RB.1 / 31/07/2006 07:50:01
01/08/2006	Scheduled Report Rem / 30	Your Report Incidents Overdue Report is now ready.	<input type="checkbox"/>	RB.1 / 01/08/2006 08:00:06
01/08/2006	Scheduled Report Rem / 32	Your Report Strategy Report is now ready.	<input type="checkbox"/>	RB.1 / 01/08/2006 18:45:05

[RB.1, 04/08/2006, 18:16:05][Help@TheManagementPractice.com]

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3. Standard Software Functions & and Features #1

- ❖ **Within the AMS there are many standard user operations built into the software. Following is a brief overview of the most important of these functions & features .**

Function/Feature

- ❖ **How to Use AMS:**
An introductory overview tour through the AMS process.
- ❖ **Online HELP:**
In the Page Menu section there is a [?]. This provides explanation and assistance for the whole page.
- ❖ **Field-level HELP:**
If you click into any field in a form page and then press F1 then this will pop-up a description of what that field represents and the date that this field was last changed.

TRY IT

- ❖ **Main Menu/ +AMS/AMS Implementation Tour**
> First click on Business Introduction
..... then sequentially go through the steps
..... Click on "Close Window" when finished.
- ❖ **Don't try Online HELP or Field-level HELP yet, you can try these at anytime later**
- ❖ **EMAIL HELP:**
At the bottom of every Application Page there is an email link. If any user has a problem with the Navigator system they simply click on this link and type the details of their issue at the bottom (after the auto-inserted text) and send.

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3. Standard Software Functions & and Features #2

- ❖ Following is a brief overview of some more of these functions & features .

Function/Feature

- ❖ **Within the Application Display Frame there are five different “display modes”**
 - (1) **Directory (Search) Page** e.g. List Incidents
 - (2) **Form Page** e.g. New Incident
 - (3) **Selection Page** e.g. See Accountability
 - (4) **Graphic Page** e.g. View Business DNA
 - (5) **Report Page** e.g. DNA Risk Balance
- ❖ **Search All Business Pages:**
 - > These pages are “directory” pages to AMS data. Within the Directory Header line there are up and down black arrow heads. Clicking on these will sort the directory listed data in either ascending or descending order.
 - > The number of items displayed is shown in the “Number” box. If you need to see a greater number of items then simply key-in the number of items that you wish to display and press the “Enter” key

Function/Feature

- ❖ **Search All Business Pages (cont.)**
 - > You can search by key-word to narrow the Directory List to only those items that include the key-word. Click in the “Search within” box and enter an *(asterisk) followed immediately by the keyword (no space between).
 - > Items can be listed in Ascending or Descending order by clicking on the appropriate Radio Button and pressing the “Enter” Key.
- ❖ **All items listed on a “Search Page” are direct links to the actual item displayed.**
 - > Clicking on any item will open the item details.
- ❖ **Export to Excel from any Search Page:**
 - > Right-click on any Directory Header line and select “Export to Microsoft Excel”.
- ❖ **Widening the Application Display Frame:**
 - > Click & Hold the horizontal boundary of the Frame and drag it left or right as required for viewing.

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3. Standard Software Functions & and Features #3

- ❖ Following is a brief overview of some more of these functions & features .

Function/Feature

- ❖ Within the Application Display Frame there are five different “display modes”
 - (1) **Directory (Search) Page** e.g. List Incidents
 - (2) **Form Page** e.g. New Incident
 - (3) **Selection Page** e.g. See Accountability
 - (4) **Graphic Page** e.g. View Business DNA
 - (5) **Report Page** e.g. DNA Risk Balance
- ❖ **Form Pages:**
 - > A Form Page can either already be populated with data, or it can be a blank form ready for data entry.
 - > A Form Page can also have a “Directory List” at the bottom of the Application Display Frame which forms a quick reference or direct link to dependent and more detailed data.
 - > A Form Page is made up of individual data fields. If a field box is “white” then data can be optionally entered in this field. If a field box is “grey” then has been pre-populated and data cannot be entered.

Function/Feature

- ❖ **Form Pages (cont.)**
 - > If a field box is “yellow” the data entry is mandatory.
 - > Field boxes can be populated by typing, from drop-down buttons, or from date pop-ups.
 - > Some “white” box fields may be pre-populated however these can be over written if required.
- ❖ **Form Page Menu Buttons**
 - > Most Form Page Menus have the following buttons: Passing the mouse-pointer over these buttons will display their function. If a button is “greyed out” then it is not active.
 - <**New**> button will open a blank form to enter a new data item
 - <**Save**> button must be clicked to save any data changes on a Form Page.
 - <**Delete**> button is normally “inactive” however if it is active then clicking on it will delete the data within the form
 - <**Search**> button will open a Directory Page

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3. Standard Software Functions & and Features #4

- ❖ Following is a brief overview of some more of these functions & features .

Function/Feature

- ❖ **Within the Application Display Frame there are five different “display modes”**
 - (1) Directory (Search) Page** e.g. List Incidents
 - (2) Form Page** e.g. New Incident
 - (3) Selection Page** e.g. See Accountability
 - (4) Graphic Page** e.g. View Business DNA
 - (5) Report Page** e.g. DNA Risk Balance
- ❖ **Selection Pages:**
 - > A Selection Page is one that initially displays as a “template” and is displayed without any data. A “selection field” is located at the top of the form and when data is entered in this field then the form is populated with the appropriate data.
 - > Typically generated “display reports” use this page type.

Function/Feature

- ❖ **Graphical Pages:**
 - > Some pages have a “graphical” representation and most elements within the page are “active” links to other application areas of AMS. The two major pages that illustrate this type of page are the Business DNA page and the Job 5x5 pages. All items within these graphics are active.
- ❖ **Report Pages:**
 - > These pages are created in a “print friendly” format so that data within the Application Page can be printed on one-page of a printer.
 - > The Print Links nominate the printer setup required (portrait or landscape) and the File/Page Setup options should be set with all margins set to 2.5 to obtain one-page printing.
 - > [G] buttons generate summary reports for printing.

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3. Standard Software Functions & and Features #5

❖ Following is a brief overview of some more functions & features

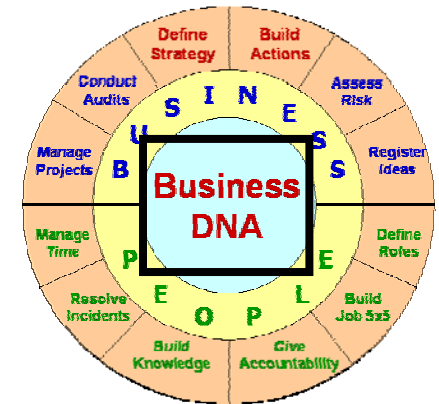
Function/Feature	TRY IT
<ul style="list-style-type: none">❖ Action Reminders:<ul style="list-style-type: none">> Action reminders can be generated by a user themselves to remind them of something that they must do (see the [T] button on any form Page Menu), OR,> Action reminders can be generated automatically by the system where a “due date” of an Action has been created as part of a Project Action or an Incident resolution.> Action Reminders can be changed or deleted by the user at any time.	<ul style="list-style-type: none">❖ Main Menu/+AMS/Action Reminders.<ul style="list-style-type: none">> Lists all reminders overdue❖ Click on any “folder icon” within reminder item.<ul style="list-style-type: none">> Takes the user to the actual item that directly relates to the reminder❖ Click “Back” button in Page Menu to go back to the Action Reminder list.
<ul style="list-style-type: none">❖ Short-cuts:<ul style="list-style-type: none">> There are many short-cuts incorporated into the operation of the Navigator and below are just some of these.> In any “date field” the entry of + or – followed by a number will insert a date that is plus or minus that number of days from today.> In any “date field” the entry of a full-stop plus the <enter>key will insert today’s date.	<ul style="list-style-type: none">❖ Short-cuts (cont.)<ul style="list-style-type: none">> The [<<] : [<] : [>] : [>>] menu buttons in any Page Menu will advance the item displayed to the next logical record in the database. E.g. if a user was viewing Operational Action 1.23 then clicking on each respective button would display the following; [<<] displays Action 1.11; [<] displays Action 1.22 [>>] displays Action 5.55; [>] displays Action 1.24

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4. At the heart of the system is the "Business DNA"



- ❖ The Business DNA a simply structured, but unique view of the most important 125 business operations so that all employees UNDERSTAND the business and the major "operational actions" that are needed to run the business

OUTCOMES

- ❖ A "one page" view of the business (the Business DNA), clarifying the key Actions (value processes) and the overall strategy and operation of the business.
- ❖ An overall risk assessment of the major Action areas of the business identified within the Business DNA.
- ❖ An understanding of where **priority attention** needs to be directed to quickly improve business operations

TRY IT

- ❖ Main Menu/+AMS/Improve Performance/View Business DNA

(A Business DNA looks like this)

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5. Defining the "Strategy" (the Business 5x5)



- ❖ The "top level" 5x5 is the view of the strategic business elements and write a brief overview of the "strategy" for each element.

OUTCOMES

- ❖ A "top level" strategic view of the business (the Business 5x5), clarifying the Key Actions and the strategy of the business.
- ❖ An overall summary of the CEO's strategy and vision for each major area of the business that then forms the back-bone of the Business DNA.
- ❖ A framework under which the 125 x Operational Actions of the business (the Business DNA) are built and to which all staff has access for a better understanding of the business

TRY IT

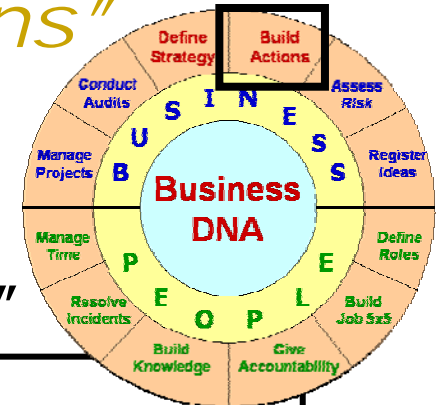
- ❖ Main Menu/+AMS/+Direct the Business/Define Strategies
- ❖ Click on Level-1 Action
 - > Allows the entry of the business strategy for this Key Action
 - > Shows the 5 x Level-2 Actions that make up the Key Action.
- ❖ Click on a Level-2 Action
 - > Allows the entry of the business strategy for this Level-2 Action
 - > Shows the 5 x Level-3 Operational Actions that make up the L-2 Action

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6. Building the "Operational Actions"

- ❖ The 125 (5x5x5) "operation level" actions are the detailed view of the business and establish the base for the business "performance characteristics"



OUTCOMES

- ❖ **The definition of the Operational Actions**
 - > These constitute the Business DNA.
- ❖ **A solid basis for conducting risk analysis**
 - > Assessing risk only in areas that matter.
- ❖ **A logical basis for the creation of performance improvement.**
 - > Accountability, measures, targets, projects and overall performance management can now have a greater focus.
- ❖ **Knowledge, incidents, and reporting can now have a logical business.**
- ❖ **P.S. All Actions MUST start with a descriptive "verb" so that the correct emphasis is put on the Action.**

TRY IT

- ❖ **Main Menu/ +AMS/Improve Performance/View Business DNA**
- ❖ **Click on any Level-3 Action**
- ❖ **Now click on each TAB within the Application Page** to see the content and performance characteristics of any Level-3 Operational Action.
- ❖ **Clicking on the ← button** will return you to the previous display.
- ❖ **See another view** of the Operational Actions by clicking on: **Main Menu/ +AMS/Search All Business/List DNA Actions**

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6.1 Building the "performance characteristics" of each Operational Action in the Business DNA

ID	Action	Overall Risk	Who (1)	Who (2)
1.11	Investigate new markets & products	High	(RB) Robert Best	
1.12	Create, revise & implement marketing plan	High	(CL) Clair Long	(RHB) Rick Hamilton-Bell
1.13	Expand existing markets & products	Low	(CL) Clair Long	(RB) Robert Best

"Incidents" TAB records incidents that relate primarily to this Action

"Projects" TAB displays the improvement projects for this Operational Action

"Ideas" TAB is input data from any staff suggesting any ideas to improve the Operational Action

"Audit" TAB displays the output from a team audit of an Operational Action

"The Action" TAB displays the basic components of an Operational Action

"Knowledge" TAB displays the elements of business knowledge available to execute an Operational Action

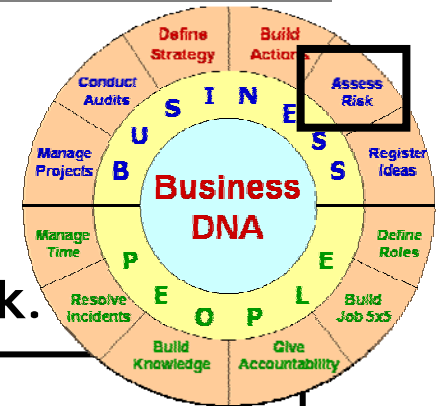
"Risks" TAB displays the elements of risk that exist to threaten the outcome of an Operational Action

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7. Assessing "Risk"



- ❖ **The objective** is to quickly gain an understanding of the "health" of the business and ALSO which Operational Actions are putting the business at risk.

OUTCOMES

- ❖ **Improved visibility and transparency**
 - > Business Risk analysis is performed jointly with management and accountable personnel and is therefore should always be a "consensus view".
- ❖ **Both an "overall risk" assessment plus a detailed risk assessment.**
 - > Initially an "overall risk" assessment is made but this can be later supported at each Operational Action area with a detailed risk analysis that is normally part of an Improvement Audit.
- ❖ **Creation of business Measures and Targets** for all high risk operational actions

TRY IT

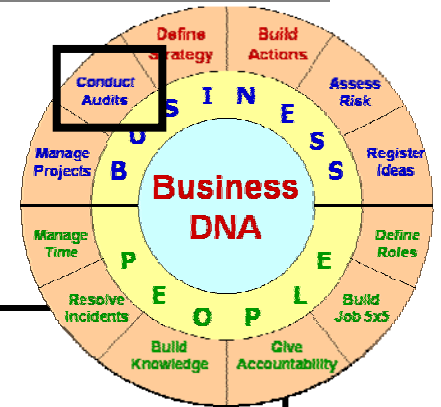
- ❖ **Main Menu/+AMS/Improve Performance/View Business DNA**
- ❖ **Click on any Level-3 Action and select "The Action" TAB**
 - > The field "Overall Risk" determines the colour code in the Business DNA
- ❖ **Click on the "Risks" TAB**
 - > Individual risks in each Operational Action can be analysed separately and risk mitigation steps initiated as part of an Improvement Project.
- ❖ **Main Menu/+AMS/Search All Business/List Risks**
 - > Provides a Directory Search Page of all identified risks that enables keyword search of a risk element.

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8. Improvement "Audits"

- ❖ **The objective** is to work in teams to audit areas of the business to determine how best to improve it.



OUTCOMES

- ❖ **Action Improvement Audits** of a DNA Operational Action are normally conducted by the person "accountable" for the Action.
- ❖ **Based on the Outcome of an improvement audit, an improvement project may be launched**
 - > Identification of most appropriate financial and non-financial measures to track improvements will be established
- ❖ **An improvement focus** is established with the team to gain consensus on the best recommendation required
- ❖ **Increased staff involvement** and proactive participation in solution
- ❖ **Establishment of Knowledge** required to optimise the performance of each Action and "how to" links to necessary information

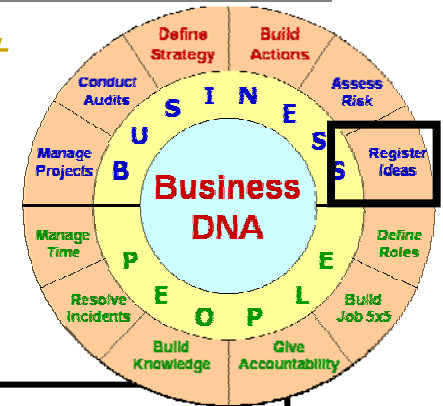
TRY IT

- ❖ **Main Menu/+AMS/Improve Performance/View Business DNA**
- ❖ **Click on any Level-3 Action followed by the "Audit" TAB**
 - > This leads the user to the Audit Q&A for the Operational Action selected.
 - > Standard questions are per-populated as a guide, however the wording of any of these can be changed to better relate to the Action.
 - > Answers to the audit questions form the basis of the final recommendations of the audit. An improvement project will normally result from an Improvement Audit and the person accountable for the Operational Action should subsequently manage the Improvement Project.
- ❖ **Main Menu/+AMS/Search All Business/List Audits**
 - > Provides a Directory Search Page of all active audits that enables keyword search of an audit element.

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9. Register "Ideas" for Improvement



- ❖ **The objective** is to stimulate all staff to suggest positive ideas to improve the business.

OUTCOMES

- ❖ **A "Registry of Ideas" from staff**
 - > All personnel encouraged to contribute new ideas for improving the Operational Actions of the business.
- ❖ **Recognition of Idea Contribution**
 - > The senior persons who are accountable for an operational action are responsible for accepting or rejecting the ideas.
 - > The initiator of the idea is advised of the status by the acceptor.
- ❖ **Provides general staff input for a subsequent Improvement Audit of an Action.**
 - > Often a person outside of a business area can make an innovative suggestion because they do not carry any "history".

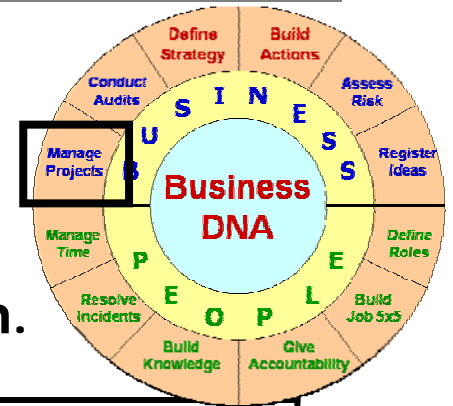
TRY IT

- ❖ **Main Menu/+AMS/Improve Performance/View Business DNA**
- ❖ **Click on a Level-3 Operational Action**
 - > Click on the "Ideas" TAB to see the list of ideas relating to this Action.
 - > Add a new idea.
 - > Click on any Idea to see full details.
- ❖ **Main Menu/+AMS/Search All Business/List Ideas**
 - > Provides a Directory Search Page of all suggested ideas that enables keyword search of an element of an idea.
 - > All search functions operate in the standard way.

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10. Run "Improvement Projects"



- ❖ **The objective** is to implement improvements to an Operational Action area via "projects" that are managed by the person accountable for the Action.

OUTCOMES

- ❖ **A Project Action Plan**
 - > A "project" is always directly linked to an Operational Action area and the person accountable for the project is normally the same person that is accountable for the Action .
- ❖ **An email communication system**
 - > To provide a active communication of project action due dates to all project team members.
- ❖ **Provide a progress tracking system**
- ❖ **Integrated due date reminder system**
- ❖ **Provide Project Cost estimations**

TRY IT

- ❖ **Main Menu/ +AMS/Improve Performance/View Business DNA**
- ❖ **Click on Level-3 Operational Action**
 - > Click on the "Projects" TAB to obtain a list of all projects that have been initiated to address that Operational Action.
 - > Click on any project line to open a project.
 - > Add a new project from this page.
- ❖ **Main Menu/ +AMS/Search All Business/List Projects**
 - > Provides a Directory Search Page of all projects that enables keyword search of any element of a project.
 - > All search functions operate in the standard way.

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10.1 Implementing "Improvement Projects" as a result of Action Audits

The screenshot displays a web browser window with the following details:

- Project ID:** BIP01
- Project Name:** Marketing Improvement Project
- Start Date:** 28/02/2005
- Due Date:** 28/10/2005
- Description:** Create more market awareness for our services & products with our Resellers
- Status:** 3 - In Progress
- Accountable Person:** MG - Mary Guest
- Est. Person Days:** 10.20
- Est. Cost:** 7,390.00
- Associated Actions:**
 - 1.12 - Create, revise & implement marketing plans
 - 1.15 - Provide marketing statistics for decisions
 - 1.51 - Understand client needs
 - 1.11 - Investigate new markets & products
 - 1.13 - Expand existing markets & products
 - 1.14 - Manage marketing consultants/projects

Project Summary from "Details" TAB

"Actions" TAB gives breakdown of project actions and persons responsible for on-time delivery of each action.

Person accountable for the entire project

Estimated cost of entire project as the sum of each project action

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11. Record Time on "Job Actions"

- ❖ **The objective** is to provide a method for an employee to record their time spent on a specific job action or DNA Action.



OUTCOMES

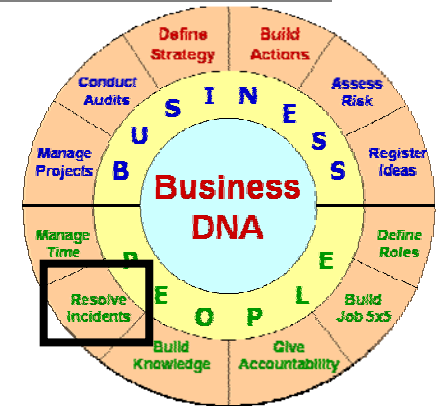
- ❖ **A record of time spent**
 - > This time recording system provides the ability to track time spent on any AMS project.
- ❖ **A method of accumulating time**
 - > Over any variable period
 - > Past or present time
- ❖ **A method of reporting time**
 - > Displays an itemised report of time spent by any member of staff.

TRY IT

- ❖ **Main Menu/+AMS/Involve Staff/Manage Time**
- ❖ **Check date and amend if required**
 - > Enter details on top line of form and save after each line item.
- ❖ **Click on [Q] button in Page Header**
 - > Choose from the drop-down box the Resource (person) on which you wish to report.
 - > Enter the start and finish dates for the reporting period required.
 - > Click on the "tick" box in the Application Page Header

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12. Resolve "Incidents"



- ❖ **The objective** is to record and resolve "ad hoc" incidents or issues that occur in the day-to-day running of the business.

OUTCOMES

- ❖ **A written record of all incidents**
- ❖ **An email communication system**
 - > Provide a active communication of incident resolution and due dates to persons charged with resolution.
 - > Provide feedback to initiator after incident resolution.
- ❖ **Provide a incident tracking system**
 - > An incident can be linked to an Operational Action or it can be free-standing. Both are tracked.
- ❖ **Integrated due date reminder system**
 - > All incidents are recorded in the Action Reminders of the person designated to resolve the incident.

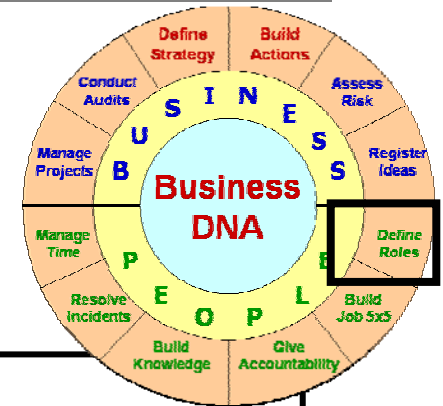
TRY IT

- ❖ **Main Menu/ +AMS/Improve Performance/View Business DNA**
- ❖ **Click on a Level-3 Operational Action**
 - > Click on "Incidents" TAB to list incidents that are recorded against an Action
 - > Click on the incident line item for details
- ❖ **Main Menu/ +AMS/Search All Business/List Incidents**
 - > Provides a Directory Search Page of all incidents that enables keyword search to quickly locate an incident.
- ❖ **Main Menu/ +AMS/Enter New Items/ New Incident**
 - > To add a new incident that may or may not, be related to an Operational Action.

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13. Define "Roles" and assign staff



- ❖ **The objective** is to define the roles, basic staff details, and Resource-ID's of all employees.

OUTCOMES

- ❖ **A "Role Register"**
 - > All staff are allocated a role from the Role Register
- ❖ **An Employee List**
 - > Basic employee details are held within the system. Each employee must have an email address and a person to whom they report.
- ❖ **An assigned Resource-ID (Username)**
 - > This Resource-ID is used by the Systems Administrator when adding a new user to the system and becomes the Username of each user.

TRY IT

- ❖ **Main Menu/ +AMS/Search All Business /List Roles**
 - > List current roles (job titles) or add additional roles to register.
 - > It is MANDATORY that roles be added before staff entries are created because each staff member must be allocated a valid role.
- ❖ **Main Menu/ +AMS/Search All Business /List Employees**
 - > Lists current staff and allows adding a new staff member. Just open any existing staff member and then click on the [New] button in the Page Menu. A naming convention must be used with the staff Resource-ID and we suggest the initials of the staff member. Fill in the details and "Save" the new person.
 - > The "Search all Staff" button at the top of the form displays terminated staff as well, together with the date of their leaving.

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14. Assigning "Accountability"



- ❖ **The objective** is to assign every 125 Operational Action from the Business DNA to a person or role which will form the back-bone of their Job5x5.

OUTCOMES

- ❖ The pre-requisite of this step requires that each Operational Action has been assigned to a person/role.
- ❖ The output of this step is then simply a display report that identifies the accountability of an individual.
- ❖ An individual's Job 5x5 is then created with the assistance of this report (for each staff member) as a direct result of "cascading down" from the Business DNA Operational Actions and allocating accountability for these Actions to people.

TRY IT

- ❖ **Main Menu/ +AMS/Involve Staff /See Accountability**
 - > A "blank" template opens that requires the selection of a current staff member from the drop-down box of the "Who" field.
 - > After selection, then click on the "Tick" box to display the Accountability Report for that person.
- ❖ **Print the Accountability Report**
 - > Set up the printer File/Page Setup to landscape and 2.5 margins all around. Click OK.
 - > Select the Print Version (Text Link) and print report.
 - > This report is then used during the Job5x5 creation for that person.

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15. Build people's jobs and create their "individual job actions" under the business

AMS Demonstration - Richard Burley - 29/01/2006 - [AMSTEST/1/EN] - Microsoft Internet Explorer

Address: http://202.7.88.59/csp/AMSTEST/www.cls

Richard Burley, National Sales Manager, DemoCompany Pty Ltd, Contact: 02-9431 5305, Reporting To: Top Honcho, rburley@themanagementpractice.com

Job 5 x 5 Summary

1. Develop & Implement Marketing Projects	2. Generate Qualified Business Opportunities	3. Prepare Proposals and Quotes	4. Follow-up & convert quotes to orders	5. Develop Key Accounts
1.1 Prepare Direct Mail Campaigns	2.1 Develop & maintain company Price List	3.1 Qualify all quotes	4.1 Foster 'Key Account' culture	5.1 Develop & maintain all sales collection
1.2 Develop Reseller Alliances	2.2 Ensure 'solutions' focus within all sales	3.2 Submit sales forecast to CEO	4.2 Develop incremental business from client base	5.2 Develop & maintain input data & website wording
1.3 Target Industry Association alliances	2.3 Prepare job quotations	3.3 Analyse lost business & keep client history	4.3 Resolve any client issues	5.3 Recommend new marketing initiatives
1.4 Develop strategic Distributor Relationships	2.4 Include 'upsell' in all proposals	3.4 Recommend product changes & keep client history	4.4 Obtain client feedback & written references	5.4 Develop strong bond with S/W developers
1.5 Maintain continuous qualified prospect pipeline	2.5 Set & monitor high quality service delivery	3.5 Achieve sales target	4.5 Resolve & convert quotes	5.5 Implement special marketing projects

Personal Level 2 Actions

ID	Description	Performance Review	Measurement	Target Output	Performance Report	Frequency
	Prepare Direct Mail Campaigns	Monthly	Letters mailed or emailed	100		Monthly
	Develop Reseller Alliances	Quarterly				Quarterly
	Target Industry Association alliances	Quarterly				Annually
	Develop strategic Distributor Relationships	Quarterly				Annually
	Maintain continuous qualified prospect pipeline	Monthly	New prospects per day	1		Daily
2.1	Develop & maintain company Price List	Annually	Published price list			Quarterly
2.2	Ensure 'solutions' focus within all sales	Annually				Monthly
2.3	Prepare job quotations	Quarterly	# of proposals submitted	5		Monthly
2.4	Include 'upsell' in all proposals	Annually				Annually
2.5	Set & monitor high quality service delivery	Annually	New sales to existing clients	12		Annually
3.1	Qualify all quotes	Quarterly	Lost quotes/accepted sales	Less than 10%		Annually
3.2	Submit sales forecast to CEO	Quarterly				Monthly
3.3	Analyse lost business & keep client history	Annually				Quarterly
3.4	Recommend product changes & keep client history	Annually				Quarterly
3.5	Achieve sales target	Monthly	Value of business contracted	\$250,000		Quarterly
4.1	Foster 'Key Account' culture	Annually				Annually
4.2	Develop incremental business from client base	Quarterly	+\$ sales from existing clients	10%		Annually
4.3	Resolve any client issues	Annually	Issues escalated by clients	Less than 3		Annually
4.4	Obtain client feedback & written references	Annually	Written reference	3		Annually

Level-1 Job Actions

Summary of Level-2 Job Action Details

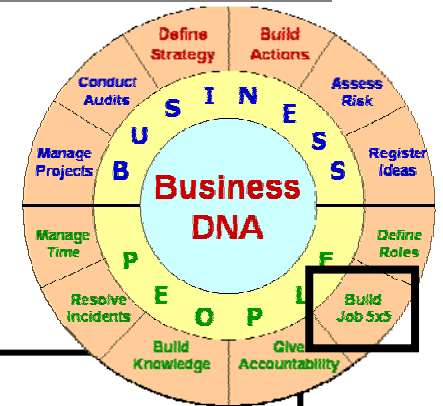
Level-2 Job Actions

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15.1 Job 5x5 Actions



- ❖ **The objective** is to create a one-page Job5x5 that is a direct reflection of the Operational Actions allocated from the Business DNA.

OUTCOMES

- ❖ **An individual's Job 5x5 is created** for each staff member as a direct result of "cascading down" from the business DNA actions and allocation of accountabilities.
- ❖ **The setting of realistic Measures and Targets** for all job actions (a simple one-page summary of every person's job)
- ❖ **An assessment of the risk** of each person's Job Actions.
- ❖ **Links to "how to" knowledge,** documents and procedures within the Knowledgebase to enable each person to fulfil and track their specific job responsibilities
- ❖ **A simple performance review system**

TRY IT

- ❖ **Main Menu/ +AMS/Involve Staff /Select Job 5x5**
 - > Displays List of current employees
 - > Click on an employee to display Job 5x5
- ❖ **Click on each Job 5x5 Summary header Action**
 - > Complete each Level-1 Action details.
 - > Save after each form data entry.
- ❖ **From within each Level-1 Action**
 - > Click on any Level-2 Action from the list and complete details.
- ❖ **After data entry then Print the Job5x5**
 - > Set up the printer File/Page Setup to landscape and 2.5 margins all around. Click OK.
 - > Select the Print Version (Text Link) and print the Job 5x5 report (preferably in colour).

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16. Build "Knowledge" for better Business and Staff performance



- ❖ **The objective** is to link the important items of business knowledge direct to both the Operational Actions and the Job 5x5's of the people to improve efficiency and effectiveness in both areas.

OUTCOMES

- ❖ Direct Links from Operational Actions to business knowledge.
- ❖ Direct Links from Job Actions to business tools and knowledge.
- ❖ Upload of knowledge to remote server to allow remote internet access to all key business processes.

TRY IT

- ❖ **Main Menu/ +AMS/Improve Performance/ View Business DNA**
- ❖ **Click on a Level-3 Operational Action**
 - > Click on "Knowledge" TAB displays a list of current knowledge linked to the Action.
 - > Add a new knowledge item by clicking on icon
- ❖ **Main Menu/ +AMS/Involve Staff /Select Job 5x5**
 - > Click on staff member to display Job 5x5.
 - > Click on a Level-2 Job Action.
 - > Click on "Knowledge" TAB to view or add item
- ❖ **Main Menu/ +AMS/Search All Business /List Knowledge**
 - > Provides a Directory Search Page of all knowledge items for searching by keyword

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AMS Demonstration

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How to Use AMS (1/1/RB.1/EN/202.007.067.061)



The Management Practice

Implementation Tour

(Click here to download a 10-page Getting Started Guide.)

BUSINESS Step Sequence
Business Introduction

1. Define Strategies
2. Business DNA
3. Check Actions
4. Manage Risk
5. Conduct Audits
6. Register Ideas
7. Improvement Projects



PEOPLE Step Sequence
People Introduction

8. Define Roles
9. Staff Resources
10. See Accountability
11. Review Job 5x5
12. Source Knowledge
13. Manage Time
14. Incidents

Action Management System

Start