The CX Lean Tool

Description of the CX Lean Tool

The CX Lean Tool is a mental model "test kit" that can be used for analysis of any current or new system, process or project. "C" in the name stands for "congruence" or "equal state" and "X" stands for the myriad of ways that congruence can be developed or improved in a system, resulting in up to 21 points of congruence. This tool fully employs the Plan-Do-Check-Adjust organizational learning loop, a foundational concept of Lean.

The CX Lean Tool identifies two Areas, Organizational Intelligence and Performance Management, with three Elements each. The three Elements for Organizational Intelligence are Essential Ideas, Essential Processes/Protocols/Structures/Taxonomies and Essential Assessments/Audits. The three Elements for Performance Management are Essential Actions, Essential Standards, and Essential Deliverables. The interrelationships between the six Elements represent points of Congruence.

When using this CX Lean Tool, a visual depiction of the current state of a system or process is created for an easier examination and prioritization of points of improvement needed in a system. By improving a system to include all six Elements, to place all Six Elements in the appropriate Area and to create Congruence between Elements, immediate benefits can be realized. The CX Lean Tool helps managers test for three states in a system. First, the model tests for the presence of six essential Elements. Second, the model tests for the placement of six Elements into Organizational Intelligence activities and Performance Management activities. Third, the model tests for the Congruence of these Elements within and between using three Metrics: Efficiency, Effectiveness, and Relevance.

The CX Tool has been used in organizations to improve systems and processes that include strategic planning, core service programming, leadership development, technology systems, budgeting processes, support services, employee evaluation systems, and professional development/training. Directions for using the CX Lean Tool and definitions of the Areas, Elements and Metrics follow.

The CX Lean Tool

Directions for the CX Lean Tool

1. Consider any process, system or initiative in your organization and read the attached definitions of the two Areas, six Elements and three Metrics to understand the scope of the CX Lean Tool.

2. Identify a specific system, process or initiative, whether strategic or tactical, in your organization for analysis in its current state.

3. Beginning with any of the six system Elements, identify one that is present in your system and enter a short description of it in the boxed space provided.

4. Then consider which, if any, of the other five system Elements are present in your current system and write short descriptions of those in the boxed spaces provided. You may decide there are some missing system Elements, so leave those spaces blank. The absence of any of the six Elements is a point of improvement.

5. Last, consider the three Metrics of Congruence both vertically and horizontally between present Elements. Circle those ratings numbers for Efficiency, Effectiveness, Relevance and then Congruence. Given the presence of all six Elements, it is possible to identify the state of Congruence between three horizontal pairs (Essential Ideas to Essential Actions, Essential PPSTs to Essential Standards and Essential Assessments/Audits to Essential Deliverables) and among two vertical quadruplets (Essential Ideas to Essential PPSTs to Essential Assessments/Audits to Essential Ideas and Essential Actions to Essential Standards to Essential Deliverables to Essential Actions). In the end, there may be Congruence between all Elements, a possible 21 states of Congruence. For beginners, it is most helpful to examine the horizontal pairs and vertical quadruplets first.

6. Based on the absence of an Element or based on the worst Congruence rating, identify areas for improvement. Develop a description of the future state and reassess that state after initiating improvements using this CX Lean Tool.

The CX Lean Tool

Definitions for the CX Lean Tool

<u>Two System Areas</u>

Organizational Intelligence is the "shared smarts" or "IQ" of a corporate group based on its capacity to create and manage knowledge well.

Performance Management is the "shared work" of a corporate group based on its capacity to create and manage activity well.

<u>Six System Elements</u>

<u>Organizational Intelligence</u>

Essential Ideas are key concepts, major theories, big ideas or "meaning" that exists collectively. Examples are shared vision or benchmarks of practice, like the need to diversify, the benefit of new market development, the impact of going "green," or the value of collaborating to co-innovate.

Essential Process-Protocol-Structural understandings are identified steps, forces and systems, both tacit and explicit, that are commonly understood. Examples are governance structures, business architecture, policies and practices, like budgeting processes, HR protocols, IT systems, Customer Records Management systems, training and development, manufacturing processes, grievance processes, social networks or strategic planning.

Essential Assessments-Audits are corporate data collection and analysis activities using quantitative and/or qualitative data and formative or summative assessments. Examples are analytics of operations or business intelligence, such as resource allocation effectiveness, performance activity results, ROI, scalability data, contextualized results, test or performance scores or achievement data.

<u>Performance Management</u>

Essential Actions are core values, initiatives, corporate ethos, and traditions that demonstrate what is highly valued in the culture by what is done. Examples are customer service, guarantees of conduct or quality, implementation of new initiatives, use of e-learning for training, product recalls, new marketing initiatives based on globalization, resource allocation to support an initiative, or capital expenditures.

Essential Standards in action are compliance-based or professionally-based codes designed to produce a result valued in the culture. They can be explicitly defined or tacitly understood behaviors. Examples are risk management compliance, key performance indicators or operational standards, like SOX compliance, globalization standards, expectations for creativity, common syntax, professional codes of conduct, organizational citizenship behavior, commonly shared practice or behavior shaped by culture.

Essential Deliverables in action are the valued tangible and intangibles results of corporate effort aligned with mission. Examples are realized transactional or transformational value, thought leadership, societal improvement, quality products, outstanding service delivery, customer satisfaction, research and development breakthroughs or community service.

<u>Three Congruence Metrics</u>

Congruence is an equal state between Elements. Congruence, as opposed to equivalence or approximation, is a relation which implies a parallel existence. Congruence is not the same as alignment, which is more linear in nature. Congruence includes the concept of alignment, but is more expansive by including intensity, pace and interdependency of the interrelationship between Elements as being equal. The metrics of Congruence in the CX Lean Tool are Efficiency, Effectiveness, and Relevance.

Efficiency is a metric of Congruence that demonstrates the ability to achieve a desired result without wasted resources, energy or effort such as minimizing wasted time, motion or funds.

Effectiveness is a metric of Congruence causing an intended result that is favorable to organizational mission and performance such as facilitating sales objectives, employee productivity or financial stability.

Relevance is a metric of Congruence that is the sensible or logical connection that an activity has to a bigger scope such as department to organizational objectives, corporate to real-world issues, research and development to the marketplace, and executive goals to stakeholder value.

The CX Lean Tool

The Six System Elements

Organizational Intelligence

Notes   Scores

Essential Ideas

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Processes, Protocols, Structures

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Assessments, Audits

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Performance Management

Notes   Scores

Essential Actions

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Standards

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Deliverables

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

The CX Lean Tool

States of Congruence: Horizontal Pairs

Intelligence   **Management**

Notes   Scores

Essentail Ideas

Current

Efficiency	1	2	3	4	5
Effectiveness	1	2	3	4	5
Relevance	1	2	3	4	5
CONGRUENCE	1	2	3	4	5

Future

Efficiency	1	2	3	4	5
Effectiveness	1	2	3	4	5
Relevance	1	2	3	4	5
CONGRUENCE	1	2	3	4	5

Essential Actions

Essentail Processes, Protocols, Structures

Current

Efficiency	1	2	3	4	5
Effectiveness	1	2	3	4	5
Relevance	1	2	3	4	5
CONGRUENCE	1	2	3	4	5

Future

Efficiency	1	2	3	4	5
Effectiveness	1	2	3	4	5
Relevance	1	2	3	4	5
CONGRUENCE	1	2	3	4	5

Essential Standards

Essentail Assessments, Audits

Current

Efficiency	1	2	3	4	5
Effectiveness	1	2	3	4	5
Relevance	1	2	3	4	5
CONGRUENCE	1	2	3	4	5

Future

Efficiency	1	2	3	4	5
Effectiveness	1	2	3	4	5
Relevance	1	2	3	4	5
CONGRUENCE	1	2	3	4	5

Essential Deliverables

The CX Lean Tool

States of Congruence: Vertical Quadruplets

Intelligence

Notes | Scores

Essential Ideas

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Processes, Protocols, Structures

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Assessments, Audits

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Ideas

Management

Notes | Scores

Essential Actions

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Standards

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Deliverables

Current

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future

Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Actions

The CX Lean Tool

Additional States of Congruence

Intelligence   **Management**

Notes   Scores

Essentail Ideas

Current

Efficiency	1 2 3 4 5	
Effectiveness	1 2 3 4 5	
Relevance	1 2 3 4 5	
CONGRUENCE	1 2 3 4 5	

Future

Efficiency	1 2 3 4 5	
Effectiveness	1 2 3 4 5	
Relevance	1 2 3 4 5	
CONGRUENCE	1 2 3 4 5	

Essential Standards

Essentail Ideas

Current

Efficiency	1 2 3 4 5	
Effectiveness	1 2 3 4 5	
Relevance	1 2 3 4 5	
CONGRUENCE	1 2 3 4 5	

Future

Efficiency	1 2 3 4 5	
Effectiveness	1 2 3 4 5	
Relevance	1 2 3 4 5	
CONGRUENCE	1 2 3 4 5	

Essential Deliverables

Essentail Processes, Protocols, Structures

Current

Efficiency	1 2 3 4 5	
Effectiveness	1 2 3 4 5	
Relevance	1 2 3 4 5	
CONGRUENCE	1 2 3 4 5	

Future

Efficiency	1 2 3 4 5	
Effectiveness	1 2 3 4 5	
Relevance	1 2 3 4 5	
CONGRUENCE	1 2 3 4 5	

Essential Actions

The CX Lean Tool

Additional States of Congruence

Intelligence		Management
	Notes	Scores

Essentail Processes, Protocols, Structures

Current
	1	2	3	4	5	
Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future
Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Deliverables

Essentail Assessments, Audits

Current
Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future
Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Actions

Essentail Assessments, Audits

Current
Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Future
Efficiency	1	2	3	4	5	
Effectiveness	1	2	3	4	5	
Relevance	1	2	3	4	5	
CONGRUENCE	1	2	3	4	5	

Essential Standards

The CX Lean Tool

Putting It All Together: **The Six System Elements, Horizontal Pairs, and Vertical Quadruplets**

Organizational Intelligence

Peformance Management

Notes — **Scores**

Essential Ideas

		1 2 3 4 5	
Current	Efficiency	1 2 3 4 5	
	Effectiveness	1 2 3 4 5	
	Relevance	1 2 3 4 5	
	CONGRUENCE	1 2 3 4 5	
Future	Efficiency	1 2 3 4 5	
	Effectiveness	1 2 3 4 5	
	Relevance	1 2 3 4 5	
	CONGRUENCE	1 2 3 4 5	

Essential Ideas

Essential Actions

		1 2 3 4 5	
Current	Efficiency	1 2 3 4 5	
	Effectiveness	1 2 3 4 5	
	Relevance	1 2 3 4 5	
	CONGRUENCE	1 2 3 4 5	
Future	Efficiency	1 2 3 4 5	
	Effectiveness	1 2 3 4 5	
	Relevance	1 2 3 4 5	
	CONGRUENCE	1 2 3 4 5	

Essential Actions

Date: _____

Project Name: _____

Project Description: _____

Essential Processes, Protocols, Structures

Essential Standards

Essential Processes, Protocols, Structures

Essential Standards

Essential Assessments, Audits

Essential Deliverables

Essential Assessments, Audits

Essential Deliverables

Metrics: **Scale:**

Metrics	Scale
Efficiency	1 = low . . . 5 = high
Effectiveness	2 = low . . . 5 = high
Relevance	3 = low . . . 5 = high
Congruence	4 = low . . . 5 = high

Essential Ideas

Essential Actions