Reporting Strategy

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Why does the Food Business create reports?

- Food Standards
- Customer Requirement
- Legislation

Reports for Compliance

- Customer Complaints
- Product Non-Conformance
- CAPA
- Management Review
- Trending

} Compliance needed

- BRC: “Clear communication and reporting channels shall be in place to report on and monitor compliance with the Standard.”
- SQF: “When completing an annual review of the SQF System, documents which should be considered include any document that might highlight deficiencies in the system, such as, customer complaint records, corrective action reports, internal and external audit reports and deviations from process control reports, etc.”

In addition, Reports can drive Improvement

- Level 1: Basic reporting to meet Legislation
- Level 2: Higher level reporting to meet certifications
- Level 3: Reporting that drives improvement

Most common types of reports:

- Analysis
  - ❖ Ad-hoc reports that investigate
- Monitoring/Control
  - ❖ Reports that control work flows and monitor processes
- Prediction
  - ❖ Crystal ball into the future using previous trends
- Dashboard
  - ❖ High level reports for senior level VPs and Managers

Approaches to a cohesive reporting environment

Where do I start?!

Examine your goals at each level of the business:

At the Top Level

At the Manager Level

At the Operator Level

Top Level:

- What KPIs are required at a compliance level?
  - These are mandatory
- What indicators will improve quality?
- What data will help the company grow?
- Quick visual to see everything is on track

Manager/Analyst Level:

- What reports are needed to drive the KIs above?
- What do I need to monitor my employees?
- What reports are needed to make sure work is not missed?

Operator/Worker Level:

- What reports are needed to accomplish tasks?
- How is work prioritized?
- What data is critical for building ALL of the above?
  - ❖ THIS is where data is collected - critical

Top Down Approach:

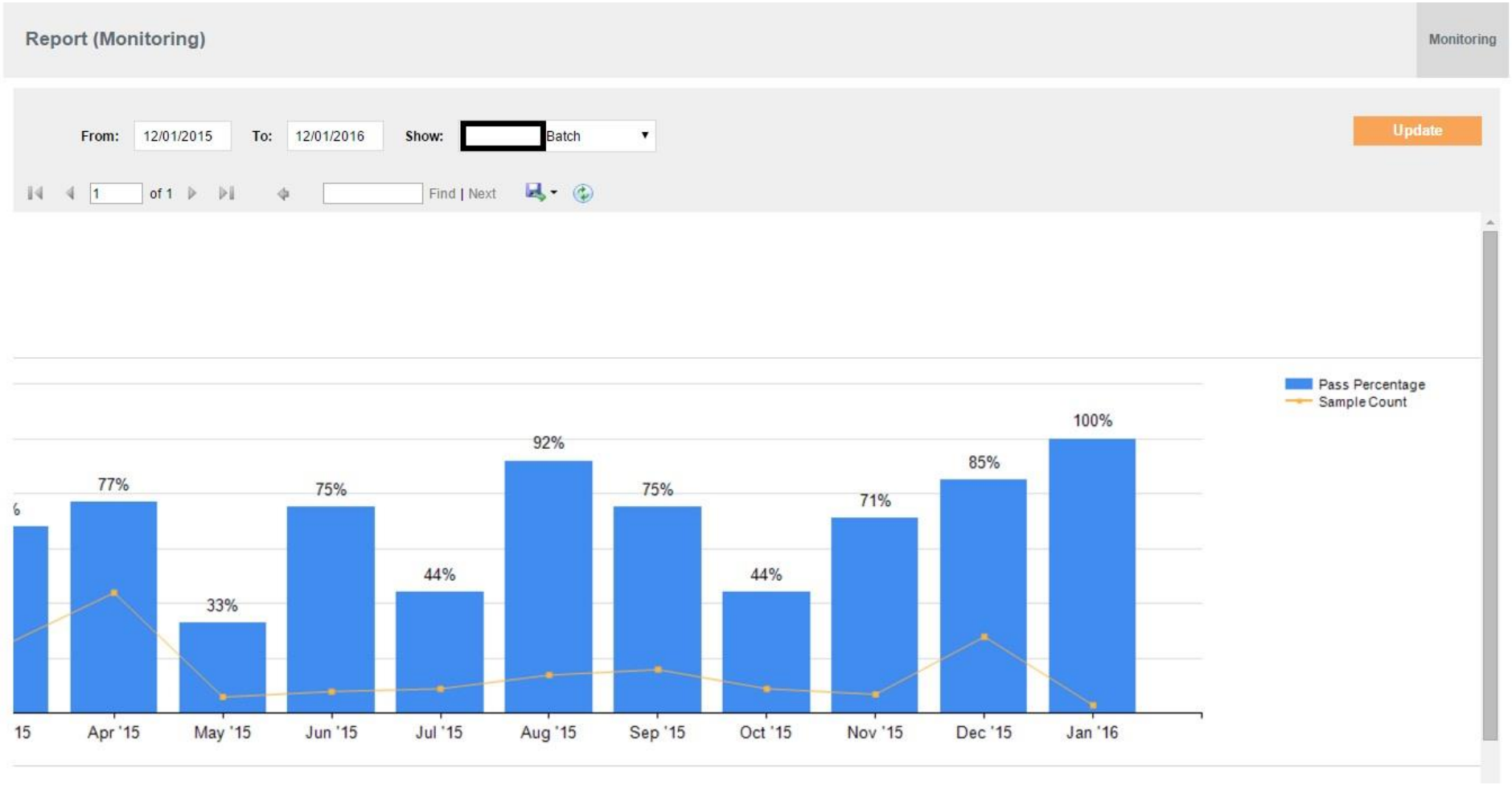
- Examine at the top level what is important for your Quality objectives.
- Use Analysis reporting to answer questions
- SAVE YOUR QUERIES! – you'll need them later

Workshop example:

Banana Pudding

- Last year ABC produced 36,000 lbs of banana pudding. How many failed monitoring tests? How many recalls? Why? (5-10 min)

Monitoring – Pass Rate by Test



Nonconformance – Number Per Type

Report (Nonconformance)

Nonconforma

From: 12/01/2015 To: 12/01/2016 Show: All Nonconformances

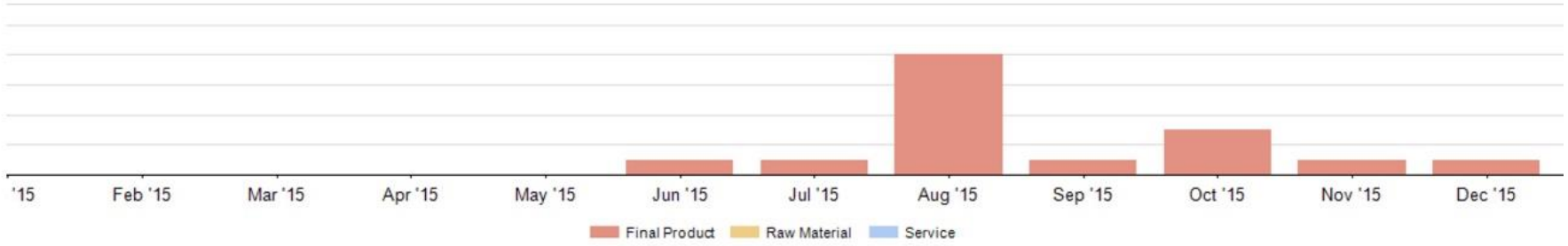
Update

1 of 1 Find | Next

nconformances (All Nonconformances)

[redacted]

12 Jan 2015 - 12 Jan 2016



			Mar '15	Apr '15	May '15	Jun '15	Jul '15	Aug '15	Sep '15	Oct '15	Nov '15	Dec
Nonconformance Types												
Final Product	-	-	-	-	-	1	1	8	1	3	1	1
Raw Material	-	-	-	-	-	-	-	-	-	-	-	-
Service	-	-	-	-	-	-	-	-	-	-	-	-
Total	-	-	-	-	-	1	1	8	1	3	1	1

Use Analysis Results to:

- Establish measurable KIs
  - Make your targets/goals slightly better than your current average OR
  - Make your targets the top month of the last year
  - Tie incentives to these goals and leave them unchanged for a year – let people gain rewards of meeting goals

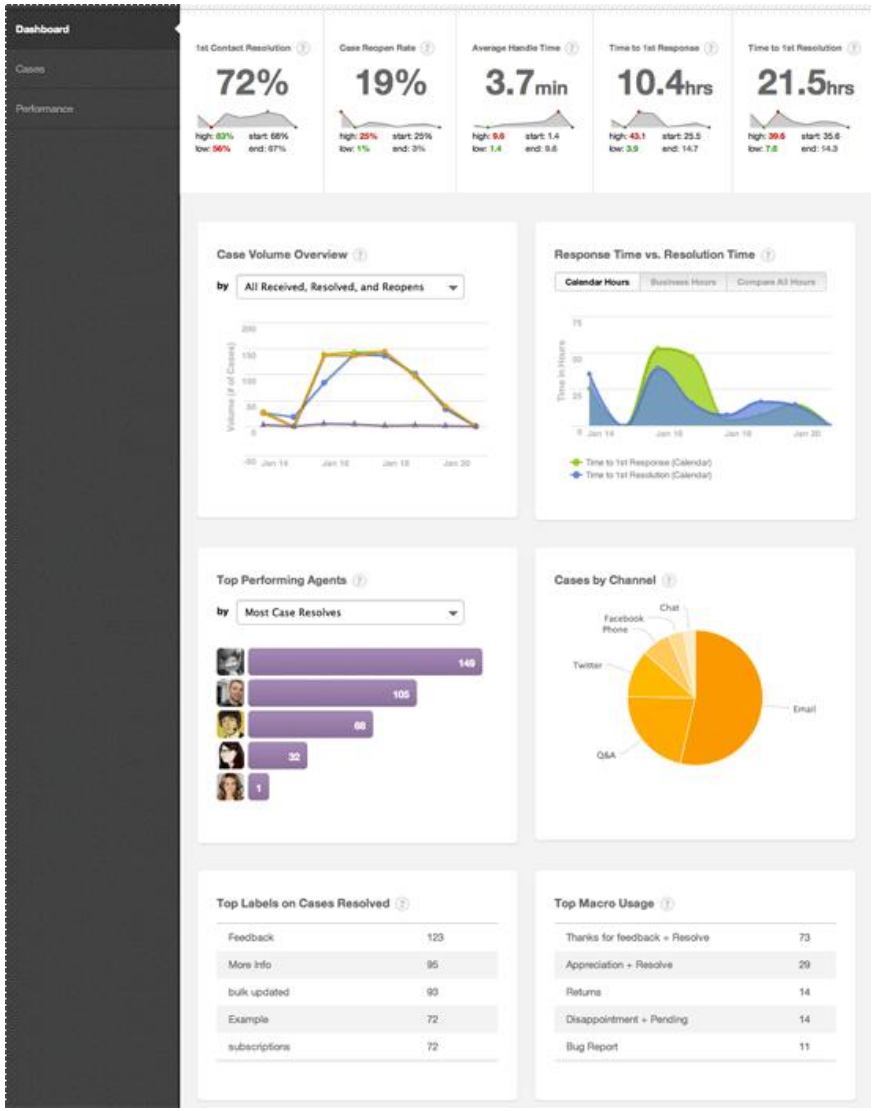
Use Analysis Results to:

- Create a mock-up of your top-level dashboard report
  - Keep numbers simple
  - Don’t overwhelm with too many indicators for one process
  - Keep in mind how the underlying data will flow up to these results
  - One page

Workshop example:

Build/see examples of a mock dashboard report

- Use Banana Pudding analysis to build
- Examine analysis reports and canned Safefood 360 reports



Monitoring/Control Reports

- Next level down from KIs – these explain and drive the goals
- Digs into the reasons for the numbers: Who, What When, and Where so that you can do the Why
- Create or use reports that use the same underlying criteria as KIs

Monitoring/Control Reports

- Create reports that show patterns and when the quality falls outside of those patterns.
- Create reports to make sure work is not being missed; Monitoring reports
- The bulk of reporting happens at this level

DON’T keep old reporting just because it’s always been done that way. If it isn’t aligned to the company goals, throw it out and start over.

Workshop example:

Create a Monitoring Report based on a KI

- How does a manager keep track of banana pudding quality on a daily basis?
- How Safefood 360 Activities monitor this

Event	Time	Person	Stage	Result
QA Check	7:30	Bob	Started	Not Complete
Pre-Op Checks	10/1/15	Jen	Number Completed	20/22
…				

Control Reporting

ABC Food Company Inc

Dashboard | HACCP | Management | PRP Control | Monitoring | Master

Main Dashboard

Summary | My Updates | My Actions (41) | My Alerts | My Calendar

Actions per Module

HACCP	1	Glass & Plastic Control	-
Complaints	7	Pest Control	-
Corrective Action	28	Medical Screening	-
Auditing	10	Traceability	-
Management Review	17	Supplier Control	35
Nonconformance	-	Training	-
Recall / Withdrawal	-	Microbiological Control	-
Quality Management	1	Monitoring	11
Calibration	1	Receiving	3
Cleaning	26	Documents	24
Maintenance	5	Batching	3
Code of Practice	-	Business Process	6
Contamination Control	-	Discussion	-

Maintaining Good Data

- Data is collected at the Operator or Analyst level
- Bad data in = bad data out (poor reporting)

Tips for maintaining Good Data

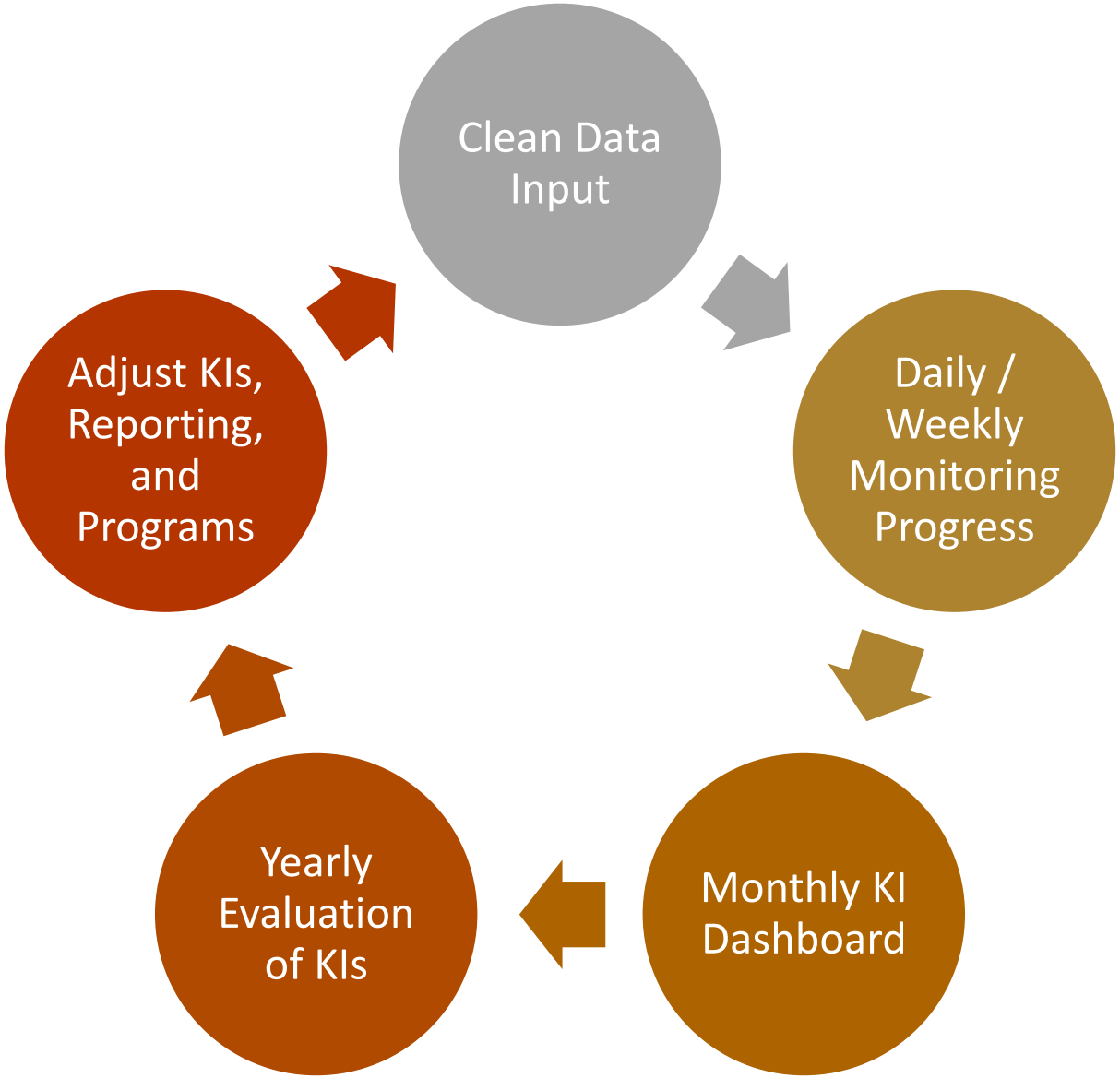
- Make it easy to input data
  - Include all the right measures/items needed
- No Duplicates of the same item
  - “Avery Scale :: 1256” and “Scale 1256”
- Lock down edit rights to Managers
- Make forms user friendly

Match Workflows to Reports

- Make it clear which actions contribute to which goals
- Include procedures for how to correctly accomplish tasks
- Double check that there is a Safefood 360 program for each KI
- Importance of consistent criteria – Doc Controlled?

The Importance Maintaining Consistent Criteria

- Why doesn’t this report match that report?!
- Entire organization working from the same data
- Document Controlled Criteria?


Clean Data Input
Daily / Weekly Monitoring Progress
Monthly KI Dashboard
Yearly Evaluation of KIs
Adjust KIs, Reporting, and Programs