Does Your Business Measure Up?

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Does your business measure up?

Sage and Kimble are pleased to provide this white paper entitled “Does your business measure up”.

Both organizations are passionate about helping firms scale.

**Kimble and Sage Live**

Kimble is the first pre-integrated solution with Sage’s flagship accounting solution Sage Live. The solution enables you to streamline how you document, access, and report on the financial health of your business. Sage Live allows you to gain a single, unified, real-time view of your business—including new invoices in accounts receivable, new expenses in accounts payable, and project-based dimensions for accurate reporting. With Kimble you can manage your services pipeline while transforming your project profitability, utilization, forecast accuracy and working capital usage. Expert insights and notifications guide your team to make the right decisions at the right time to enable your business to scale rapidly.

Business leaders are coming to us because they realize that real-time diagnostics and guided analytics are the key levers in rapid expansion. Instant visibility to the health of their business enables them to better plan and control the future.

**About Sage**

Sage is the market leader for integrated accounting, payroll and payment systems, supporting the ambition of the world’s entrepreneurs. Sage began as a small business in the UK 30 years ago and over 13,000 colleagues now support millions of entrepreneurs across 23 countries as they power the global economy. We reinvent and simplify business accounting through brilliant technology, working with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers. And as a FTSE 100 business, we are active in supporting our local communities and invest in making a real difference through the philanthropy of the Sage Foundation.

**About Kimble**

Kimble is the leading Professional Services Automation (PSA) solution. We provide consulting organizations with a best-in-class pre-integrated solution for Sage Live. This best-of-breed combination of applications creates a single view of customer, resourcing, delivery and financial information to provide real-time visibility and control of business performance.
Kimble is overturning the idea that PSA is all about gathering data to assist operations (backward looking). Kimble believes that the real purpose of PSA is to empower people throughout a consulting organisation to make better decisions, decisions that improve business performance.

The Kimble application connects three critical management domains – pipeline, resourcing and delivery – but it connects them with role-specific workflows and dashboards that guide business development, resourcing, project and finance people to take action to sell and deliver more profitable projects and to optimize the back office.

**Introduction**

It’s a truism that what gets measured gets done and what doesn’t get measured doesn’t. But if a small to mid-size business is to scale and create value you have to be measuring the right things – the few things that really make a difference, far too much time is spent on metrics that will not change anything.

Successfully scaling a business is hard - growth is very rare – in a study for RSA in 2014 in the UK less than 4% of businesses make it from small to medium and similarly less than 4 % make it from medium to mid-size – there are natural barriers as complexity grows with more people - management and leadership styles must evolve, structures, process and systems need to be introduced and strategy and its execution must find space despite the operational whirlwind.

![Figure 1: Five principles of performance measurement](image)

*Driving growth and value creation through performance measurement*

If the whirlwind continually wins out, if you're not quite sure what success looks like, if achievement always seems to slip to the right, if all the staff aren't quite all pulling
in the same direction, if reporting is seen as a burden and decision making frustrated by debating the provenance of data then the chances are you are struggling to grow and that your performance measurement approach is broken.

Yet if you can focus on the few things that really matter and make a difference, align your staff and release their discretionary effort, spread accountability throughout the organisation and take real action to improve and follow through with discipline – then you will scale. Performance measurement provides a framework that can deliver this focus, alignment, accountability and execution discipline and drive growth and value creation.

There are no 5 magic things that all businesses should measure - all businesses are different and at different stages of the growth lifecycle, so this webinar looks at how to identify, design, capture, report and act on the key measures that can transform your business.
Is your strategy measurable?

I’m going to assume that you have a strategy to grow the business and create value – this may be written down and have been captured in a plan or it may be in your heads and being followed more loosely.

If the strategy is to progress towards the vision over the next, say, three years, we must have a clear view of that future state desired at that point and be able to bring what it looks like to life – too often by the time word-smithing is over both the vision and strategy are often not measurable – there is a proliferation of actions rather than goals, multi-focus goals, confusion with business as usual (BAU) and a lack of understanding of cause and effect – all wrapped up with “weasel” words which don’t really mean anything. Yet if you can’t measure what that future state looks like, how do you know when you get there and whether or not you are making progress towards it?

It’s not enough to say you are going to be “become the premium provider of your widgets in the regions of the US by 2019 with industry-leading productivity and sustainable profitability” without saying how you define premium, the regions, industry-leading and sustainable and how you are going to measure them and what targets you are going to meet in 2019.

The problem with “weasel” words is that they literally suck the meaning out of the statement and are open to different interpretations – so either lose them or qualify them so the meaning is precise. So if premium is measured by market share and the target is 20% we know what we are trying to achieve.

The key here is expressing the desired outcomes in terms of results – measurable results – profit (ebitda) will be doubled in three years; productivity, measured by average ticket closure time, will improve by 5% per annum, and so on.

Now with a clearer view of what you are aiming at you can start to look at the results that need to be achieved by strategic initiatives to realise this future state.

Mapping results relationships

It’s very important that we understand the relationships between the strategic goals and results – what are the cause and effect – for example, increasing client satisfaction will mean we are more likely to improve profitability – but also where results complement each other and where they are in conflict.

Stacey Barr in her book Practical Performance measurement created a results mapping template which I will briefly illustrate now. By understanding how the

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company results relate to strategic goal results and they relate to process results and they relate to activities – you can explore and test whether the logic of the strategy holds up and focus in on which are the most important results to achieve and therefore justify measurement.

The results map has four concentric circles with the mission/vision in the centre and moving through strategy and process to the outer circle of activities. You can segment the circles into, for example, areas of the business. Each “bubble” represents a performance result and the lines represent cause and effect, companion or conflict relationships.

For what I hope is a simple example I have applied the technique to a personal goal – as a keen triathlete I am striving to be selected in my age group to represent Great Britain by 2017 in the half-ironman event (my mission) – the full results map shows the results I need to achieve across swim, bike, run, transition, wellbeing and race.
management – the segment here concentrates on the results I need to achieve to improve the bike part of the race.

To be selected the strategic goal is to perform well enough in one or more qualifying events – I need to be able to complete a normalised race in around 5 hours 30 minutes to do so – on the bike this means I have to complete that phase in under 2 hours 45 minutes – to do that I have to improve my power/weight ratio (and hence my fitness) – power I can improve by progressively increasing my training load whilst weight loss is caused by running a net calorie deficit by ensuring I eat less than I burnt. I can help to train more by improving my bike technique but also have to be careful that, as anyone who trains a lot knows, you are permanently ravenous somewhat in conflict with managing your daily nutritional intake. The cause and effect, companion and conflicting relationships are clear.

And you can see how you are starting to connect the central goal you wish to achieve with the daily activity you carry out.

**A measurable strategy**

So a prerequisite for performance measurement is that your strategy is measurable – this is not about changing your strategy (although it might help refine it) rather about translating it into measurable terms with an emphasis on the results to be achieved.

Then understanding the relationships between the various results required by the strategy to help ensure potential conflicts are managed and that you can prioritise the most important results to concentrate on and commit to measuring.

Testing the logic also starts to build the story and set up the next stage of the process – establishing a line of sight from strategy to operations – the front line.
Establishing lines of sight

Too often strategy and operations are seen as totally different things – with strategy something executives worry about whilst the staff and managers live in the operational whirlwind and react to the here and now. Yet it is when the two are properly integrated that action can happen and change stick.

**Linking strategy to operations**

I use the yin and yang symbol purposefully in presentations as whilst strategy and operations are often seen as opposites and contrary they are actually complementary, interconnected and interdependent.

Establishing the positive connections between the two are how you bring strategy alive – if the daily work of your staff can link to the desired strategic outcomes and you can explicitly show how an improvement in what they do will improve the desired result then you will get buy-in and behavioral change is possible – success here tends to breed success and the more aligned staff become the bigger the effect you can get.

The results map highlighted the relationships between results – the performance cascade we will now look at will put measures on results and explicitly link them together, connecting operations to strategy – I’ll give two quick examples, one in IT managed services and one in professional services.

**Time to value**

There are two main types of revenue stream in IT managed services – the deployment project and the ongoing delivery of the managed service and these consume pretty much all the direct resource in the business. If a desired strategic result is profit expansion, then improving operations is one fertile area to explore. But how do we get to a measure that can mobilize the staff doing work and make a significant contribution to the strategic result.
A performance cascade starts with the strategic result breaks it down into its component parts and then breaks down the component parts – repeating this process until you get to the "coalface". This creates a line of sight from strategic result to operational measure and at the same time establishes the expected relationship allowing the potential leverage to be evaluated.

In the example on the right the first stage is to break down ebitda into gross contribution and indirect cost and then decompose gross contribution into revenue and costs for the deploy and ongoing service elements.

If we then break down the cost side of the deploy project, we can get to the duration of the project which I've called TIME TO VALUE – literally how long it takes to execute the project.

If we then break down the revenue side of the ongoing service project, we can also get to TIME TO VALUE – literally the point at which the recurring revenues kick in.

Now we have a very interesting measure – bring it forward and you bring recurring revenues into the period – slip it and you slip them off the period – bring it forward and you create more opportunity to deploy more revenues, slip it and you start to impact the amount of deploy revenues you can execute. The linkage up through the
performance cascade allows you to understand the impact of moving time to value on the profitability of the business and I'll return to this later in the webinar.

To give a simple example of how to engage teams around time to value – the clock starts when the client says yes and the first task is negotiating the contract, before project teams are deployed. An IT managed services contract can be complex and its negotiation can take many weeks and often the commercial teams in both parties tend to take a “it will take as long as it takes approach” yet this sets you back almost before you have started. An agreed initiative to “lock the lawyers in a room until they are done” can short circuit the endless crisscross of marked up contract emails and shows how these indirect guys can improve profitability.

**Unbilled days**

Let me give another example of a performance cascade, this time for professional services, and let’s stick with the example of an initiative to improve the strategic result of profitability.

Again starting with the strategic result of EBITDA we break down to gross contribution and indirect costs and then break gross contribution down into revenue and direct costs. Then we break down costs into man-days and labor and then break down man-days into billable, unbilled and non-billable days – UNBILLED DAYS are of real interest here – they can be work that should have been billed thus causing revenue leakage, they can be nugatory work increasing costs for no purpose and they can be “free” days to the client to keep them happy, again increasing costs – in all cases resulting in lower margins and profitability.

If we focus on and capture this measure, we can encourage the consultants and managers to find ways to minimize it. And most importantly it is no good looking at this measure reported for last month, three weeks after the end of the month – that is distance history! Looking at the forecast of unbilled days and then comparing the actuals against the forecast will drive behavior in the right direction.
Figure 4: performance cascade – unbilled days

Linking strategy to the “day job”

Line of sight

So the trick in using performance cascades to create the line of sight between strategy and operations thus aligning both operations and staff to strategy and getting to measures that staff can influence and hence directly influence the desired strategic results.

Using this approach, you can still get lots of measures, so how do we get to the few that really matter?
Measures that really matter

The challenge is that there is a lot of terminology very loosely used when it comes to performance measurement. I prefer to use the term performance measure as the generic class and be specific on different types of measure. Whilst the term Key Performance Indicator is used in very many ways and often just as any measure that it of importance or interest – David Parmenter in his book – Key Performance Indicatorsiii – gets quite specific when defining what is and what isn’t a KPI.

What is a Key Performance Indicator?

Firstly he differentiates between measures looking at the past and those that are measuring the current or the future – the former he call Results Indicators – I like this term as it highlights what most boards and management do most of the time – look at results that have already happened – this is important in your monthly review cycle and you need to understand how the operational performance of the business has translated into financial outcomes but Parmenter stresses that the measures that really make a difference are looking at the current and the future – which he call performance indicators. He then goes on to highlight key results indicators and key performance indicators as the most important measures. Furthermore, he states that of an overall population of measures in a business no more than 10% should be KRIs and no more than 10% should be KPIs – if there are more you are lost in the trees again.

He then goes on to give a list of characteristics of KPIs and which I have highlighted a few here:

- Current and future – you need to be able to influence them, whilst financial measures are mostly results indicators and do not generally mobilize your staff
- Frequently measured – if your measure is reported on once a month you are not driving a change in your business
- Team and/or process based – you need to mobilize your people to improve what they do and how they do it – this is how they get aligned to your strategy and they need to be
- Simple yet powerful – they need to be easily understandable by managers and staff alike and ideally have real leverage on multiple desired strategic results

So let’s return to the two measures we discussed earlier – time to value and unbilled days.
Time to value - again

The most powerful measure here is forecast time to value, looking at both the current and future across the business – the historical view can also inform on how to interpret the forecast view.

It can be measured daily and should be measured at least weekly across your projects as part of the project management activity with a real focus on what actions to take if the forecast weakens against target.

It can be measured in each project but also across each process phase so that initiatives to shorten the process phases can be closely monitored to check for the planned for improvements.

Figure 5: time to value – high leverage potential
A strong candidate for a KPI

It’s a simple measure to understand, expressed in terms that everyone gets. And finally, if you do the mathematics using the performance cascade you can see that a 10% improvement in time to value can deliver a half percent improvement in profitability – strong leverage indeed. Furthermore, shortening time to value also contributes strongly to client satisfaction – clients continually want changes and new features to their managed applications to be deployed very quickly to help drive their businesses.

Time to value is a good candidate as one of those few KPIs.
Unbilled days again

Looking at unbilled days again we are clearly trying to minimize these so

- We have to be looking forward – historical measures are of interest but not something we can do anything about
- It should be measured, forecast, at least weekly and the accuracy of near-term forecasts reviewed with the same frequency
- It is project based – so is clearly team and process focused
- Again easy to understand and everyone gets it – on every timesheet

![Figure 6: un-billed days – impacts multiple key results indicators](image)

A strong candidate for a KPI

And looking at the performance cascade you can easily see how it impacts multiple key strategic results. Service Performance Insight talk about 5 key performance results that you should track – and they are all impacted by unbilled days – project overrun, billable utilization, annual revenue per billable head, project margin and revenue per employee.

Unbilled days is a good candidate as one of those few KPIs.

Measures that really matter

In summary KPIs influence the future, they mobilize the people and they have a real impact on the desired strategic results.
Dashboards that inform

Even businesses that have defined a strong small set of KPIs can lose their way when it comes to how to present and report on these measures – their power can be dissipated very easily with badly designed reports and dashboards – so that managers and staff alike quickly disengage and the promised for improvements never happen.

![Image of a dashboard]

**Figure 7: the majority of dashboard designs are poor**

*An example of how not to design an information dashboard*

I use the above dashboards merely to indicate how easy it is to get carried away with form over function - the quality of dashboards is almost universally poor. The “goto” person when it comes to data visualization and information dashboard design is Stephen Few who has published a number of excellent books on the subject – I would recommend *Information Dashboard Design*\(^v\) as a great starting point.

Today I will talk to signal to noise; try and make clear what we should be trying to communicate and quickly show the power of building in recommended action with both Kimble and Sage Live.
Signal to noise

As an engineer by training I was taught to always highlight the signal and filter the noise – jumping to conclusions based on noise not signal can lead to poor decision making. The noise may be in the measurements but far too often it is self-inflicted in the design of dashboards and reports and the choice of presentation of the measurements.

A great dashboard or performance report should virtually act as the agenda for performance review, guiding the priorities, cause analysis and dialogue about how to respond to performance results – unnecessary clutter and detail detract – the concept of eloquence through simplicity applies here. Similarly, the use of dense and indigestible tables, wacky graphs, dials and gauges which are intended to entertain often unintentionally can result in dangerous misinterpretation.

If a dashboard is designed effectively it will lead you through the strategic priorities of the business and highlight the key results being achieved and the direction shown by the KPIs – all at a glance.

The bullet graph

I’d just like to illustrate one particular presentation of data that Stephen Few, and I, favor – the bullet graph. Unfortunately, this is not available in excel “out of the box” but if you google it you will quickly find guidance on how to create them.

The linear design of a bullet graph allows for several of these graphs to be placed next to one another either vertically or horizontally in a relative small space. This compactness together with the backdrop showing the expected range of performance, the primary measure indicated by the bar and one or more points of comparison indicated by markers in the range communicates the context make this a simple and effective chart. Coupled with a spark-line to show the recent trend and/or forecast this is a very useful tool.
The example here goes back to the triathlon example we discussed earlier – with my power to weight ratio represented by the top bar – the trend in the right direction but a little off where I planned to be – the cause of which is evident 4 bars down – I stopped losing weight!

What, why and now what?

This little mantra of what, why, now what – captured again by Stacey Barr is the essence of what you need to communicate when displaying a measure in a dashboard or a performance report:

- **WHAT** – is performance doing relative to what we want it to do – for example against forecast or budget – rarely against what it was in the same period last year (this is noise) and what direction is it heading?
- **WHY** – is it doing that – you must encourage the decision makers to inquire and learn about how to improve the performance rather than blame someone or something for it
- **NOW WHAT?** – means exploring and deciding on the best way to respond – this may be by providing recommendations on removing root causes or potential solutions
I’m now going to give a quick example of where information given in dashboards is augmented by recommendations of what to do next – in the Kimble and Sage Live.

**Kimble Intelligent Insights**

The example in Kimble uses its “intelligent insights” functionality where business knowledge is embedded in recommendations made available in response to certain measurements.

Looking below at a screenshot of a dashboard for an inflight project (an ERP implementation) – this provides a lot of information to the project manager but also highlights when action needs to be taken through the intelligent insights up on the top right of the dashboard.

Hovering over each “insight” shows an overlay of what the user needs to tackle as a priority. So guiding the user to make the appropriate decision (signal) rather than just providing a ‘noise’.
Clicking on the third of these insights tells you that the project is partially staffed by generic resources and clicking through again takes you to the relevant screen to resolve this issue. This encapsulation of recommended action helps develop managers and staff alike.

![Image of Kimble dashboard](image)

**Figure 9: intelligent insights in Kimble**  
*Information guiding you to action*

**Dashboards that inform**

So dashboards can be very powerful in engaging your managers and staff in responding to performance measurements or they can do the exact opposite. To ensure the former – tell a story related to strategy, ensure you are focusing on the signal and not distracting with the noise and encourage proper thinking about why the signal is as it is and what to do about it.

Everything we have covered to date is, of course, mere preparation. The real power of performance measurement is what you do with the information so the final section of this webinar tackles this – driving action.
Driving action

Too many performance measurement initiatives fail because there is no follow through to respond to the information provided and the wrong behaviors and resultant outcomes continue unabated. Why is this? I would suggest two main reasons – your business is not really engaged and the disciplines of execution are weak. Both are cultural so I will talk to this first and then conclude on two areas of discipline.

Culture

In his book, Transforming Performance Measurement, Dean Spitzer says “measurement may use numbers, but it is not about numbers; it is about perception, understanding and insight” As with many management processes, there are two sides – one technical and theoretical and one soft and people focused – it is this second one that so often intentionally or unintentionally undermines performance measurement. You are not measuring performance for the sake of it, you are doing it to engage the whole business in improving performance to meet the desired strategic outcomes – if the guy at the top does not commit to this, or performance measurement is used to judge people rather than improve performance, or you try to fix symptoms and not causes then you will not get buy-in and performance measurement will be seen as at best a burden on top of everything else your staff have to do and at worst a threat to their security and wellbeing.

The case for performance measurement has to start at the top and the leadership has to commit not just to an implementation project but to the ongoing application and embedding it within the DNA of the business – effective performance measurement creates time and space for better decision making but if the leadership’s actions do not reinforce this every day; the staff will get the message.

Probably the most important cultural aspect here is that performance measurement must not be used to measure people or be used to blame individuals. It has to be used to measure process which you can improve and help people find solutions to the challenges the measurements highlight. There is a great quote form W Edwards Demning that I’ll share with you – “measurement without the opportunity to improve is harassment!”

Finally, the culture has to encourage seeking out and dealing with the causes of what the measures are telling you – too often quickly dealing with the symptom can make things look better for a while but rarely alter the course and maintain that new direction.

The culture also needs to reinforce the disciplines of following through and executing with pace.

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Improving performance

There are many variations on the diagram shown on the right in terms of fundamentally executing an initiative – all around the plan/do/check/act theme. The key message here reflects the key messages in this webinar – you should only be dealing with the few things that really matter and given you have limited resources, when it comes to the problems you choose to solve and the solutions you use to solve them use performance measurement to help you make the right choices.

![Systematic Approach to Improving Performance Diagram]

**Figure 10: Systematic approach to improving performance**

*Always close the loop*

The work to select, design and implement the key performance measures will help you set sensible and realistic targets, understand the areas where you can have most impact and ensure that you go for the highest leverage solutions balancing risk and return appropriately.

Finally, always close the loop – the promised benefits of projects are all too often not realized and even more rarely measured – yet without this feedback loop how do we learn and avoid making the same mistakes going forward.

**Cadence**

The monthly review cycle employed in most businesses is essential to understand past performance; it often has a financial focus and is scheduled once the finance function has produced the monthly management pack - often three or more weeks into the next month. This is not necessarily a very good forum in which to review the performance measures we have been talking about today.
The frequency of review and the timeliness of data need to be matched to the thing you are measuring and working to improve – and it needs to be reviewed with and by the teams executing change as well as in management and board reviews. If review is neither routine nor frequent enough – any initiative can drift – and if the players are not engaged in the review they can also neither contribute to solutions nor hold each other accountable.

So don’t design your review cycle to unintentionally slow down the pace of execution – it needs to amplify it; keeping a high cadence in execution is vitally important.

**Driving action**

In summary, driving action is about bridging the gap to the future – concentrating on the few things that really matter and having the discipline and culture to follow through.
Summary

During the course of this white paper I have laid out the main principles behind establishing a performance measurement framework – starting at the top translating your strategy to be expressed in terms of results, connecting it to operations with the results map and performance cascade, focusing in on the few key measures that really matter, ensuring the way these are communicated is insightful and is a call to action.

The methodology that brings this all together I call business blueprinting with the initial assessment phase followed by implementation in the baseline and blueprinting phases and leading to bridging as the business strives to achieve the desired strategic outcomes.

![Figure 11: business blueprinting](image)

Figure 11: business blueprinting

A performance measurement framework for small to mid-size businesses

I hope this white paper has made you think about what performance measurement can do for your organization and if there are three things I hope you will take away from the session they would be:

1. **Start with a measurable strategy** – translate your strategy into results
2. **Focus forward** – that’s where the few measures that really matter are
3. **Take action** – the dashboard is a call to action
Supporting information

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About the Author

Paul is an experienced and successful CFO/COO now leading a new consulting business, aQetas, to drive growth and value creation in small to mid-size businesses (SMB) through performance measurement. Paul is working with professional services firms to apply business blueprinting – a performance measurement framework, designed specifically for SMBs, with rapid deployment and immediate results. Paul was CFO and COO of Attenda Ltd, an IT Managed Services company, over 15 years from start up, multiple funding rounds, successful M&A and exit to circa £45m turnover, 300 staff and a top 20 best companies to work for (in the UK) ranking. Previously Paul was UK COO of marchFIRST, a North American strategy, marketing and technology business and prior to that started, grew and exited a professional services business serving the space industry in the 90’s.