INGERSOLL RAND
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EXECUTION EXCELLENCE

2025 STANDARD WORK
FOR IMPACT DAILY
MANAGEMENT (IDM)

October 2024

2025 Standard Work for IMPACT Daily Management

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IRX 2025 Resources Available

Click on any of the links listed below to be directed to each specific area of focus within the IRX Best Practices folder. In addition, a link to the Hour Glass App (shot clock) is provided to be downloaded.

	Area of Focus	Description
1	2025 IRX Overview – PDF	IRX – What, how and why?
2	2025 IDM Standard Work Guide - PDF	The "decoder ring" of IMPACT Daily Management (IDM) for 2025
3	2025 IDM Workbook - XLS	Standard work template (workbook) for IDMs to be used during 2025
4	2025 IDM Assessment Form - XLS	Audit form to be used by IRX Coaches or others (as determined) for assessing current IDM performance versus standard work
5	IRX Annual Execution Calendar	January through December key IRX events for 2025
6	IDM Best Practices	A compilation of what good looks like when it comes to IDMs
7	IDM Short Clips	A series of short videos overviewing and demonstrating what good looks like in various areas of IDMs
8	IRX Simple Problem Solving Process (SPS)	Overview presentation and template to be used when executing SPS
9	Hourglass App	Link to app for shot clock

2025 Standard Work for IMPACT Daily Management

IDM Overview:

The IDM process is a weekly 40 minute daily management process to achieve a 100 day objective (quarterly target). The teams use a standard work process to set objectives for success, prioritize areas of focus, measure results, develop and update IMPACT Plans and countermeasures.

There are four types of IDMs:

1. **Commercial IDMs** – to achieve growth/sales objectives (quarterly budget/forecast). The focus in a Commercial IDM is to get the commercial processes 'in control' via Standard Work (SW). A cross functional group known as the Commercial Board of Directors (CBD) are focused on quarterly objectives and will prioritize areas of focus, measure results, develop and update IMPACT Plans and countermeasures. Success is determined by achieving the 100 day target.

2. **Functional IDMs** – used in situations where there is a clear 100 day improvement objective. Functional IDMS are commonly used for areas such as inventory reduction, OPS improvements, product management and functional areas such as Corporate HR, Finance, Communications and Legal. The focus in a Functional IDM is to get your functional processes 'in control' via Standard Work or successfully complete a short term project. A group of department leads or process owners are focused on quarterly objectives and will prioritize areas of focus, measure results, develop and update IMPACT Plans and countermeasures. Success is determined by achieving the 100 day improvement target or project goal.

3. **Operational / Footprint IDMs** – used in situations where there is a clear 100 day or multi 100 day area of focus (pursuit of long term value stream/lean effectiveness). This type of IDM will be driven by opportunities for improvement presenting themselves regularly during daily +QDIP walks or operations/functional areas of focus (inventory reduction or footprint consolidation). A group of subject matter experts or process owners are focused on quarterly objectives and will prioritize areas of focus, measure results, develop and update IMPACT Plans and countermeasures. Success is determined by achieving the 100 day improvement target or project goal.

4. **Integration Planning and Execution IDMs** – used in two cases: (1) Prior to close of an acquired asset where the situation presents itself to specifically plan for Day 1 readiness. (2) Immediately upon closure of an acquired asset to ensure smooth transition to Ingersoll Rand. Robust standard work exists for these areas of focus – see IRXi Ingersoll Rand Integration Execution

The same Standard Work process and format can be used for Policy Deployment – swimlane reviews can go to 8 minutes and total meeting is targeted to 1 hour

The MOJO Concept

There are 2 roles in the MOJO concept to be utilized in IDM/PD:

1. **M**eeting **O**wner (**MO**)
   - Determines scorecard measurements for success based on improvement bridge and standard work areas of focus for the 100 day cycle
   - Ensures 100 day outcomes are accomplished, results are tied to quarterly objectives
   - Owns scheduling and conducting weekly session
   - Owns Countermeasures and goal attainment
   - Achieves and confirms outcomes – at the end of the quarterly cycle, did the IDM add value/were the objectives achieved?

2. **J**oyful **O**bserver (**JO**)
   - Makes sure the team is conforming to SW
   - Identifies opportunities for improvement and provides feedback to MO and S/L Owners
   - Designated Timekeeper
   - Celebrate accomplishments
   - Documents Follow Ups
   - Gauges Energy/Engagement Level and encourages participation and involvement from all IDM attendees
   - Owns or delegates weekly Meeting Scorecard outcomes
   - Outcomes – At the end of the cycle, did the IDM add value/were the objectives achieved?

IDM Quarterly/Annual Calendar

IDMs cycles will be 13 weeks long with pre-defined cycle dates for 2025:
   - Q1 - Week 1: January 6, Week 13: March 31
   - Q2 - Week 1: April 7, Week 13: June 30
   - Q3 - Week 1: July 7, Week 13: September 29
   - Q4 - Week 1: October 6, Week 13: December 29

Alternative dates for cycle dates for 2025*:
   - Q1 - Week 1: January 13, Week 13: April 7
   - Q2 - Week 1: April 14, Week 13: July 7
   - Q3 - Week 1: July 14, Week 13: October 6
   - Q4 - Week 1: October 13, Week 13: January 5

IRX Coaching Network

Appointed coaches from each Segment/P&L constitute the IDM Coaching Network. This network allows for full coverage of IDMs across the organization as well as having central points of contact for template distribution, communication of process changes and launch of new IDMs while also providing regular coaching feedback, conducting IDM audits and identifying IDMs in need of help.

2025 IRX Coaching Network Members

- CSS NA: Sarah Meehan, Jeff Jensen & Chelsey Wortham
- PFT NA: Sarah Meehan, Craig Keeling & Jesse Klauser
- CSS EMEIA:
    - Europe: Silky Puri
    - India: Manoj Kumar
    - Middle East & Africa: Preeti Patil
    - Air Treatment: Tiziana Di Clemente
- PFT EMEIA: Susana Nuñez
- ITS APAC: Yufeng Ma
- ITS LAC: Rhina Juliao
- Precision Technologies:
    - Agritech: Anne Neumann
    - ARO: Kerry Braxton-Andrew
    - Gas Handling: Jessica Born, Niall Molloy
    - IR/MP/OB: Tom Golak
    - Milton Roy & YZ: Mony Chowdhury
    - Seepex: Tim Drabiniok
- Life Science Technologies: Rhina Juliao
- Power Tools & Lifting: Sean Fitzgibbons
- Corporate: Rhina Juliao
- IRIX: Elizabeth Newidomy

Best Practices – To be done weekly in the IDM

A. **Follow and Trust The Process**
- Meet weekly with full attendance or "voting" backups
- Kick off every IDM session with scorecard review and what SW we are focused on
- Review Growth Bridge – see page 16.
- Take attendance – limited to Meeting Organizer, Joyful Observer, S/L Owners and "Key" Stakeholders, targeted to maximum 12 (mandatory or delegate who can provide update and vote on any priority discussions) and record in the attendance form
- Briefly remind everyone of the discussion guide and 40 min time limit
- Briefly review and closeout any of the TOP 5 Follow Ups from last week (this should be reviewed and done by the leader beforehand – not live if possible)
- In 4 minutes each, review swimlanes – owner should update everyone of the objective - "our goal is X and we are currently at Y & our priorities are 1, 2 & 3". Briefly cover the exceptions in KPIs and IMPACT Plan. Spend more than half of the time on Countermeasures and where help is needed. The Joyful Observer notifies each participant when there is 1 minute remaining
- Document the Follow Ups from this week, remember the 2 lists (this week and next week) are capped at 5 total items
- Document where help is needed from outside the room – Senior Leadership or critical function (i.e. IT or HR)
- Complete the Meeting Scorecard – remember this should be your definition of what a good meeting looks like?

B. **Stay in Compliance on the Administrative side**
- Always start and finish on time – no exceptions, 40 minutes max. If during the meeting you decide to "dive in" on an issue you can do so and should make up the time as required or cut a few topics out – always conclude the meeting with Follow Ups for next week, Where You Need Help and Meeting Scorecard to complete the process.
- IDM Workbooks must be stored and updated directly in their respective IDM folder within the IRX SharePoint Site. Make sure all documents are updated beforehand, and if possible reviewed by the leader and other participants.
- Make sure the Joyful Observer acts as time keeper, keep a running timer and time by S/L. The JO should always remind each speaker when they have 1 minute remaining – using the meeting chat feature or verbally. The use of an on-screen timer is highly recommended to keep the team on track.
- Do not add other topics to the IDM agenda (that totally defeats all the prioritization efforts you have gone through to get to the original 40 minutes) – if you want to have a separate session after the IDM feel free, but conclude the IDM and move to the next topics separately in a another meeting.

Best Practices – To be done weekly in the IDM (cont.):

C.   Leadership – Best Practices

- Always bring energy to the meeting – if you are in person make sure to remove all chairs from the area, this is a true stand-up meeting. Even if you are on the phone, try standing up. You will find you bring much higher energy to the call and are much more engaged.
- Insist on compliance to administrative conformity – regular attendance, lack of prework completed on swimlanes, non participation during actual sessions are not acceptable and should be corrected by IDM Meeting Owner. If long term lack of compliance exist, the IDM participant or S/L owner should be replaced in the process with someone who is willing to participate enthusiastically.
- If appropriate, facilitate brief discussion and encourage questions during all swimlanes reviews
- During the meeting keep track of areas of follow up and have a strong recommendation of the list when you get to this portion of the meeting
- Have and encourage fun!

D. Swimlane Owners – Speaking Discussion Guide

- My Standard Work area of focus is…
- My 100 day objective is…
- I'm in control or out of control to achieving my 100 day objective…
- In my Areas of Measurement, I'm seeing… tied to my in control or out of control statement
- On my IMPACT Plan my key deliverables for last week were X, Y and Z and my key hurdles for next week are A, B and C
- Countermeasures are focused on X, Y, Z (if applicable)
- The place I need some help is…or No help required right now

Swimlane report out should take about 1½-2 minutes to open it up for questions or discussion in the following 2 minutes.

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GM's / Leaders		DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
A	Kickoff / Introduction	Attend whenever possible	Take the leader role from the Meeting Owner	If not clearly stated, Our objective is?	Remain silent
B	Attendance	Remain silent	Take the leader role from the Joyful Observer	Remain silent	Remain silent
C	Follow Ups from Last Week	Inspect for compliance on closing out	Criticize incompletes, coach to good	Why are we not closing these out?	Offer suggestions or best practices on how to address
D	Swimlane Report Outs	Inspect for compliance on KPIs = IMPACT PLAN = Countermeasures Focus on forward-looking planning	Criticize incompletes, coach to good Spend time on looking in the past for explanations of poor results	Is our IMPACT Plan going to get us to success? Do we have the right CMs?	Coaching on what good looks like
E	Follow Ups from This Week	Remain silent	Take the leader role from the leader	Are these the 5 highest priorities?	Coaching on what good looks like
F	We Need Help	Remain silent	Take the leader role from the leader	Are there other places we could use assistance?	Coaching on what good looks like
G	Meeting Scorecard	Participate in scoring	Dominate scoring	Is this team on track to achieve our 100 day objective	Coaching on what good looks like

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	IDM Meeting Owners	DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
A	Kickoff / Introduction	Owners should kick off every IDM session with a reminder of what we are focused on – "our goal is X and we are currently at Y & our priorities are 1, 2 & 3"	Just launch into the process	None	- Always start on time - See "DO" column with lots of energy - RED is ok in IDM, it is an area of opportunity for additional focus.
B	Attendance	Respond when your name is called, otherwise remain silent	Take the leader role from the Joyful Observer	Remain silent	Remain silent
C	Follow Ups from Last Week	Complete quickly and ask that all are ready with an update beforehand. Clear items quickly.	Make this a report out, it is meant to be a quick status update	If not complete, when? Any help needed to complete sooner?	Form completed beforehand and update is robust and crisp. Use red or green always.
D	Swimlane Report Outs	Ensure each lane is updated each week (see pages 19-24 for greater detail here)	Allow for incomplete or not updated data or progress – coach to good	Does anybody have an idea on how to…?	Dynamic and assist in getting "in control" early, frequently providing assistance and help

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IDM Meeting Owners (cont.)		DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
E	Follow Ups from This Week	Be prepared with a recommendation on top 5 or spaces available	Let this be a brainstorm area, but do ask for input to get final priorities. **Have a list greater than 5 items.**	Are we in agreement? Anybody have any higher priorities?	Dynamic area in the IDM completed quickly by leader
F	We Need Help	Make a recommendation and use this regularly. Don't be afraid to go high in the organization.	Leave this blank every week or put in vague request. Be afraid to ask Senior people for assistance.	What do we need help on from someone outside of the room?	Dynamic area in the IDM used regularly
G	Meeting Scorecard	Make strong recommendations in this area	Skip or take lightly	What is the area which needs most focus in the next few weeks?	Help make this a highly dynamic area in the IDM by participating regularly here

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Joyful Observers		DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
A	Kickoff/ Introduction	Remain silent	Take the leader role from the Meeting Owner	Remain silent	Remain silent
B	Attendance	Take role, quickly	Skip anyone, discuss red or green if someone is not there or late	None	Record "real-time" in the meeting on the template. Always use red or green.
C	Follow Up from Last Week	Complete quickly and ask that all are ready with an update beforehand. Clear items quickly.	Make this a report out, it is meant to be a quick status update	If not complete, when? Any help needed to complete sooner?	Form completed beforehand and update is robust and crisp. Always use red or green.
D	Swimlane Report Outs	Inspect for SW conformance Swimlane Banner = KPIs = IMPACT PLAN = Countermeasures Gauge involvement and engagement from all participants	Criticize incompletes	Are we measuring what matters most? Is our IMPACT Plan going to get us to success? Do we have the right CMs?	Coaching on what good looks like

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Joyful Observers (cont.)		DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
E	Follow Ups from This Week	Make strong recommendations in this area	Defer to IDM Meeting Owner every time. **Have a list greater than 5 items.**	Are these the top 5 priorities for this week?	Help make this a highly dynamic area in the IDM by participating regularly here
F	We Need Help	Make strong recommendations in this area	Defer to IDM Meeting Owner every time	Where are some places we could use assistance?	Help make this a highly dynamic area in the IDM by participating regularly here
G	Meeting Scorecard	Always complete or delegate	Skip or take lightly	Was this a good meeting per our scorecard form?	Always leave an area or opportunity for improvement. Use Red or Green, always.

	Swimlane Owners	DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
A	Kickoff / Introduction	Attend or send prepared delegate to report and ability to vote backup	Attend unprepared	None	Show up prepared and with energy
B	Attendance	Respond when your name is called, otherwise remain silent	Take the leader role from the Joyful Observer	Remain silent	Remain silent
C	Follow Up from Last Week	If you have an item on the list, be prepared beforehand to update – open (red) or closed (green) – if still open when will it be closed?	If you have an item on the list, wait until your turn in the IDM session to update where you are and what you will do next	Why aren't we making progress on these items? Do we need additional focus or help on these items?	Close items quickly and create space for additional items
D	Swimlane Report Outs	Always update each week (see page 19-24 for greater detail) This is your work place and should be self explanatory from Swimlane banner to Countermeasures	Leave incomplete, not updated in detail weekly or not adding value and accomplishing the 100 objective and sustained process	Does anyone have any inputs or suggestions? I could use some help here…	Self explanatory & very dynamic and "in control" early, frequently asking for help

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Swimlane Owners (cont.)		DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
E	Follow Ups from This Week	Make strong recommendations in this area	Defer to IDM Meeting Owner every time	Are these the top 5 priorities for this week?	Help make this a highly dynamic area in the IDM by participating regularly here
F	We Need Help	Make strong recommendations in this area	Defer to IDM Meeting Owner every time	Where are some places we could use assistance?	Help make this a highly dynamic area in the IDM by participating regularly here
G	Meeting Scorecard	Make strong recommendations in this area	Defer to IDM Meeting Owner every time	What is the area which needs most focus in the next few weeks?	Help make this a highly dynamic area in the IDM by participating regularly here

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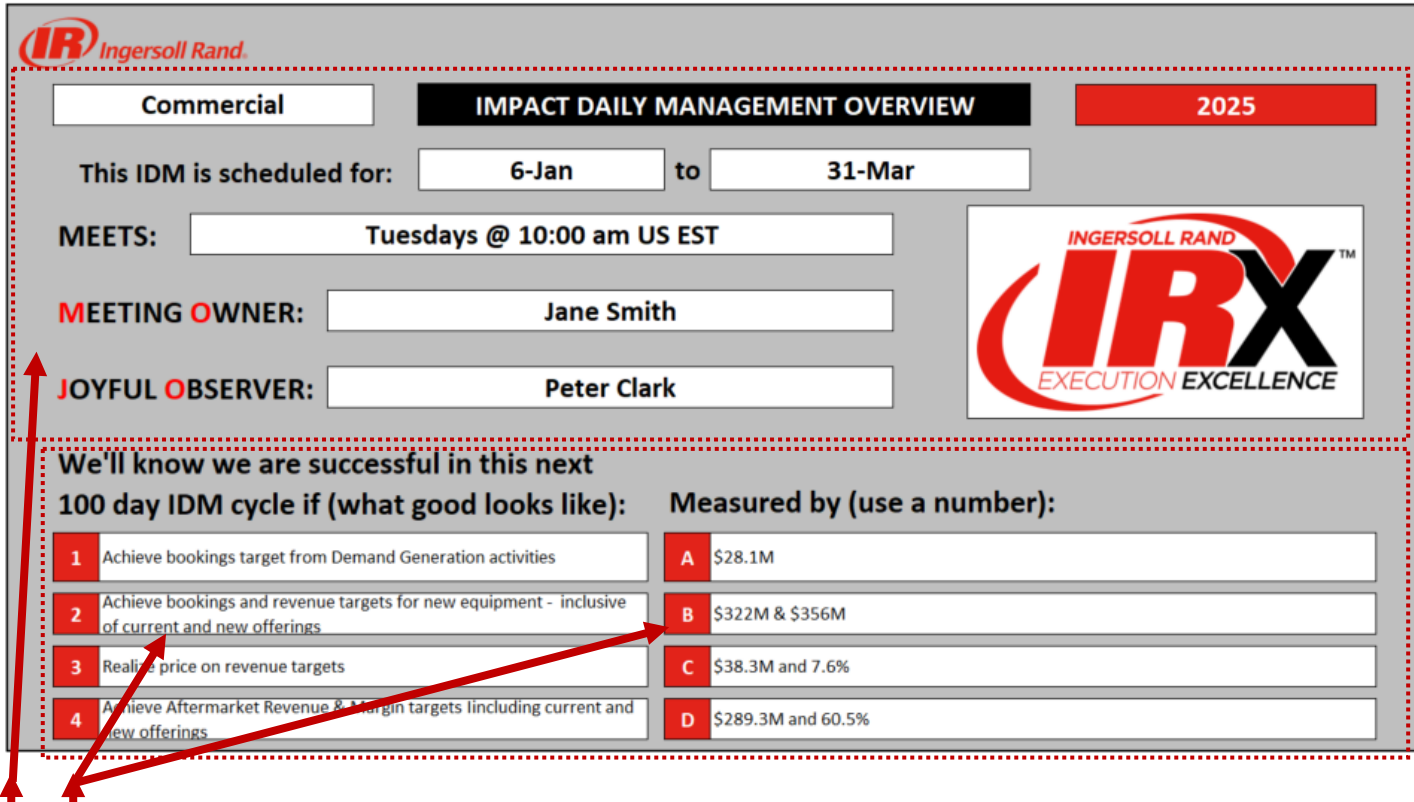| Other Participants	DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
A Kickoff/Introduction	Remain silent	Take the leader role from the Meeting Owner	Remain silent	Remain silent
B Attendance	Respond when your name is called, otherwise remain silent	Take the leader role from the Joyful Observer	Remain silent	Remain silent
C Follow Up from Last Week	If you have an item on the list, be prepared beforehand to update – open (red) or closed (green) – if still open when will it be closed?	If you have an item on the list, wait until you are called on in the IDM session to determine where you are and what you will do next (be prepared)	Why aren't we making progress on these items? Do we need additional focus or help on these items?	Close items quickly and create space for additional items
D Swimlane Report Outs	Inspect for compliance on KPIs = IMPACT PLAN = Countermeasures	Criticize incompletes	Is our IMPACT Plan going to get us to success? Do we have the right CMs?	Highly participative and engaged
E Follow Up from This Week	Make strong recommendations in this area	Defer to IDM Meeting Owner every time	Are these the top 5 priorities for this week?	Help make this a highly dynamic area in the IDM by participating regularly here

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	Other Participants (cont.)	DO	PLEASE DON'T	Questions to ASK	BEST PRACTICES
F	We Need Help	Make strong recommendations in this area	Defer to IDM Meeting Owner every time	Where are some places we could use assistance?	Help make this a highly dynamic area in the IDM by participating regularly here
G	Meeting Scorecard	Make strong recommendations in this area	Defer to IDM Meeting Owner every time	What is the area which needs most focus in the next few weeks?	Help make this a highly dynamic area in the IDM by participating regularly here

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IDM Overview Tab – "How TO"

- To be updated on a quarterly basis or as the opportunity presents itself, recognizing significant change in "what good looks like" or expected outcomes.
- Every box must be completely populated when the first meeting of the cycle is held
- There must be a direct correlation of the IDM objectives listed there and the growth bridge

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Commercial	IMPACT DAILY MANAGEMENT OVERVIEW	2025

This IDM is scheduled for: 6-Jan **to** 31-Mar

MEETS: Tuesdays @ 10:00 am US EST

MEETING OWNER: Jane Smith

JOYFUL OBSERVER: Peter Clark

We'll know we are successful in this next 100 day IDM cycle if (what good looks like):

Measured by (use a number):

1	Achieve bookings target from Demand Generation activities	A	$28.1M
2	Achieve bookings and revenue targets for new equipment - inclusive of current and new offerings	B	$322M & $356M
3	Realize price on revenue targets	C	$38.3M and 7.6%
4	Achieve Aftermarket Revenue & Margin targets lincluding current and new offerings	D	$289.3M and 60.5%

IDM Area of Focus: enter the area of focus for this IDM – business platform or business line, corporate function, special project etc.

IDM Schedule: Start date and end date – corresponding to the actual day of the week when the IDM takes place and must be aligned with either of the two pre-defined cycle dates provided.

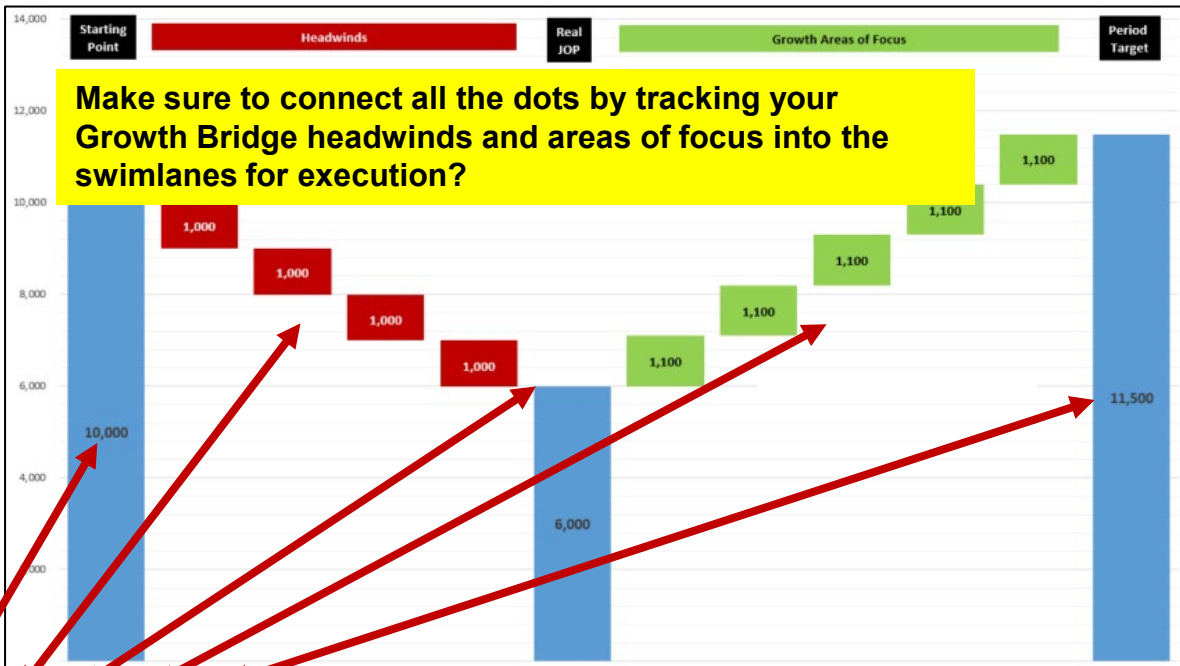**Meets:** Day of the week, time and time zone when the meeting takes place

Meeting Owner: enter the name of the Meeting Owner for the IDM cycle

Joyful Observer: enter the name of the Joyful Observer for the IDM cycle

In the bottom section, enter the overall objectives for this IDM. There must be a direct correlation of these objectives with the growth bridge.

We'll know we are successful in this next 100 day IDM cycle if (what good looks like) and Measured by (in numbers): The first column lists the objectives while the second one includes the measurable portion of the goal ($, % or date).

Growth/Improvement Bridge – "How TO"

Make sure to connect all the dots by tracking your Growth Bridge headwinds and areas of focus into the swimlanes for execution?

OVERVIEW: A Growth/Improvement Bridge is a tool to drive focus (priorities) for the Team. It can be done for the full year, but should also be focused specifically on the current 100 days. Your IDM areas of focus come from the Growth/Improvement Bridge (consensus of headwinds or growth areas of focus) and should drive your swimlanes.

Starting Point: The actual starting point of the Growth Bridge. Results for the same time period in a previous time period or actual results to date. Where are we starting from?

Headwinds: If we don't make the target, what would be the reasons "why"? areas that will hinder your likelihood to achieve the target (no more than 4 allowed = highest areas of impact)

REAL JOP (Jump Off Point): This is the actual starting point. It is the "real" number to execute on to achieve the target. Often times when we miss targets and have executed on all Focus Areas, we have not included what could go wrong. The difference or reasons why?, are usually headwinds.

Growth Areas of Focus: Where do we need to ensure we focus on to make the target? What has to be done? Areas of execution required to achieve the target (no more than 5 allowed = highest areas of impact)

Target: The actual goal or budget for the timeframe for which the Growth Bridge is built – Should be 100 day objective of success for IDM

2025 Standard Work for IMPACT Daily Management

ADA Compliance: In order to be ADA compliant we recommend the use of the following shades of Green and Red from the Standard Colors in the Fill Color drop down selection: Dark Red and Light Green throughout the workbook

Swimlane Banner – "How TO"

Should be updated if focus and definition of success change during the quarter. Every box must be completely populated when the first meeting of the cycle is held.

Sales					
OWNER: John Smith		**LATEST REVISION DATE:**	4-Jan-24	**CURRENT STATUS:**	

Swimlane Name: replace the phrase "Area of Focus ##" in the 2025 IDM template with the name of the swimlane/area of focus for the quarter. Must match the name of the tab and the name on the Discussion Guide.

Owner: overall responsible for the swimlane during the quarter, <u>one</u> person should be appointed as the owner. This individual will report out on a weekly basis.

Latest Revision Date: to be updated every time a change is made to the swimlane

Current Status: to reflect the overall status of the swimlane – red or green. Are we in control or out of control of achieving the 100 Day Objective?

PROCESS TARGETED FOR IMPROVEMENT	Roll out Global Demand Gen standard work to drive proactive marketing and channel campaigns to achieve growth from leads and e-commerce, and deploy & enhance channel standard work 'playbooks' in underpenetrated markets.
100 DAY OBJECTIVE	Grow key product sales funnels from $140.5M to $150M, increase opportunity to order conversion rate from 37.5% to 40%, grow number of connected assets from 3570 to 4875 and harmonize terminology, process, and KPIs for the ITS-AME Sales Management Process by March 31st.
EXTENDED TEAM	Peter Clark, Mary Jones, Frank Lewis

Process Targeted for Improvement: clearly stated process targeted for improvement: new process to be defined, process to be updated or process to be implemented by the end of the 100 day cycle. For example:
- Implementation of Sales Strategy on CARE opportunities for all non-attached assets (4 years or newer)
- Roll out Global Demand Gen standard work to drive proactive marketing and channel campaigns

100 Day Objective: measurable objective to include a number or percent of targeted improvement or date of completion. For example:
- Increase bookings from $1.34 ($289/Acct Mgr) to $2.312 ($386/Acct Mgr)
- Chase orders to meet Q2 budget of $1.3M
- Increase OTD from 72% to 90%, reduce PDBL from $328k to $175k, track 15 new process milestones, and reduce stock outs and PD PO's by 50% (from 80% to 30%)

Extended Team: only team members who share in results of weekly KPIs or own an IMPACT Plan area of focus should be listed

Areas of Measurement – "How TO"

	Area of Measurement	OWNER	Start Point	Target	Leading or Lagging		3-Jan WK 1	10-Jan 2	17-Jan 3	24-Jan 4	31-Jan 5	7-Feb 6
1	>50HP Lub. Rotary Sales Funnel in $M	JS / PC / MJ	140.5	150.0	Leading	TARGET	136.0	136.9	137.8	138.7	139.6	142.0
						ACT	127.6	128.9	131.1	142.1	140.0	146.0
2	Total Bookings in $M	JS / PC / MJ	6	21.7	Lagging	TARGET	1.57	3.58	6.12	8.66	11.20	13.74
						ACT	0.75	3.11	6.11	8.61	11.6	13.8
3	OEM Acquisition Sales Funnel in $M in $ (PD & ER)	MJ	11.2	12.3	Leading	TARGET	11.20	11.3	11.4	11.5	11.6	11.7
						ACT	11.20	11.5	11.4	11.9	12.0	12.1
4	Opportunity to Order Conversion Rate	JS / PC / FL	37.0%	40.0%	Leading	TARGET	37.5%	37.5%	37.5%	38.0%	39.0%	39.5%
						ACT	32%	46%	49%	40%	47.0%	44.5%
5	Connected Assets	All	3570	4875	Leading	TARGET	3655	3740	3841	3942	4043	4144
						ACT	3632	3727	3842	3942	4039	4144

Areas of Measurement: How will you know if you are making progress towards your 100 day objective?

- A good rule of thumb here is no more than **5** total KPIs – 2 outcomes "lagging indicator" and 3 providing "leading indicator" progress on likelihood of accomplishing the goal for the quarter. The lagging KPIs must trace back to the Growth/Improvement Bridge. The Leading KPIs should be activity based and measurable weekly. **Over 5 KPIs is out of control (difficult to countermeasure).**

Owner: clearly identify the person responsible for entering the data for each KPI
Start Point and Target: make sure the jump off points and defined

Leading or Lagging: identify if the metric is a leading or a lagging indicator

- *Lagging* – A Window into the Past: Lagging KPIs measure what has already happened, such as sales numbers and costs. These indicators provide valuable insight into your progress towards your goals and objectives.
- *Leading* – A Glimpse into the Future: Leading KPIs such as the number of inquiries, help predict future sales and give you the ability to plan and make strategic decisions. They are used to predict changes or trends and are forward looking and help to manage the performance of a system or process.

The key difference between Leading and Lagging KPIs is that Leading KPIs indicate where you're likely to go, while Lagging KPIs only measure what you have already achieved

Glide Paths: to be calculated and actual progress to be measured against it on a weekly basis. Fill actual cells Green (black font) when on or above target and Red (white font) when below target.

	3-Jan WK 1	10-Jan 2	17-Jan 3	24-Jan 4	31-Jan 5	7-Feb 6	14-Feb 7
TARGET	136.0	136.9	137.8	138.7	139.6	142.0	142.9
ACT	127.6	128.9	131.1	142.1	140.0	146.0	145.2
TARGET	1.57	3.58	6.12	8.66	11.20	13.74	16.28
ACT	0.75	3.11	6.11	8.61	11.6	13.8	16.3

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IMPACT Plan – "How To"

IMPACT PLAN AREAS OF FOCUS	OWNER	KPI from above?	Plan to IMPACT (Numerical Impact to specific KPI)	3-Jan WK 1	10-Jan 2	17-Jan 3	24-Jan 4	31-Jan 5	7-Feb 6	14-Feb 7	21-Feb 8	28-Feb 9	7-Mar 10
1 Terminology, Process, KPI/Metric Harmonization (Lead>Opportunity>Quote>Order) for Sales SW	JS	1, 4	Drive consistency with legacy business terminology and sales management processes by the end of Q3	Engage Corp Team & IDM	Meet w/ Corp team & Align on Pipeline Metrics	Work with technical team - time & budget quotes to make SFA changes	Participate in Corp sessions - KPI's - definitions & ability to measure across businesses	Business case for SFA changes to NA leadership - consistent measurement	KPI Review & confirmation all channels	Share TDP Program Details with AIRD Team	Multi-business KPI Review - Corporate Team	Schedule for KPI changes communicated	
2 Sales Funnel Growth A	MJ	1, 3, 4	Drive increased opportunities in Key Product Segments to grow key product sales funnels from $140.5M to $155M	Bi-weekly report out of additional email contacts - drives lead growth. Update All reporting for KPIs. All reports that break down opps by type have to	Bi-weekly reporting of May Pay Day accounts - drives new account penetration	Add MA Discussion % to NA A3, Sales Mdi & KPI's Adds coverage aspect to MA's in new world. Complete Business case to add hours/last service date/last	Create "leading from home" training fro ASL's focus on maintaining confidence during pandemic & not quoting too quickly	Deliver "leading from home" training for ASL's.	Finalize Update account classification in SFA (OF/GL/LI) - effective for September release	Finalize ALP updates focused on enhancement of tool (links, new events)	Deploy ALP refresh training & Value proposition to NA AM's	Deploy new Account classification to NA AM;s	Value Proposition Training
3 Sales Funnel Growth B	FL	1, 3, 4	Drive product potentials via weekly pursuit of key growth segments, social networking & distributor engagement to grow key product sales funnels from $140.5M to $155M	Managers meeting on IDM S.F. growth Q3	Attend each S.F. and speak jointly w/S.M. on plans to help grow funnel	Drive metrics into Managers IDM for Q3.	Special focus on California for current projects vs. similar market size.	Attend each S.F. and listen for progress - noting help where needed	IR Sales Excellence training agenda review w/ TSM's	Launch invites via TSM's for Distribution Sales Training - Brian Hadley	Pricing Project & Stocking Strategy - Communicate Status	Review Q3 TDP's with Each Manager by channel - look for growth potential	Hold Manager/TSM meeting with each channel to review growth progress

Area of Focus: For all IMPACT Plans pick the 5 areas (no more than 7) which you want to focus on in the cycle to accomplish your swimlane objective. The areas of focus should be the highest priorities.

For Which KPI from Above?: Identify the KPI(s) impacted by this specific area of focus. An area of focus must be linked to at least one KPI. It can also impact more than one KPI.

Planned IMPACT: Based on what and when you are going to complete your areas of focus, what type of IMPACT do you need to accomplish the overall goal? This column should always be completed with a $, # or date. You need to know if you are achieving the desired IMPACT by individual action and area of focus. This will allow you to more easily countermeasure – "We thought we were going to get X but we actually got Y and now based on what we have learned we are going to…"

Weekly Activities: Add detail and granularity to the plan by listing critical to success activities and specific deliverables. Avoid listing repetitive and generic tasks. At all times, have 4-5 weeks of key milestones or deliverables for each area of focus. Status: Fill cells Green (black font) when completed and getting the desired results and Red (white font) when behind IMPACT or date missed. Blanks (future weeks). Actions completed after estimated due date must remain red in its original week. Completed tasks could be added to current week when completed and refer to the original deliverable to allow for traceability. Fill actual cells Green (black font) or Red (white font).

3-Jan WK 1	10-Jan 2	17-Jan 3	24-Jan 4	31-Jan 5	7-Feb 6	14-Feb 7	21-Feb 8
Engage Corp Team & IDM	Meet w/ Corp team & Align on Pipeline Metrics	Work with technical team - time & budget quotes to make SFA changes	Participate in Corp sessions - KPI's - definitions & ability to measure across businesses	Business case for SFA changes to NA leadership - consistent measurement	KPI Review & confirmation all channels	Share TDP Program Details with AIRD Team	Multi-business KPI Review - Corporate Team
Managers meeting on IDM - S.F. growth Q3	Attend each S.F. and speak jointly w/S.M. on plans to help grow funnel	Drive metrics into Managers IDM for Q3.	Special focus on California for current projects vs. similar market size.	Attend each S.F. and listen for progress - noting help where needed	IR Sales Excellence training agenda review w/ TSM's	Launch invites via TSM's for Distribution Sales Training - Brian Hadley	Pricing Project & Stocking Strategy - Communicate Status

Countermeasure Section – "How To"

"If KPI is RED 3 weeks in a row, or RED YTD the issue and CHANGE IN PLAN must be identified below."

	SPECIFIC ISSUE	CHANGE IN PLAN	OWNER	TARGET DATE COMPLETE	SPS	STATUS
1	Number of connected assets not progressing at expected rate. Taking longer than anticipated to formulate action plan for clean execution.	Grouping Demand Gen campaign with Distributor/TSM effort to enable machines that have the connected customer capability on the machine. Hanna/Boynton/Gengenbacher working - target date to launch by end of August. Also launching counter plan for tactical action - direct touches. Attending ICONN connect meetings that TSM's have been setting up and following through on - engagement should start to yield results.	JS	End of Quarter for realistic results	✗	

Specific Issue: Where are we not getting the desired results we had planned for? What needs to be done differently to impact future outcomes? What are you going to do differently to achieve the targets? Think of this as a problem statement: Our problem is we thought we would get X and we are actually getting Y. Or we thought if we did this, then this would happen, but actually…

Change in Plan: Step number 1 is always – Have we done what we said we would do to accomplish the desired output (executed on our IMPACT Plan)? If the answer to this is yes - What happened that felt short of expectations? What surprised us? What did we not originally consider that we should be considering now? After going through this thinking individually or as a team, what are we going to do about it? – What's the best next step?
Should be completed with enough details for everyone to understand how the objective is going to be accomplished – what is going to happen? by who?

Target Date Complete: When will the countermeasure be completed? Enforce appropriate detail on the plan, ownership and completion dates

SPS: Was a **SPS** (Simple Problem Solving) session required to better understand the issue and determine specific actions to countermeasure appropriately?

Status: Have you accomplished what you thought you were going to accomplish by the specific date you targeted? If yes mark this green, if not mark this red and describe what are you going to do about it in an updated IMPACT Plan or countermeasure. If you have not reached the targeted date leave it blank.

Follow Ups Section – "How To"

Between Last Week & Current Week Follow Up Items, list must be capped at 5

FOLLOW UPS FROM THIS WEEK'S IMPACT DAILY MANAGEMENT
DOCUMENTED FOLLOW UPS FROM THIS WEEK'S IDM SESSION

#	SPECIFIC ISSUE	OWNER	PLAN TO ADDRESS	DUE DATE	STATUS
1	Margin Reports	Mary A.	Reach out to Finance teams to get margin reports as we get for India. We have been using BW which will no longer be available so will need another source.	8-Jan-24	
2	Hydrovane deals	John B.	Has the agreed communication gone to distributors ?	8-Jan-24	
3	IR Margins missing	Peter C.	Schedule meeting with IT - need regular reports from Oracle.	8-Jan-24	
4	Std Costs for 2024	Laura D.	Check with Finance teams if guidelines have been distributed	8-Jan-24	
5	Frame 5 DS comms	Daniel E.	Ensure it is circulated by the end of this week	8-Jan-24	

Specific Issue: enter the follow up item topic

Owner: clearly identify owner of the action

Plan to Address: Describe the action that needs to be taken to address the specific issue

Due Date: Completion date for the item. Ideally these items are to be closed in a week.

Status: When initially documented, the status is left blank and is updated on a weekly basis until items are closed. Green if item is completed, red if the item remains open. If items will continue to be worked on for a long period of time they will need to move to a swimlane.

2025 Standard Work for IMPACT Daily Management

When to ask for Help?:

1. When you have an area of focus which requires significant attention and the resources required are not represented in the IDM. For example – Assume you are trying to reduce quotation time and you need some IT support to assist in help route the quotes around for the appropriate approvals.
2. The Team is stuck and needs some input from some senior person – help, assistance or input to move forward. This could include the P&L owner at the regional level or someone in Corporate.

Best Practices:

1. Start & finish on time with 100% (including delegates) attendance
2. Always come prepared with a plan, regardless of function or role in the IDM – "How will I add value today?"
3. Make sure a timer is visible on screen to keep track of time
4. When editing the workbook between IDM sessions, open workbook in browser to allow multiple users to work on the file simultaneously
5. Open workbook in browser during the IDM session to update the workbook in real-time for Attendance, Follow Ups, We Need Help and Meeting Scorecard
6. Don't be afraid to flex on Areas of Focus and KPIs when appropriate
7. Everyone inspects all swimlanes for quality and common sense
8. Ask for help when you need it
9. Stay focused on closing out the Top 5 Follow Ups weekly
10. Be honest and transparent regarding the Meeting Scorecard form, leaving areas for improvement
11. Start with a blank 2025 IDM template for each 100 day cycle for best workbook hygiene. Avoid using existing workbooks from other ongoing IDMs to create a new IDM workbook as links and macros can exist and could cause issues moving forward.
12. Rotating MO and JO as appropriate to prevent overall IDM fatigue or staleness. Experience shows both roles have been extremely effective developmental tools (the same applies to swimlane ownership)

New IDMs

1. When the need for a new IDM is identified, start with an Improvement/Growth Bridge to frame overall objective(s), critical metrics and expected deliverables. This will also help determine if support is required from the IRX Team for an install event.
2. Through your corresponding IRX Coach, request the creation of a folder in the IRX Execution Excellence Master Site as well as obtain the latest version of the IDM Workbook Template Provide a list of team members that will require access to the newly created IDM folder so that access can be granted
3. Once the weekly cadence for the new IDM is defined, include your corresponding IRX Coach and Rhina Juliao in the recurring meeting invite for visibility and audit purposes

Wrap - Up:

− The critical success factors in all IMPACT Daily Management process effectiveness is leadership, quality of the improvement bridge and effort applied by the Team (especially "swimlane" owners)

− The IMPACT Daily Management process will be value adding if everyone recognizes the importance and value it can add. Participation, effort and preparedness are expected standards and will ensure positive experiences and results for all participants.

− The IMPACT Daily Management process is meant to give you some confidence and momentum in achieving your growth or improvement targets by meeting frequently (weekly) and focusing on the highest priorities in achieving revenue targets or improvement objective. All while developing a new standard of standard work.

− The process is very simple, to some maybe offensively so –
  • What are you focused on to increase the likelihood of hitting your improvement targets?
  • What area of Standard Work are we focused on for improvement?
  • What is the 100 Day definition of success measured in a number, percentage or date?
  • What will you measure to pursue and ensure success while knowing if you are in control or out of control?
  • What areas of impact are you focused on to drive a positive trend in the areas of measurement (over the next seven days and complete 100 day cycle)
  • And, when things change or don't go as expected (+90% likelihood) – what will you change or do differently?

− The real value in the IMPACT Daily Management / Policy Deployment process is forming a plan based on priorities, executing to the best of your ability and countermeasuring based on experience and data to get the prioritized, focused process back on track and, over time, achieving targeted 100 day objectives while establishing new baseline for Standard Work