



### David Huer

*Needle-in-the-haystack Business Investigator  
Solving difficult, confusing, hard-to-grasp problems  
Tenacious key-maker, unlocking butterfly effects*



<b>Type</b>	<b>OWNING MY TASKS WORK IMPROVEMENT PROJECTS - BROKEN OUT STEP-BY-STEP</b>
<b>Data Process</b>	<p><b>ELIMINATING 5-YEAR-OLD GLITCH BY END OF 3-REPORTING CYCLES</b></p> <p><b>2.5 months</b> <b>Recapturing \$millions of dollars of data Recapturing missing data for 100+ assets (tablets, notebooks, printers)</b></p> <p>By locating 5 un-captured Excel rows; after noticing a shifting 5-zero pattern over the first two cycles. Returning eight division budgets to plan. Delivering monthly reports early vs. the practice of 3 months late. First to deliver accurate data before deadlines. Eliminating review, inspection and rework tasks and an unwieldy 90-day reconciliation task. Eight Division Managers were again able to deliver accurate reports to Executive Board before their reporting deadlines.</p>
<b>Expertise:</b>	<p><b>Business Investigator/Analyst</b> Tenacious key-maker, unlocking powerful competitive advantage Trusted for my ability to simultaneously look at all sides of complex problems</p> <p><b>Contact Information:</b> U1: <a href="https://www.linkedin.com/in/davehuer/">https://www.linkedin.com/in/davehuer/</a> U2: <a href="https://angel.co/david-huer-01">https://angel.co/david-huer-01</a></p> <p><b>Skills &amp; Strengths</b></p> <ul style="list-style-type: none"> <li>• Experienced in industrial design thinking</li> <li>• Solving difficult, seemingly "impossible" problems</li> <li>• Synthesizing and distilling vast constellations of the tiniest of clues</li> <li>• White Hat systems gamer, unlocking rippling butterfly effects</li> <li>• Developing authoritative terms, their distinctions, and definitions</li> <li>• Polymath domains-combiner: Researching, editing, reporting</li> <li>• Applying my skills as a solo, team, and embedded investigator</li> </ul>

**(B) SOLVING 5-YEAR-OLD DATA GLITCH OVER 3-REPORTING CYCLES**

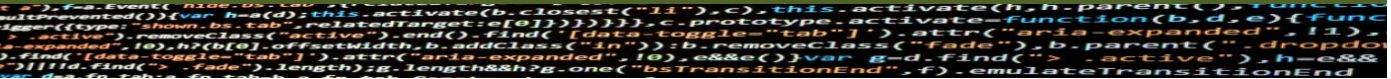


Image: Lorenzo Cafaro CCO : <https://www.pexels.com/photo/close-up-code-coding-computer-239898/>

<p><b>Issue</b></p> <p><b>My Activities</b></p> <p><b>Customer Outcome</b></p>	<p>Why is the data I'm receiving wrong, every month?</p> <p>Recapturing \$millions of dollars of data. Returning eight budgets to plan.</p> <p>Discovering 5 un-captured Excel rows after noticing a shifting 5-zero pattern over the first two cycles. Delivering eight monthly reports early vs. 90-days late. First to deliver accurate data before each monthly deadline. Eliminated data inspection and rework tasks and an unwieldy rolling repeating 90-day reconciliation practice. Eight Division Managers were again able to deliver accurate reports to the Executive Board by <i>their</i> monthly reporting deadline.</p>
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**SCENARIO**

Project Management Office [PMO] manages external contractors to provide services to other Divisions. Each consultant uses computer assets that go with them from project-to-project. *Project Support Analysts (PSA)* track the value of each asset every month. PSAs are to deliver accurate reports before deadline, but a hidden anomaly developed 5-years ago that could not be found. PMO developed a workaround that became standard practice.

**MY ACTIVITIES**

**Reviewing the task when executing the monthly reporting cycle**

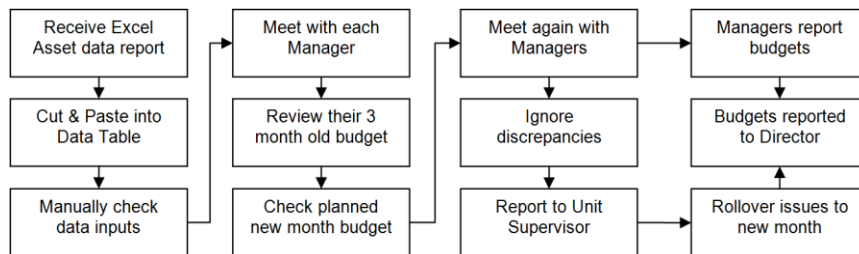
**1) Learn the Task**

**Phase A – "As Is":** Each asset has a cost that shifts between 8-10 budgets. My new responsibility was to receive, collate and report for 800-1,400 assets before each manager's budget due date, using an Excel spreadsheet tool. Reporting was 90-days late, had been this way for 5-years, and managers had stopped asking for our unit's deliverables by deadline.

**Value-stream mapping**

*No one had ever mapped the task before*

The procedure was not flowcharted. No employee had ever mapped the task. I am a visual learner; my first step was to map the tasks as they were being verbally taught using tip notes, to ensure my actions followed the procedure.



**Mapping Process:**

*No one had ever charted the advice tips passed from new assignee to new assignee*

- Reviewing notes (passed on by succeeding Task Holders)
- Sketching work procedure and each sub-task procedure
- Review with/report to supervisor

**Process:** Receive reports, transcribe data from inflowing excel sheet to master sheet. Tabulate all reports, meet with eight managers separately twice during process, report monthly pre-budget costs, learn consultant's new assignments; confirm data validity of data (ignoring discrepancies as 90-day rollovers adjust these each month); report to supervisor; upload report data to master monthly report for Director reporting to Executive Board.

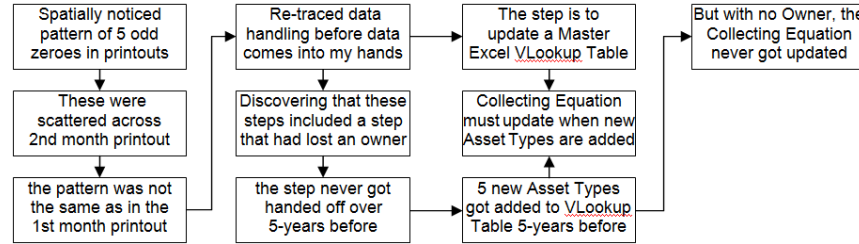
## 2) Review Issues

- a) Data received for review/hand-off was inaccurate every month
- b) PMO developed workaround 5-years before, to manage discrepancies
- c) The workaround process re-set the data stream to an accepted standard
- d) Reporting creep had created a 3-month accuracy gap (90-day overage)
- e) PSA Task Holders were unable to deliver reports by the official deadline
- f) Managing the anomaly to an accepted standard became the standard

### Noticing the tiny clue

### Noticing oddities in the data over two months - a shifting 5-zero pattern.

Value-mapped stages of this tiny sub-task



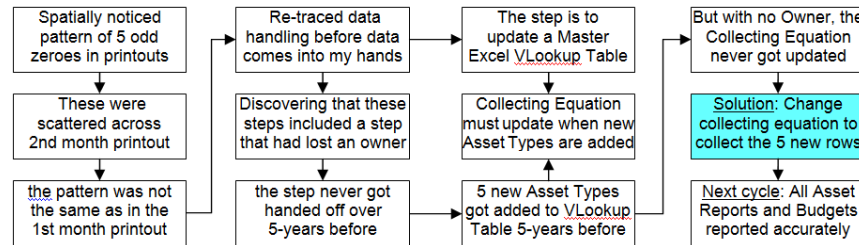
### Asking the new question

### Why does this pattern change?

Process discovery

PSAs never updated VLookup Equation when new Asset Types were added.

### What happens when we update the VLookup Equation?

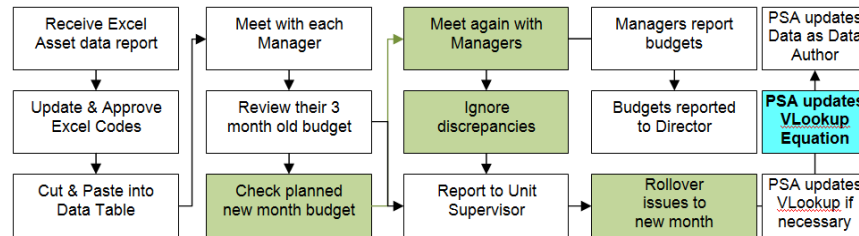


## 3) Results

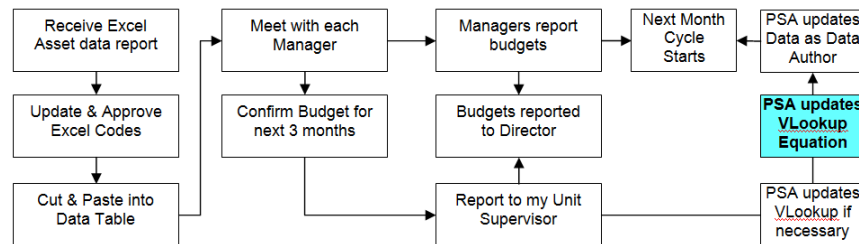
We captured misplaced costs for 100+ tablets, notebooks and printers.

### How does this change Capital & Operating Costs?

Green Blocks = Updating VLookup removes Green Steps from process



### Simplified Process



How Vetted:

Capital Costs: Asset Values recaptured. Capital account reconciled.

Belief Level:

Operations: First PSA to deliver accurate reports before monthly deadline. Delivering eight reports early vs. standard three months late. Eliminated data inspection and rework tasks and an unwieldy repeating 90-day reconciliation practice. All eight Division Managers were pleased. They were again able to accurately budget and deliver accurate reports to Board by *their* deadline.