

# LEANOhio

## IMPLEMENTATIONS PLANS

SIMPLER. FASTER. BETTER. LESS COSTLY.

# New Year's Resolutions

- Only 8% of Americans are successful in achieving New Years Resolutions
- 25% don't make it past the first week
- People who write down their specific resolutions are 10x more likely to attain their goals



# Top Ten Resolutions

1. Spend more time with family and friends
2. Get in shape
3. Quit smoking
4. Enjoy life more
5. Quit drinking
6. Get out of debt
7. Learn something new
8. Help others
9. Get organized
- 10. Become a Lean Six Sigma Green Belt**

# Implementation Plans

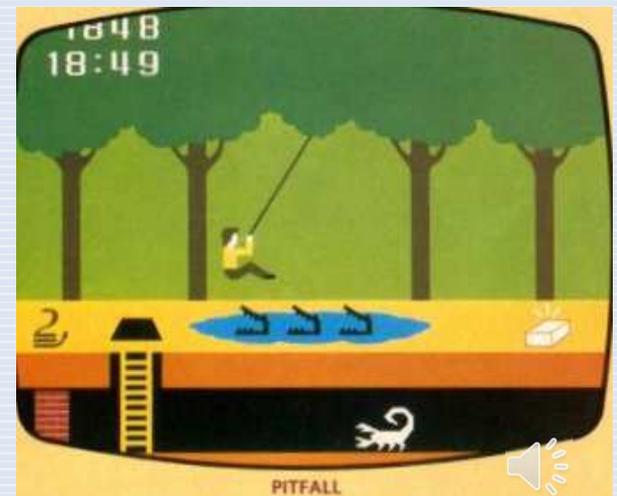
- Objectives
  - Crystal clear, building block for implementation plan
- Tasks
  - Steps that must be accomplished and who is responsible
  - Accountability
- Time allocation
  - Each task must have time frame for completion
  - Aggressive, but reasonable
- Progress
  - Monitor each task

# Implementation Plans

- Who needs to know?
- What do they need to know?
- When do they need to know?
- Communicate with stakeholders

# Implementation Plans (Pitfalls)

- Having a plan simply for plans sake
- Writing the plan and putting it on the shelf
- Unwillingness or inability to change
- Not having the right people involved
- Unrealistic goals or lack of resources
- Poor leadership / sponsor
- No accountability and follow through



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# Implementation Plans

- Action Registers
- Timeline Tree
- Gantt Chart



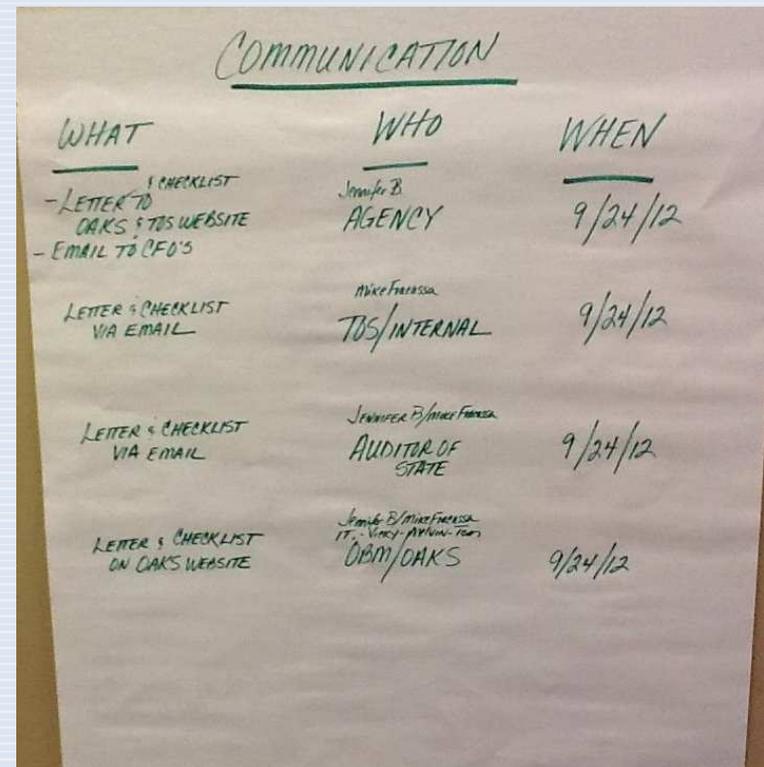
# Action Registers

What	Who	When

- **What** action or objective needs to be accomplished
- **Who** will take the lead in seeing that the team accomplishes the objective
- **When** a specific date for beginning the objective and completing the objective

# Action Register (Samples)

- Training
- Communications
- Policy/Procedures
- Information Technology
- Forms/Checklists
- Etc.



A handwritten action register on a piece of paper titled "COMMUNICATION". The register is organized into three columns: "WHAT", "WHO", and "WHEN".

<u>WHAT</u>	<u>WHO</u>	<u>WHEN</u>
<sup>1 CHECKLIST</sup> - LETTER TO OAKS & TOS WEBSITE - EMAIL TO CFO'S	Jennifer B. AGENCY	9/24/12
LETTER & CHECKLIST VIA EMAIL	Nike Francisca TOS/INTERNAL	9/24/12
LETTER & CHECKLIST VIA EMAIL	Jennifer B./Nike Francisca AUDITOR OF STATE	9/24/12
LETTER & CHECKLIST ON OAKS WEBSITE	Jennifer B./Nike Francisca IT, VENDOR, ADMIN, TRAIN OEM/OAKS	9/24/12

# Training Plan

What	Who	When
Create training course outline	Adam	4/8/2013
Complete “draft” instructor and participant manual	Blake	4/25/2013
Finalize manual and additional training materials	Blake	5/6/2013
Print training materials and upload to website	Jillian	5/13/2013
Train HR and Facilities	Adam	6/10/2013
Train Planning and Finance	Adam	6/17/2013
Conduct “makeup” training sessions	Waymond	6/24/2013
Review feedback and schedule future training sessions	Jillian	7/7/2013

# Action Registers

Communications/Training

Who	What	When
1. K. Team	Senior Staff Roll-out Plan Tape	FRI 5/5
2. Communications	Article + Tape	Mon. 5/9
3. Field Ops Adm + members of team as needed	High Level overview Process - Plan - Training - Implement	1 wk → 2 wk
4. Training Team Training Dept + Team Members + Policy Tech	Team in depth plan Roll out Steps - MED/BWC Communications	above
5. Training Team (if needed) BWC/MED/BWC	Same as above	# >
6. + See Tammie M. Training and group	Communicate the Process + Plan	>
7. Brian/legal	"	1 -
8. IC	"	

I.J. ACTION REGISTRY

Who	What	When
Irene/IT JAWET	online (ig "APP FOR THAT")	7/1/12
Irene/DebK	Instant msg	7/1/12
Vic Doyle Matt Laparo	macros in V3	7/1/12
Tony Larraceio Jill	MEDD - revisions - electronic	7/1/12 8/1/13
Bill Brown	dual Monitors	7/1/12
Vic Doyle	V3 Corr Updates	7/1/12 (V2) 12/31/12 (V3)
Kim Mander	online Die Process	7/1/12
Deb K	326 includes Sx Pending	7/1/12
Pete/DebK	FAST TRACK EXAM	7/1/12

Communications/Training

What	Who	When
Report Out	G. Calcara	1 week
New Process Map. (Visio) .pdf	G. Calcara	now/1 day
Current Map	N. Trombley	1 week
Report Out Doc	R. Martynski	by report out
Marketing Plan	T. Walker	2 weeks
Training Plan + Training	internal { R. Wiley K. Clouse/M. Green D. Hennessy	8 wks
	external { L. Jones T. Walker	6 wks
	guidelines "any other docs" for customer	

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# “Phased” Implementation

- Assumes a complex and/or resource demanding solution that must be “phased” in
- Implementation plan may include two or more phases in which plan resource demands are spread over time
- Immediate, Intermediate, and Future Plan
- A separate action register should be developed for each phase

# “Phased” Implementation

phase

1

The next 30 days

- Revise form “A”
- Update procedure XYZ

phase

2

30 to 90 Days

- Revise and implement new policy
- Conduct training on new policy and methods

phase

3

6 to 12 Months

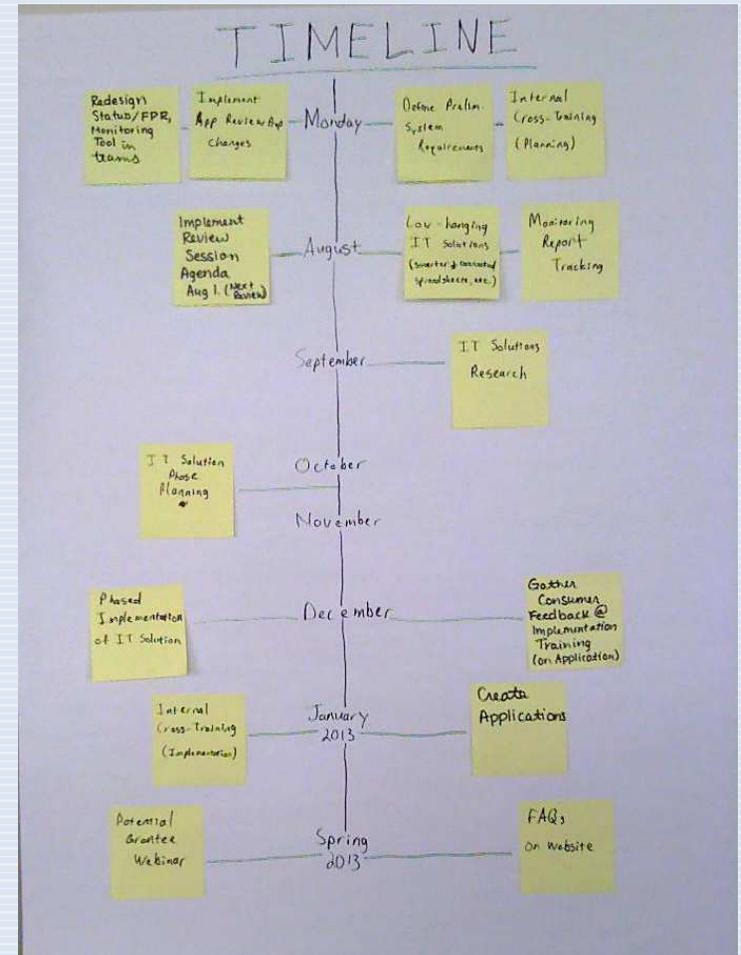
- IT to begin purchase procedures
- IT to purchase new iPads
- Training on new iPads

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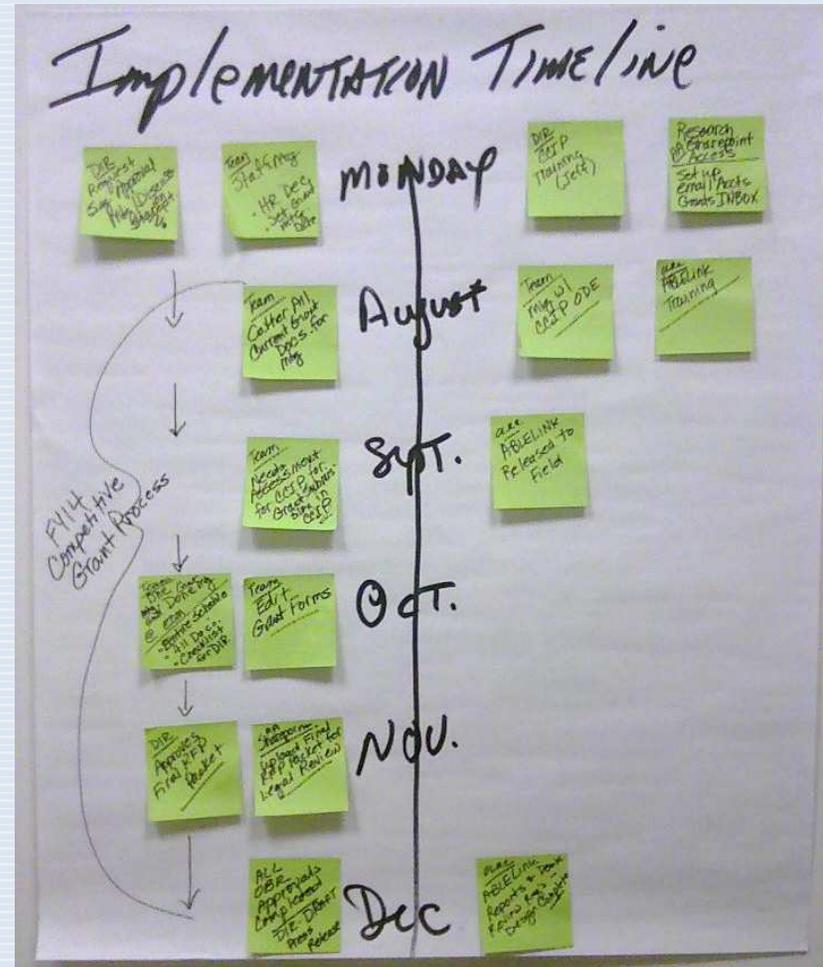
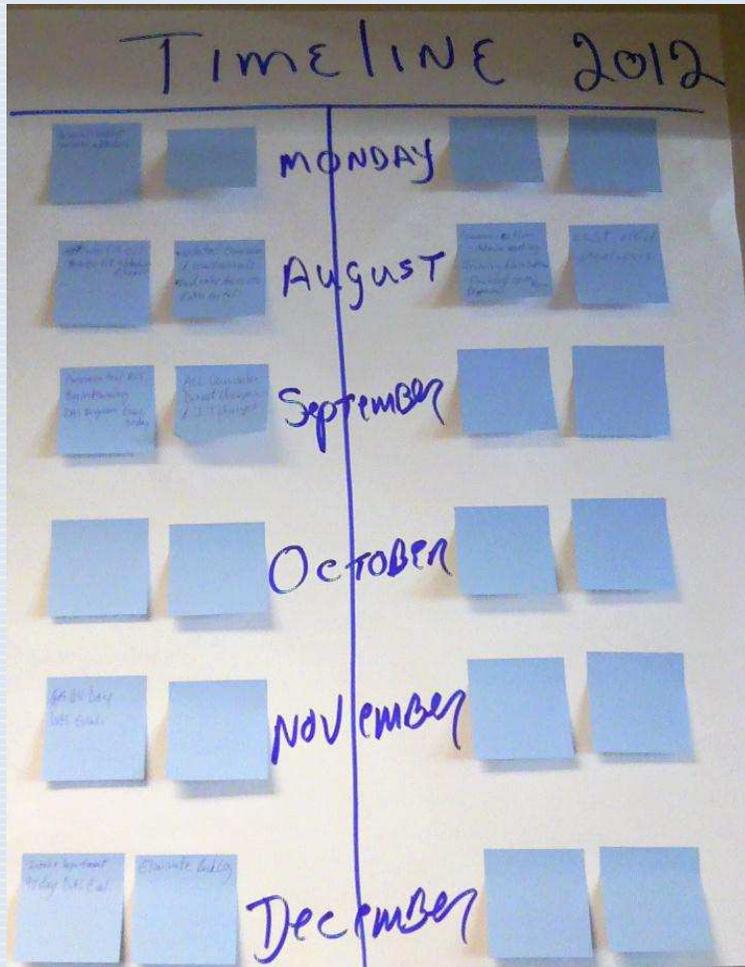
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# Timeline Tree

- High level
- Central axis (schedule)
- Activities on post-it notes with dates of implementation



# Timeline Tree

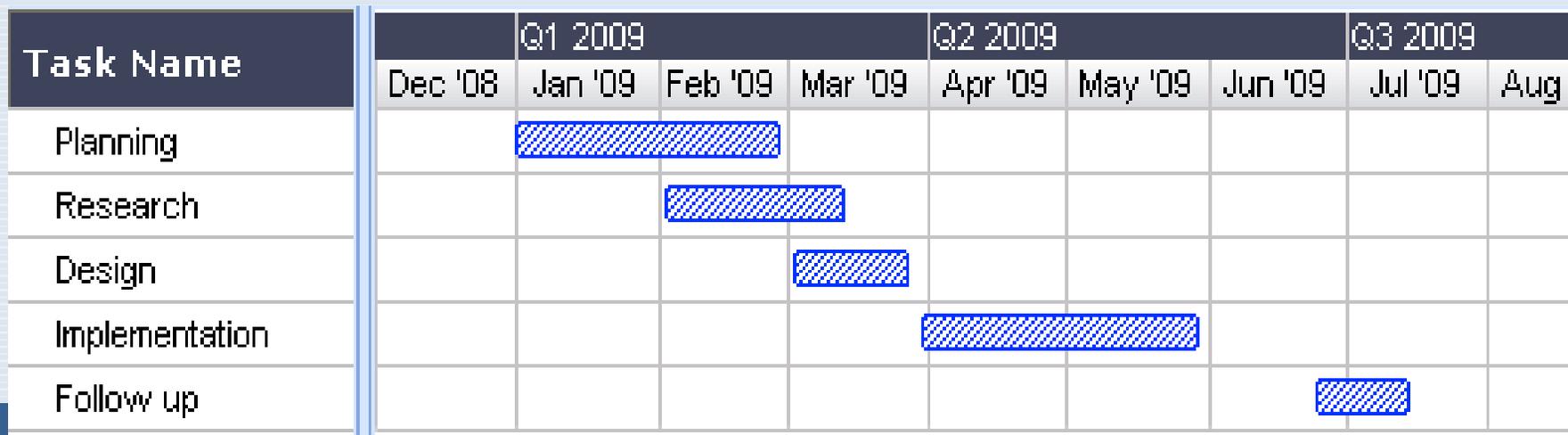


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# Gantt Chart

- Clear illustration of project status – what has to be done (activities) and when (schedule)
  - Left of the chart is a list of all activities/tasks
  - Top of chart represents a suitable timescale (days, weeks or months)

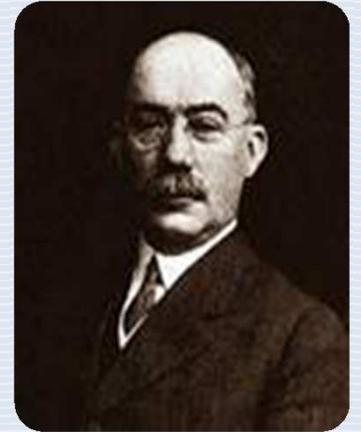


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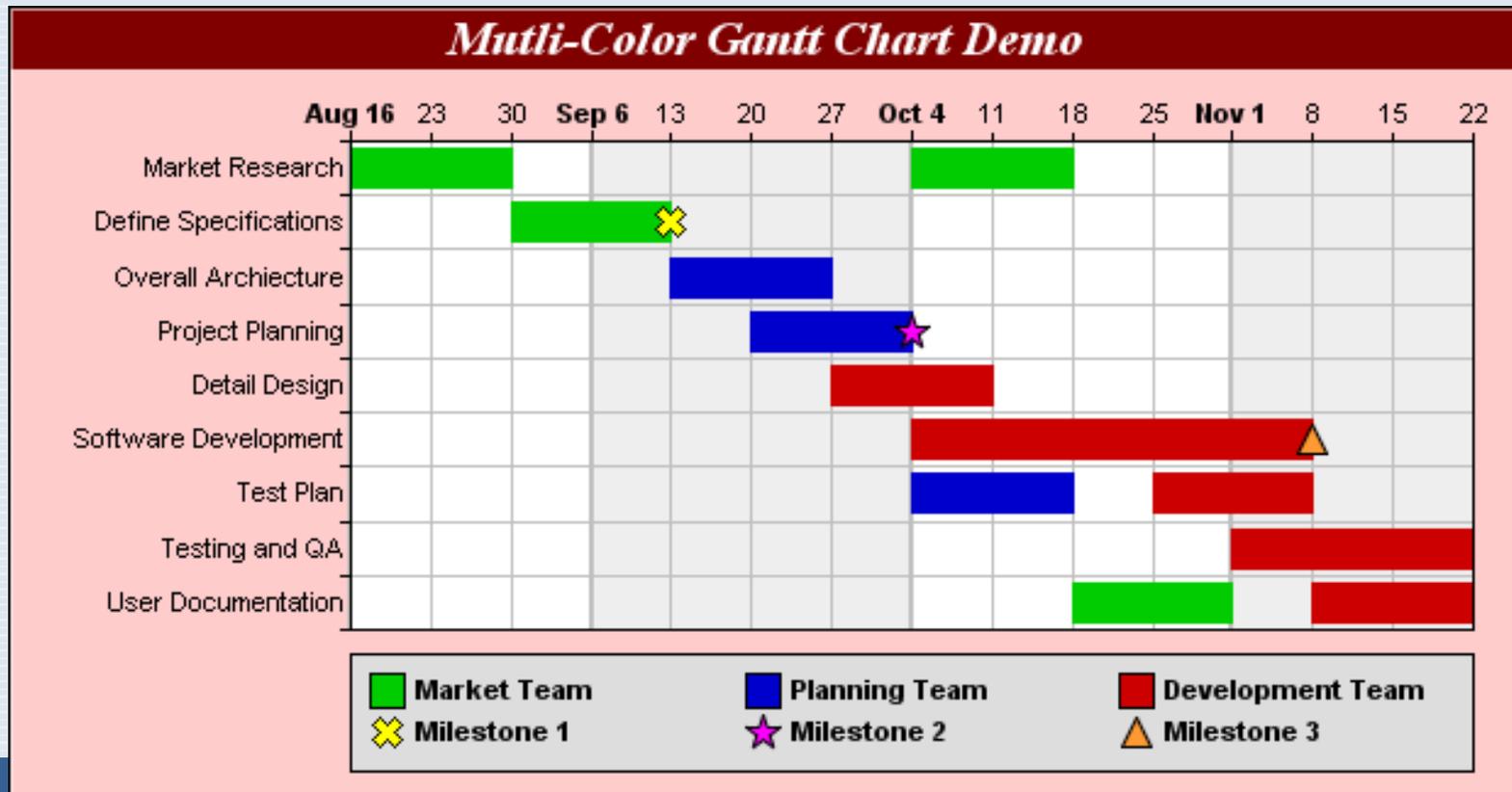
# Gantt Chart

- What are the various activities
- When each activity begins and ends
- How long each activity is scheduled to last
- Where activities overlap with other activities and by how much
- Resource allocation
- The start and end date of the entire project



# Gantt Chart

- Microsoft Project

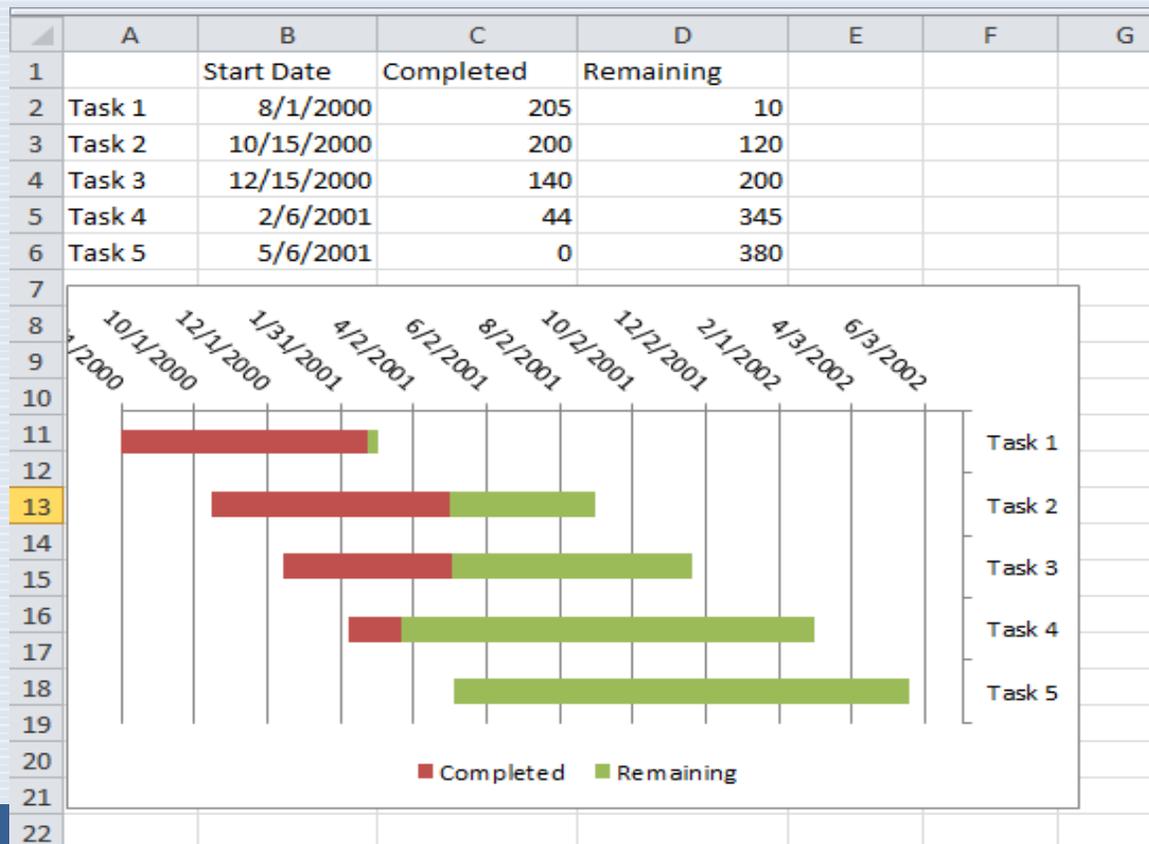


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# Gantt Chart

- Microsoft Excel



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# No Plan?

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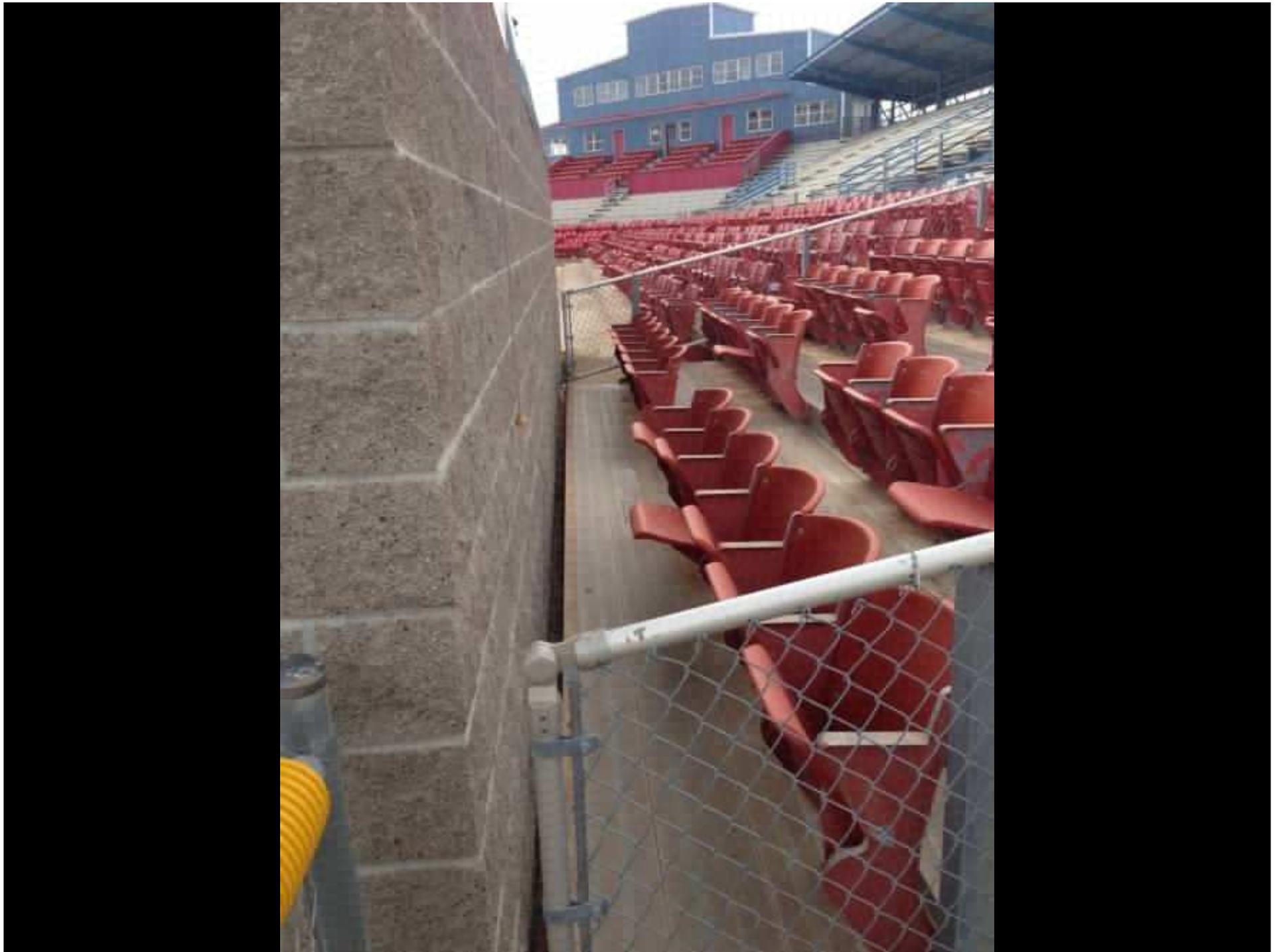


NOT AN  
EXIT

← EXIT

















# Follow-Up Meetings

- 30 Days
- 60 Days
- 90 Days
- 1 Year



# Follow-Up Meetings

- Conduct a 2<sup>nd</sup> customer satisfaction survey 6-9 months after the event to identify progress and needs
- Update dashboard (visual management)
- Promote recognition opportunities for successful teams

# Follow-Up Agenda

- General progress update
- Review action registers
- Roadblocks?
- Assistance needed?
- Backlog update (as needed)
- Phasing update
- Final comments

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## VISUAL MANAGEMENT

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# Visual Management

- See results
- Allows for early detection/correction
- Keeps focus
- Gives direction
- Rewards success
- Tracking/monitoring

*Your campaign. Your choice.*

**STATEWIDE GOAL!**



**2013 Combined  
Charitable Campaign  
Statewide Total Pledges**

# A Dashboard is....

- A concise visual indicator that displays: clear, measureable and valid metrics for each objective, targets for each metric, and the status of each metric
- We use charts to tell stories, evaluate alternatives, understand trends or find-out if everything is normal

# Dashboard

- Example -The car dashboard shows indicators that give the current measurable status of engine speed, engine temperature, oil temperature, fuel levels and vehicle speed



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# Why Create a Dashboard

- Why Create a Dashboard?
  - Dashboards show a high-level overview of the agency to give a status and make informed decisions
  - Dashboards provide analysis, insight and alert issues or positives in a timely manner
  - Dashboard is an excellent communication tool

***Excel is an excellent tool to make dashboards***

# Dashboard

Week of \_\_\_\_\_  
Month \_\_\_\_\_  
Year \_\_\_\_\_

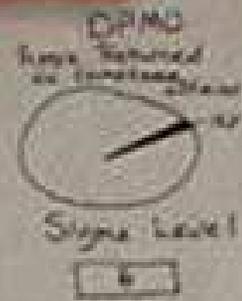


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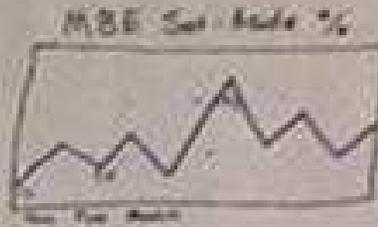
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Total number of Subscribers Approved



Sub Site Image  
List of HVV UCHS  
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## Quote

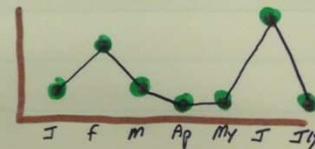
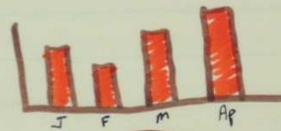
RICH MARTINSKI LEAN CHIO

## CRITICAL SUCCESS FACTORS

WHAT TO MEASURE • HOW TO MEASURE • WHO WILL MEASURE • HOW TO REPORT

### DASHBOARD METRICS

- # CLIENTS
- TIME TO DELIVER
- CLIENT EVALUATIONS
- PROVIDER EVALUATIONS
- MONIES SPENT
- MONIES SAVED

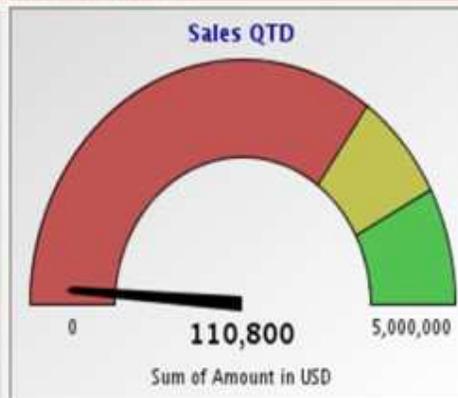


# Dashboard

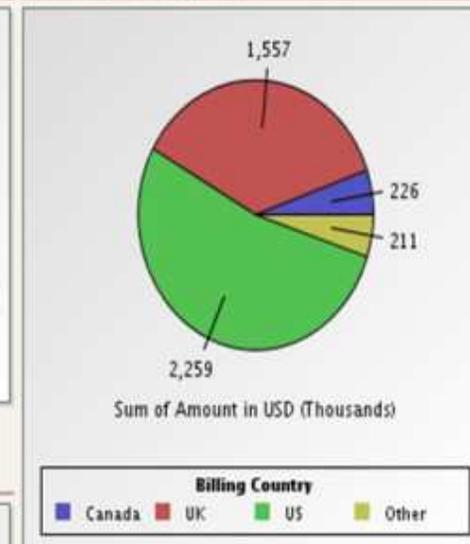
Closed Sales YTD



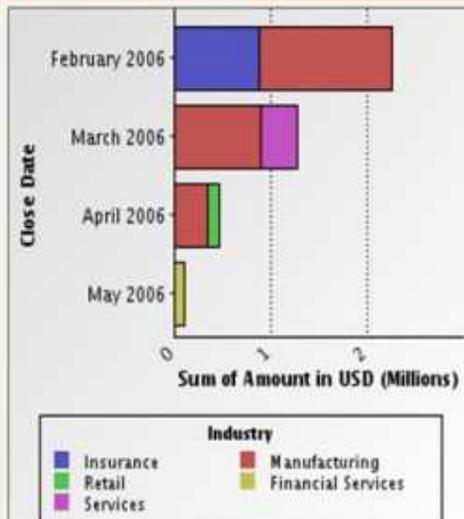
Closed Sales QTD



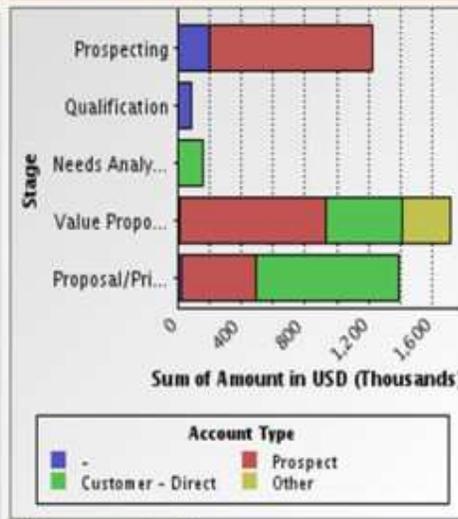
Sales by Country YTD



Closed Sales by Industry



New Business Pipeline



Key Opportunities (Pipeline)

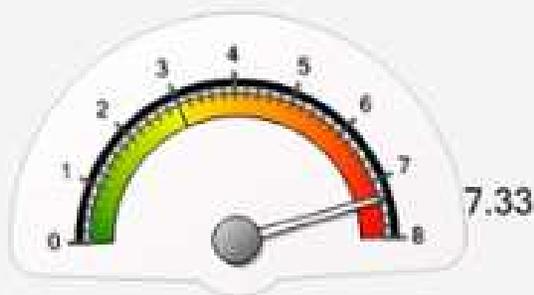
Opportunity Name	Sum of Amount
Cardinal 6 GC 5000	USD 860K
Edge 6 GC 5000	USD 860K
LLoyds 6 GC 5050	USD 800K
ATB Financial upsell opportunity	USD 450K

>400K + < 90 days

Top 5 Sales Reps



# Dashboard



Average Internal P.V Examination Lead Time (Days)



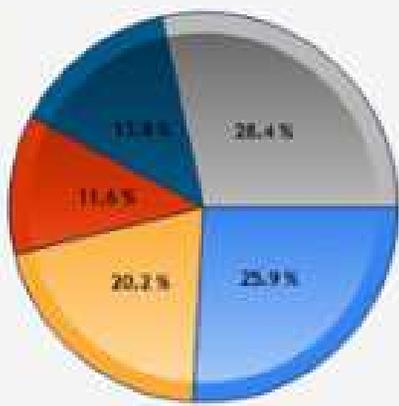
Average Entry Variance (Days)

## Average Internal Audit Lead Time (Days)



## Amounts Contribution

- Below 10K
- Above 10K & Below 50K
- Above 50K & Below 100K
- Above 100K & Below 500K
- Above 500K



# Live Dashboard

worldometers  
real time world statistics

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# Questions?

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