

Guidelines for an efficient Performance Management processes

These guidelines are not absolute necessities for doing performance management. However our experience shows that if they are not followed the process is slow, fails frequently, is expensive in terms of the number of staff needed and prone to error, inconsistencies and omissions.

1. **Do** automate the repetitive tasks.

- Benefits: Reduces support costs by removing the need for manual intervention
Fixed formats and data location increases reliability
Standardised processing removes inconsistencies and permits comparisons between results from different dates
- Drawbacks: Needs a basic level of skill to automate the tasks.
Difficult to access GUI based applications (see *don't's*, later).
Have to consider these “background” tasks when changes are made.

2. **Do** differentiate data collection from data presentation

- Benefits: “divide and conquer” approach simplifies each step.
Packages that are good at one aspect (e.g. collection) are not necessarily good at others - we can use the best available for each job.
Permits making presentations that are appropriate for different audiences rather than a “one-size-fits-all” approach.
Allows for incremental changes to one step or another without needing a big-bang upgrade.
Can collect from multiple sources with different collection tools and produce a consistent reporting format.
- Drawbacks: Collection and presentation tools may not talk each other’s language.
People skilled at collection may not be so good at presentation, or vice-versa.

3. **Do** distinguish between retrospective and real-time requirements

- Benefits: Can give a quick (“lite”) view of key indicators that change rapidly
Different groups interested for different reasons (e.g. fault analysis vs. long-term planning)
- Drawbacks: needs careful choice of real-time indicators
Can lead to snap (hair-trigger) judgements when a long view is more appropriate

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4. **Don't** transfer data via email
This is unreliable and subject to delays. It requires dedicated email accounts or special rules to be maintained and limits the quantity of data. Also email requires PCs are left logged on to receive the email and people are needed to extract and manage the data. All of these drawbacks make it harder than it needs to be to automate the data collection process.
 5. **Don't** use proprietary or binary data formats.
These formats tie data analysis to specific tools. In the case of graphical formats these tools are often limited to manual analysis techniques. Data should be held as text (possibly CSV) or database records that are flexible enough to be input into whichever analysis tool is deemed most suitable
 6. **Don't** restrict access to data.
All log files or other sources of capacity data (including database data) must be readable by the user accounts used by the capacity management team. These accounts are non-privileged to prevent the possibility of accidental actions. Any confidential information can be restricted by the use of ACLs, and the output of the analysis treated accordingly.
 7. **Don't** change things (get it right first time)
Once a source of data has been made available, the location and format of that data should not be changed. If new fields must be added, make them backwards with what already exists. If files simply must be moved, retain symbolic links to the old location.
 8. **Don't** use tools that require user interaction
This is a corollary of the first "Do". Manual intervention is expensive, limited to business hours and prone to error. People's time is better spent doing high-value work that requires judgment and experience.