

# Katzscan Newsletter

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During one consulting engagement I was curious about the somewhat contentious relationship between two managers in their interpretations of an existing report. I had changed some operational procedures and created a check-and-balance between the two departments. I had informed the managers I was doing this and both believed it was beneficial towards the goal of a more efficient organization. I spoke with each manager individually and then decided to plan a meeting between all three of us. At the meeting both managers discussed how they used the report, and both managers were correct in what they were doing.

As I listened to the managers I noticed that they each called their report something slightly different, and it was just about as subtle as the pronunciation of the word THE, where one pronunciation rhymes with TEA and the other pronunciation rhymes with DUH.

I asked both managers to place their copies of the report on the table, and they looked nearly identical save for one or two columns of data. Being near a computer I accessed the ERP system and found that there were two reports with near identical titles that had slightly different data qualification parameters, meaning that the two reports gathered and reported slightly different information.

Revealing this discovery during the meeting, the three of us had a good little chuckle. We quickly agreed on what the purpose of the report should be, what information -- what data gathering criteria -- the report should use, and I adjusted one version of the report and deleted the other. Everyone was now looking at the same singular report; the relationship between the two managers was instantly improved, as were the overall operations.

I believe it's important for front-line supervisors and managers to be able to access data for analysis and "what if" queries, and to do so without the need to involve their information technology staff (including consultants). In my opinion this is part of what supervisors and managers should be doing: investigating exceptions and identifying opportunities for improvement based on reviewing data from their unique and familiar perspectives.

However, when it comes to the corporate reports that are used to run the organization, these must be well-defined and the information mutually-agreed upon by the supervisors, managers, and executives who are stakeholders in the various reports. These reports should be documented as to the data gathering parameters and formulas used for calculations. Corporate reports should be given names that identify them as such; in fact report naming standards should be a requirement for all organizations.

The failure by organizations to create a uniform set of management reports that are used to make business decisions, identify exceptions, and highlight out-of-bound performance parameters is one of the crucial "disconnected dots" I see my clients suffering from. If you know of a company -- maybe your own -- where there's tension between team members and decision-makers can't quite see eye-to-eye, perhaps this is the cause of

the confusion.

*Norman*

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