

IDA (INFORMATION, DECISION, ACTION)

Most companies place too much emphasis on results (looking backward) and too little emphasis on the factors that drive results: Information (the basis for effective decisions), Decision (making effective decisions), and Action (transforming decisions to results).

OVERVIEW

What is IDA?

IDA is one of the easiest and most effective ways to improve results in almost anything you do. How? Rather than spending time trying to manage results, which are by their very nature rooted in the past, IDA emphasizes the three factors that drive results:

Factor	Description
Information	Information is the foundation and starting point of IDA. Excellent information (i.e., accurate, relevant, and easy-to-understand) is a precondition for effective decision making.
Decision	Decision is the pivot between Information and Action. It is the moment in time when Information is reviewed and a course of Action is decided. Decision is amplified through GREAT MEETINGS [†] and aligned across the business through STRUCTURED REVIEW [†] .
Action	Action is where theoretical possibilities are transformed into tangible progress; where decisions are transformed into results.

Why Use IDA?

IDA is simple enough to be understood by all employees and broad enough to serve as a framework for forwarding the goals of the business. By establishing behaviors that optimize the inputs (Information, Decision, and Action), the outputs (Results) will take care of themselves:

- Generate accurate and relevant data that is understood by all stakeholders (**Information**)
- Establish standardized processes aligned across the business for making high-quality, timely, and effective decisions (**Decision**)
- Apply decisions quickly and consistently to create tangible progress (**Action**)

IDA Balance

Like a chain, IDA is only as strong as its weakest link. All three factors (Information, Decision, and Action) must be present and in balance to achieve optimal results. In fact, IDA can be expressed as an equation (much like **OEE**[†]):



IDA can be expressed as an equation, which recognizes that all three factors must be present and in balance to achieve optimal results. If any factor is missing or suboptimal it is very difficult to achieve good results.

A Simple IDA Example

Imagine you are a pilot and it's your job to safely fly passengers from Chicago to London. In each of the following three scenarios there is an IDA problem that will prevent you from meeting your objective:

- The gauges are inaccurate or broken (**Information** problem)
- The gauges are accurate but you don't use them (**Decision** problem)
- The gauges are accurate and you look at them; but you don't make any adjustments to the flight controls (**Action** problem)

In other words, all three factors (Information, Decision, and Action) are necessary in order to achieve a good result.

Results Versus Objectives

It is interesting to think about the difference between results and objectives from the perspective of IDA.

In the IDA model, **results** take care of themselves. Instead of obsessing about outputs (Results), the emphasis is on the inputs (Information, Decision, and Action) that lead to great results.

On the other hand, **objectives** are forward-looking and as such inform IDA. Specifically, given a set of objectives, work backwards to determine an optimal set of Information, Decision, and Actions. Applying IDA will reinforce the behaviors necessary to deliver the desired objectives.

BENEFITS

In the **short term**, IDA is a simple framework for training employees to improve results by leveraging Information, Decision, and Actions.

In the **long term**, IDA helps to achieve optimal results by ensuring all three factors (Information x Decision x Action) are present and balanced.

ROLES

IDA involves the following roles:

Role	Description
Manager	<ul style="list-style-type: none"> • Uses rolled-up information at a site/department level. • Plans with a scope of months to years. • Most actions are to improve.
Supervisor	<ul style="list-style-type: none"> • Uses summarized information at a shift/line level. • Plans with a scope of days to weeks. • Most actions are to sustain or improve.
Operator	<ul style="list-style-type: none"> • Uses detailed and granular information at a local level. • Plans with a scope of hours to days. • Most actions are to stabilize, prepare, or fix.

Note: IDA was influenced by pioneering work from OptimumFX, who are UK-based thought leaders and experts on manufacturing improvement.

KEY INSIGHTS

Apply IDA Across Your Business

Every level of your business can benefit from IDA (i.e., using high-quality information to drive effective actions). The scope and nature of each factor changes as it is applied to different levels, as shown below.

Level	Information	Decision	Action
Strategic	Broad and varied information, carefully formatted to save time. Often trended and aggregated.	Periodic reviews that assess trends and develop new large-scale initiatives.	Longer-term actions that reinforce vision, manage change, and dramatically improve the business.
Tactical	Mixed information that crosses levels and provides early warnings of potential problems.	Regular reviews that audit and improve existing processes.	Medium-term actions that address escalated issues and generate proactive improvements.
Operational	Granular real-time information that encourages proactive responses to changing conditions.	Frequent reviews to identify incremental course change adjustments.	Shorter-term actions to fix problems, prepare for challenges and “win the day”.

Evaluate Your IDA Balance

As described earlier, optimal results come from balancing Information, Decision, and Action. For a quick health-check on the effectiveness of your IDA practices, apply the following OEE-based IDA audits:

- IDA Audit: OEE Information
- IDA Audit: OEE Decision
- IDA Audit: OEE Action

Tips on Information

Prefer Quality Over Quantity

It's relatively easy to capture information, but much harder to ensure that captured information is accurate and actionable. As a result, many companies capture reams of information, much of which is not used or useful. Instead, measure only what you need to make effective decisions now. Audit and improve accuracy. Eliminate everything else.

Get it Right at the Source

The majority of manufacturing information comes directly from the factory floor. Put processes in place to ensure that data is accurately collected and automate data capture wherever possible.

Tips on Decision

Run Great Meetings

The key to effective decisions are **GREAT MEETINGS**[†]. Great meetings are standardized, positive, energetic, action-oriented, idea-focused, and forward-focused. Define what great meetings look like for your organization, then train and coach teams to sustain this standard.

Align Across Levels

There is an art to performing actions in a congruent way across a business. A highly effective tool for this is **STRUCTURED REVIEW**[†], which aligns meetings across a business in a way that coordinates actions and sets clear scope boundaries (avoiding duplication of work).

STRATEGIC	Annual Vision
	Monthly Review
TACTICAL	Weekly Improvement Meeting
	Daily Production Meeting
OPERATIONAL	Shift Handover
	4 Hr Short Interval Control
	Regular Operator Checks



Regularly scheduled meetings are the perfect place to consistently apply Decision across your business. Standardize them through **STRUCTURED REVIEW**[†].

Tips on Action

Use the Best Tool for the Job

There are many manufacturing improvement tools available through Lean Manufacturing, Theory of Constraints, Six Sigma, etc. Pick the tool that's most appropriate based on the available Information.

Get it Done

Once an action has been identified, complete it fully or escalate it to a higher level. Prefer small and frequent actions in the spirit of **AGILE**[†].

LEVEL AND DIFFICULTY

The Level is Foundation. IDA can dramatically improve results by focusing on the factors that truly influence those results.

The Difficulty is Easy. The concepts of IDA are straightforward and easy to explain at any level of the business.

RATE YOURSELF

How good is your site at IDA? Answer ten simple questions to see how close you are to a model implementation.

Question	✓
1. Are all employees trained on IDA?	
2. Is Information accurate, relevant, and easy-to-understand?	
3. Is Information consistently utilized by all employees?	
4. Is quality of Information preferred over quantity of Information?	
5. Are Decision meetings used to transform Information into Actions?	
6. Are Actions assigned to individuals and verified for completion?	
7. Are Information, Decision, and Action well-balanced?	
8. Has the weakest link in the IDA chain been identified?	
9. Are inputs (IDA) emphasized over outputs (Results)?	
10. Are objectives tied back to Information, Decision, and Actions?	

[†]This topic is also available as part of the **XL Improvement Framework**.

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