

Choosing a Project

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Choosing a Project

- Look to the “Burning Platform”
- Customer Complaints
- Internal Complaints
- Long Lead Times
- Quality issues
- Management “Pet” project
- Do any baseline metrics exist
- Is it a “reasonable” size (don’t try to boil the ocean)
- Senior leadership committed to the project

Approach

Issue



"Burning Platform"

Department/Division-wide (strategic) issue

Leadership wants action

Measures and data exist



Kaizen

Issue



"I sure would like to fix this"

Office or section issue

Little or no data

Need to create measures



LEAN Tools

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LEAN Tools

- DMAIC
- Value Stream
- Time Studies
- 5s
- Pareto
- Group Decision Making (2-3-4-6 brief meetings)
- Data driven decision making
- Planning Registers

Choosing a Team

- Expertise in the project topic
- People who actually do the work
- Time commitment
- Interest
- Acceptable to the rigor
- Willing to fully participate on team

Choosing a Team

- **Senior Leadership:** Horsepower to make things happen
- **Sponsor(s):** Administrator, etc. with close contact with the team
- **Team Leader(s):** Supervisor, etc. who will take project cradle to grave
- **Subject Matter Experts:** (IT, legal, engineering, facilities, HR, etc.)
- **Customers:** People who receive our services
- **Fresh Prospective:** Provides fresh prospective

Note: Maximum of about 18-20 is ideal

Go – No Go Checklist

- Is the scope complete and the appropriate size?
- ___ Is the scope too large to achieve success? (Don't try to boil the ocean)
- ___ Is the scope so small success will not be transformational? (Don't spend this kind of time and energy unless you can achieve significant results -- at least 50% improvement)
- ___ Are you improving a complete system instead of putting band aids on parts of the process?
- ___ Is there any information/decisions made about future plans, "sacred cows" or past or potential problems the team needs to understand in order to be fully empowered to implement change?

Go – No Go Checklist

- Are the correct people on the team?
- ___ Do you have all the areas of the process being improved represented on the team?
- ___ Do you have the horsepower needed to make critical decisions on the team?
- ___ Do you have customers on the team, or in unusual cases have you surveyed or discussed the event with process users so the “voice of the customer” is represented?
- ___ Have you included thoughtful, good organizational thinkers with little or no knowledge of the process to provide a fresh perspective to the team?
- ___ Are the team members strong, well respected, knowledgeable employees and not the people you can most afford to do without for a week?

Go – No Go Checklist

- Is the necessary data and information to ensure and measure success available?
- ___ Is there baseline data (monthly, yearly volumes; number of FTE's assigned to the process) available for current lead time / cycle time / performance measures?
- ___ If there was a data gathering plan developed, has the information been collected?
- Is the agency ready to immediately implement significant improvements and changes?
- ___ Are there still decisions to be made by management before the team can implement change?
- ___ Is there a strong mandate to do things differently the following Monday?

Go – No Go Checklist

- Is the event a top priority of the agency for that week?
- ___ Is the entire team committed and scheduled to spend the full week focused on the event?
- ___ Are adequate sized large room and breakout rooms available the entire week?
- ___ Is the team leader committed to change, available all week and able to put in the time before, during and after the event to ensure success?
- ___ Are subject matter experts able to be on “stand-by” to support the team as needed?
- ___ Is the sponsor committed to implementing the results and available to help remove barriers during the course of the week?

Go – No Go Checklist

- Is there a common understanding and commitment within the agency about the Kaizen event process?
- ___ Is there an understanding within the agency that the team is not just making recommendations, but will make decisions in consultation with management during the week that will begin to be implemented immediately?
- ___ Are all levels of the organization (management, unions, and affected workers) aware of the Kaizen event and understand that there will be significant changes coming?
- ___ Is there a commitment to designing and implementing the best solution and improvements for the customer by using data, Lean tools and the process?

Scoping a Project

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Lean Event Types

- Kaizen
- Poka Yoke (Form Improvement)
- Value Stream Map (VSM)
- Five S+
- Process Mapping

1st Meeting – 2 Hours

Participants:

- Senior Leadership
- Sponsor(s)
- Team Leader(s)
- Others as Necessary

Topics of Discussion:

- Discuss the issue(s)
- Consider the “Go – No Go” checklist
- Help to focus and narrow the issue(s)
- Determine the Approach (Kaizen or Lean Tools)
- Review and Explain the “Scoping Document”
- Determine who will complete the Scope
- Request data as needed
- Discuss need for Customer/User survey
- Set contacts and next meeting
- Determine potential event date

Within 2 Weeks

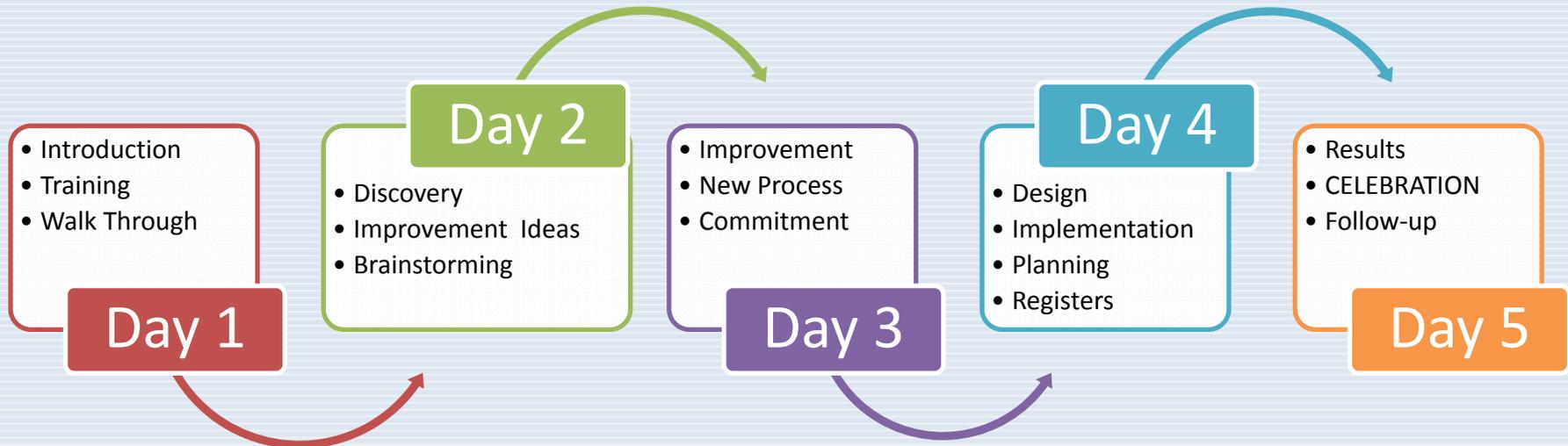
- Phone and Email contacts w/team lead
- Review of Scoping Document
- Adjustments to Scoping Document
- Collection of Data
- Analyze Data
- Analyze Survey data as needed
- Questions and concerns
- Finalize team

Prepare for Event

- Prepare event Training slides
- Prepare event Scope slides
- Prepare event Data review slides
- Prepare Customer survey data slides
- Meet with facilitators to discuss roles
- Check with Team on room and supplies
- Prepare needed supplies

Conduct the Event

Kaizen Event Example



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Kaizen Event

- Training
- Process Map
- Find Waste/Find Value
- Brainstorm
- Clean Sheet Re-design
- Action Registers
- Report Out
- Begin Transformation

Report Out

- Friday preparation and slide assignments
- All team members will report out
- Copy slides and distribute to team
- Study and prep time for team
- Time limit of 1 hour
- Facilitator will introduce
- Team Lead will introduce
- Team members will report
- Senior leadership typically will say words
- Conclude

Follow-Up Meetings

- 30 Days
- 60 Days
- 90 Days
- 6 Months
- 1 Year



Follow-Up Meetings

- Conduct a 2nd 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