Effective Use of MIS Reports

DMAEC

Project Charter

Opportunity Statement

The current MIS reporting system produces 415 reports. It is not clear how many of these reports are being actually used by the 1,286 employees. Maintaining these reports costs the bank 900 K every year. Also, it is expensive to create new reports (around 14K per report) when one of the old ones could be utilized.

Business Case

- **Hard Benefits (Level 1): $ 250 K**
  - Avoidance of Report Maintenance and redeployment of IT resources: 200 K
  - Cost Avoidance by avoiding development of 3 reports : 42K
- **Soft Benefits (Level 2):**
  - Improve utilization from 0.1% to 5%

Goal Statement

- Primary Metric: Reduce the number of reports that a global MIS reporting system produces from 415 to 250.
- Secondary Metric: Ensure remaining reports have a utilization rate of 5%.

Project Scope

In Scope : Retirement of unused and underutilized reports in the MIS System.

Out of Scope : Retirement of MIS system and any related analytical screens.

Project Plan

▼ Kick-off ▼ Tollgate Review

	April	May	June	July	Aug	Sep	Oct
Define	4/15	5/15					
Measure			6/14				
Analyze				7/4			
Engineer						9/26	10/08
Control							

Project Team (Names removed to protect privacy)

Project Sponsor:

Project Manager:

Master Black Belt:

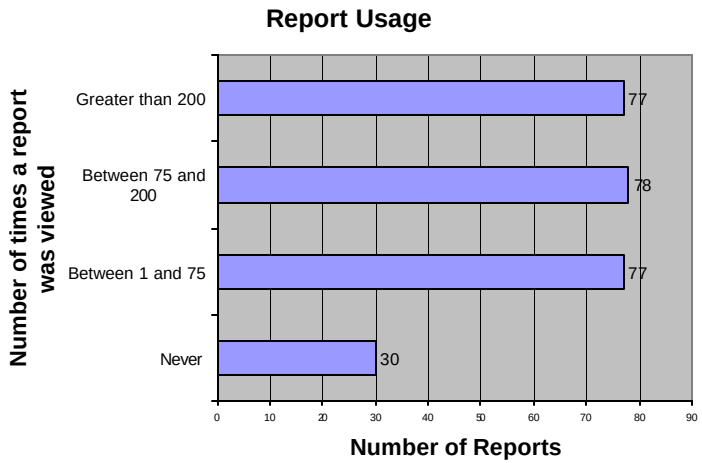
Green Belt: Amit Kaul

Subject Matter Expert:

Working Group:

Measure – Baseline Utilization

PRIMARY METRIC: Usage



SECONDARY METRIC: Utilization

- As a starting point, a baseline for report usage was collected by extracting historical usage data from January 2008 to Apr 2009
- Data collected was enhanced to calculate expected number of views for Daily, Monthly and Yearly reports.

CURRENT PROCESS PERFORMANCE

- Baseline Report Usage : 415
- Goal Report Usage : 250

Areas for Analysis:

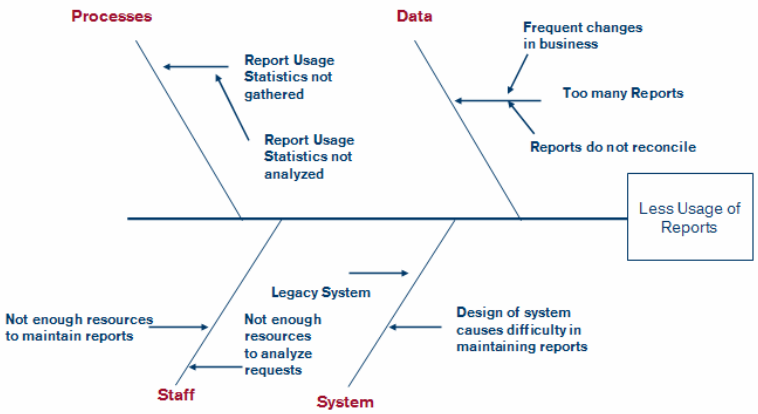
- Total Usage per report.
- Analyze expected number of views per report vs. actual number of views per report.
- Identify suitable utilization threshold for Report.

Analyze - Problem Statement and Validated Root Causes

PROBLEM STATEMENT

- The current MIS reporting system produces 415 reports. It is not clear how many of these reports are being actually used by the 1,286 employees. Maintaining these reports costs the bank 900 K every year. Also, it is expensive to create new reports (around 14K per report) when one of the old ones could be utilized.

POSSIBLE Xs



CRITICAL TO REPORT USAGE

- Factors attributing to underutilization of Reports:
  - Due to inconsistent data, multiple reports are created
  - Difficulty to customize reports in legacy system causing proliferation of extra reports
  - Frequent changes in business causing extra reports to be created be created
  - No process in place to control the creation of reports
  - Report statistics not generated or analyzed

Engineer - Quick Wins & Selected Solutions

QUICK WINS

- Remove 30 reports that were not opened in the last 16 months

POSSIBLE SOLUTIONS

- Processes
  - Create control process to review report usage bi-yearly
  - Implement a review process for creating new report
- Staff
  - Hire more staff to maintain reports
  - Train staff to analyze report requests
- Data
  - Remove underutilized reports by creating a threshold and removing reports that are under the threshold
  - Migrate to a new system that is more flexible

PROPOSED SOLUTIONS

Solution	Rank
Agree on implementing a review process for creating new reports	1
Agree on implementing a bi-yearly control process	2
Agree on that any report that does not meet the 5% utilization threshold should be removed	3
Agree on exception to report removals for Audit	4

VALIDATE SOLUTION

- By agreeing to implementing a review process for new report creation, three reports were not created.
- An extra 136 reports were removed as they were below the threshold utilization.
- The bi-yearly control process will ensure that any underutilized reports will be removed thereby ensuring that average utilization is above 5%.

Control – Implemented Solutions

RESULTS

- The primary goal of this project was to reduce the existing 415 reports to 250. The project achieved this goal by removing 166 reports.
- The change in the report generation process has enabled a cost avoidance of 42K already.
- The project also implemented a control process to ensure that reports are not underutilized. This will ensure that when reports are migrated, there are fewer and more essential reports available for migration.

KEY SUCCESS FACTOR

- A utilization threshold of 5% has helped determine the baseline for report reduction.