



David Huer

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



Type	OWNING MY TASKS WORK IMPROVEMENT PROJECTS - BROKEN OUT STEP-BY-STEP
Data Process	<p>ELIMINATING 5-YEAR-OLD GLITCH BY END OF 3-REPORTING CYCLES</p> <p>2.5 months Recapturing \$millions of dollars of data Recapturing missing data for 100+ assets (tablets, notebooks, printers)</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>
Expertise:	<p>Business Investigator/Analyst Tenacious key-maker, unlocking powerful competitive advantage Trusted for my ability to simultaneously look at all sides of complex problems</p>
Contact Information:	https://www.linkedin.com/in/davehuer/
Skills & Strengths	<ul style="list-style-type: none"> • Experienced in industrial design thinking • Solving difficult, seemingly "impossible" problems • Synthesizing and distilling vast constellations of the tiniest of clues • White Hat systems gamer, unlocking rippling butterfly effects • Developing authoritative terms, their distinctions, and definitions • Polymath domains-combiner: Researching, editing, reporting • Applying my skills as a solo, team, and embedded investigator



<p>Issue</p> <p>My Activities</p> <p>Customer Outcome</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

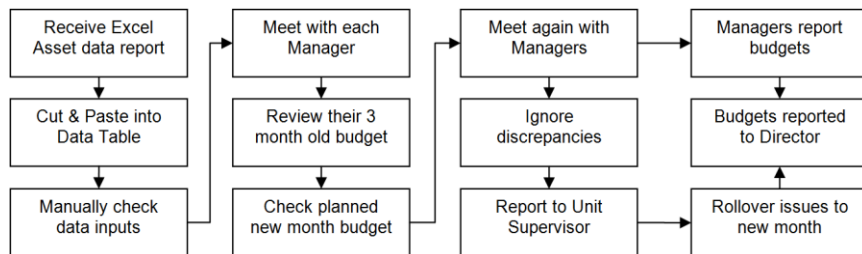
1) Learn the Task

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.

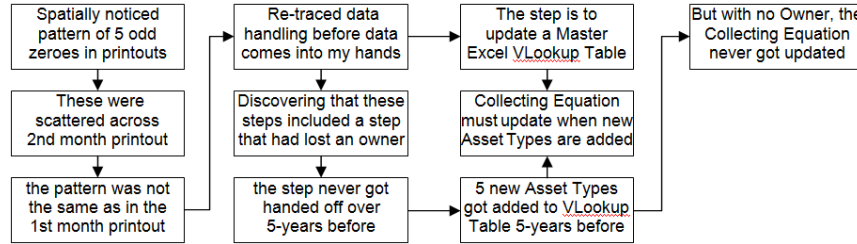
2) Review Issues

- 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



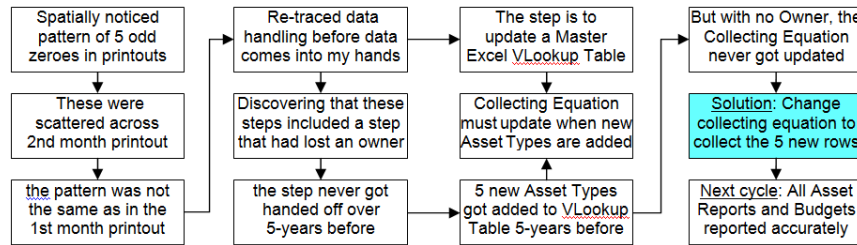
Asking the new question

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?

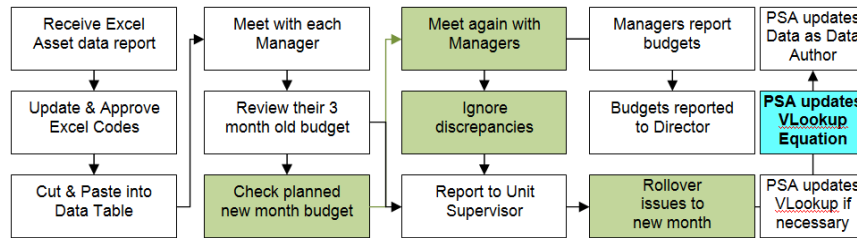


3) Results

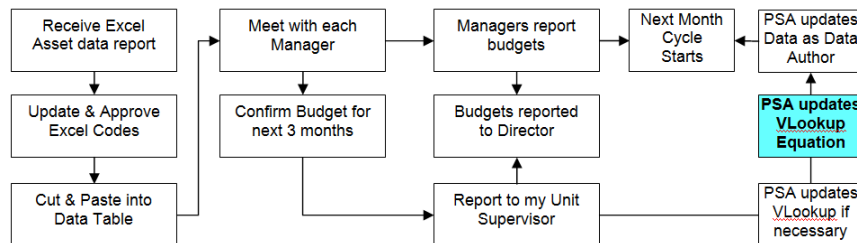
We captured misplaced costs for 100+ tablets, notebooks and printers.

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.