# Step Two: Identify the Current State

## Gathering Data

Next, identify how things currently look. This involves gathering data from as many sources as possible, such as statistics, reports, interviews with stakeholders, surveys, etc. Focus on quantitative measures that are equivalent to the desired future state. For example, if your future state focuses on response time to customer inquiries via e-mail, the data that you gather for the current state should focus on that as well.

Here are some questions that you can use to identify the current state.

* What is happening that makes us want to improve this situation?
* What metrics can we gather about this situation?
* What steps take place in this process?

You will need to access several data sets, including performance data (who does what, when they do it, and how much they do). These numbers are often captured in annual or periodic performance reviews, and may be called key performance indicators (KPI’s). You may also be able to gather team statistics and electronic reporting (such as phone call volume and duration, clicks on a keyboard, number of steps taken to complete a task, etc.).

Sample Project: Improve Response Times to Customer Inquiries

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| --- | --- | --- | --- |
| **Future State** | **Current State** | **Gap** | **Action Plan** |
| Customer e-mail inquiries will be replied to within 24 hours on average | Average response time is 32 hours |  |  |
| Customer telephone inquiries will be answered within 5 minutes on average | Average hold time is 8 minutes |  |  |