**STP Worksheet**

**S**- Situation **T**- Target **P**- Plan

**Team 1 Members**: Emma Johnson, Minju Lee, Deac Long, Bryton LaValley, Jessica Hosler

Attempts at delegation and action planning often fail because there is a lack of alignment on the definition of the situation. Furthermore, rarely do people clearly agree on the target state priorto formulating an Action Plan. Attaining agreement on ***what*** the situation and the ideal target state are, ***before*** attempting to discuss ***how*** to get to the target state will ensure solid Action Plans. When Action Plans are also developed by the people responsible for the results, the commitment to the plans will be higher and the opportunity for success significantly increased. If the endeavor is delegated, it’s important to check that there is agreement on the situation and the target with key interested parties, before implementing the Action Plan. This ensures that the Action Plan will be supported and deliver the results desired.

**Hurdle or Barrier we are addressing:**

The major barrier we are addressing is the inefficiency created by the current data analysis techniques utilized by SEL. Determining best practices for data analysis from a generated dataset similar to the actual data in SEL’s database will help us accomplish this task without risking the privacy of customer data.

**S - Defining the Situation:**

Ask questions beginning with what, when, where, why, who and how. For example: How is it affecting our customers, employees, financial results, competitive position, teamwork, communications and the quality of our products/services? Include facts, opinions, beliefs, feelings, hunches, and assumptions. Feelings and beliefs are valid, just because someone feels them. Only facts can be debated and tested. If there is disagreement on facts or significant facts are unknown, the action plan can include an information-gathering step.

Schweitzer Engineering Laboratories, SEL, is a company based out of Pullman, WA who creates products to help maintain and protect power grids. With their many customers who purchase their products, they keep information which helps to indicate performance metrics of the company. SEL company, mainly the Executives and sales force, wants to find a way to identify customers’ needs by using data they have collected on past customer experience. The end goal for SEL is to be able to increase their customer experience which in turn could increase sales.

**T- Identifying the Target:**

What is the ideal state? It’s the end of the assignment and we’ve done a great job, what does that look like? What outcomes or results are we looking for? **Check that for every point under the situation, there is a point under the target that addresses the issue.**

Our goal is to make rolling dashboards that can quickly and easily give information about customer experience for daily, monthly, and annual statistics to indicate whether customer experience increases or decreases for each customer. These dashboards should allow for statistics for all customers over time and by comparing customers side by side. We will obtain these statistics by using three different methods, basic math, analytical statistics, and machine learning. These statistics will then be used to predict future values for each customer.

STP Worksheet

**P- Plan**

**Action Planning Worksheet**

**Date: 02/11/2020** **Champion**: Jessica **Team: 1**

**Given the Situation and Target, our goal is**:

To provide SEL with the most accurate and legible analysis as possible.

To create a database system for easy access to company data.

To provide visualization for a better understanding of the data.

To apply machine learning for predictive analysis.

**Why this goal is important *OR* (CSF(s) it addresses:**

Recommend the most effective analytical method.

Provide new insights on customers using historical data.

**Measurable Result (How we’ll know it’s successfully completed):**

Easy to read dashboard that can show trends in customer experience and predict future outliers.

Action Steps:

|  |  |  |
| --- | --- | --- |
| **What** | **By When** | **Who** |
| Understanding the business | 2/20 | All |
| Data cleaning | 2/20 | Jessica |
| Data manipulation (If needed) | 2/20 | Bryton |
| Design database model | 2/23 | Bryton/Rou |
| Implement database | 3/8 | Rou |
| Start on dashboard for visualization | 3/15 | Minju |
| Statistical analysis and comparison | 3/29 | Jessica/Minju |
| Analysis review | 4/5 | All |
| Machine learning implementation | 4/5 | Jessica |
| Evaluate the ML model (How well it is performing) | 4/12 | Bryton |
| Make recommendation on the analysis method | 4/19 | All |
| Finish dashboard | 4/19 | Emma |
| Create a PowerPoint | 5/3 | All |
| Write a paper | 4/26 | All |
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**Questions:**

*Are the Actions ordered to provide the most significant impact as early as possible? Is there a significant benefit to the company if a partial solution is implemented first, and refinements added later?*

**% Chance of Success**  ***Or*** **foot toss**

It is highly likely that we will succeed in providing some meaningful insight into SEL’s analysis techniques, however, the extent to which this insight will benefit SEL is anybody’s guess.

**Possible Major Barriers to Success**:

Communication issues, branch conflicts and poor time management.

**Help Required:**

Constant follow up and guidance by mentor Wende from SEL