

Step 4: Implement

Continuous Improvement

Simple steps toward better business...



- Understand approach
- Start Up
- Develop Scope / Profile
- Form Team
- Manage Effort

- Assess Value from the Customer's Perspective
- Map Process (Current State)
- Go see the work to deeply understand

- Identify Problems and Root Causes
- Identify Improvements
- Prioritize
- Design Future State

- Create Action Plan
- Plan, Do, Check, Adjust (PDCA)
- Manage Change

- Document Achievements
- Recognize Accomplishments
- Publicize Outcomes
- Continuously Improve

Step 4: Implement



- Create Action Plan
- Plan, Do, Check, Adjust (PDCA)
- Change Management

CREATE ACTION PLAN

Plan implementation

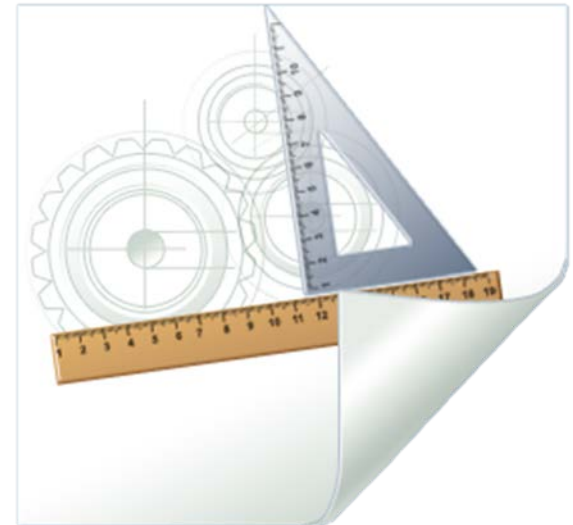
- After deciding which changes to pursue and defining the desired future state, you will need to implement the changes to make the future state real
- Start with an action plan, a tool for achieving a desired outcome
- Can include a list of:
 - Activities/tasks (what)
 - Assignments (who)
 - Schedule/timeline (when)



After doing all of the great redesign, it is critical to follow through on implementing the changes!

Implementation tools to use

- Action Plan (sometimes called Improvement Newspaper)
- Timeline
- Status Reporting
- Metrics tracking
- Change Management Plan
 - Impact Assessment
 - Communication
 - Training



Developing an action plan

1. Brainstorm a list of action steps for each change
2. Sequence the action steps
3. Set target dates for each action step
 - Timing (start & completion)
4. Estimate required resources
5. Assign responsibility for each action step
6. Set review dates at regular intervals (e.g. at 30, 60, and 90 days)
 - Monitor the work closely at the beginning

Articulate the way results will be measured - “how do you know the change is successful?”

PLAN, DO, CHECK, ADJUST (PDCA)

Status and monitoring



- Monitor progress against the plan
- Identify issues before they become problems
- Facilitate communication
- Maintain transparency
- Should not be used for punishment

Determine frequency and who creates and who reviews



Make **VISIBLE** to all (e.g. on a whiteboard)

Status Report - Sample

Template: Status Report			
Project Name:	<i>Title</i>	Overall Project Status (R/Y/G)	G
Project Lead:	<i>Name</i>		
Project Completion Date:	<i>Completion date</i>	Date:	<i>Status Rept Date</i>
Tracks of Work (Status (R/Y/G) & Comments)			
Track of Work	Comments	Status (R/Y/G)	
		G	
		Y	
		G	
Issues Requiring Management Attention			

Definitions:	
Green	Project/Task in line with Project Plan as to time, resources & scope. No risk to execution of project or task
Yellow	Known material risk exists as to execution of task or project in terms of timeline, resources or scope. Team in process of development or execution of "Plan to get to Green" (Risk Mitigation Plan).
Red	Known material risk and impact to execution of task or project in terms of timeline, resources or scope.

Track actual outcomes

Process Measure	Current State	Projected Future	30 day	90 day
Lead Time	19 days	6 days	10 days	
Percent Correct	37%	89%	80%	
Cycle Time for Step 2	44 min	22 min	32 min	

- Capture actual metrics at regular points in time and compare to baseline
- May include narrative of changes that led to improvements
 - *Entering data directly into PeopleSoft and allowing electronic approvals helped eliminate duplicate data entry and paper form routing*
 - *New process has fewer steps and has automatic error checking*

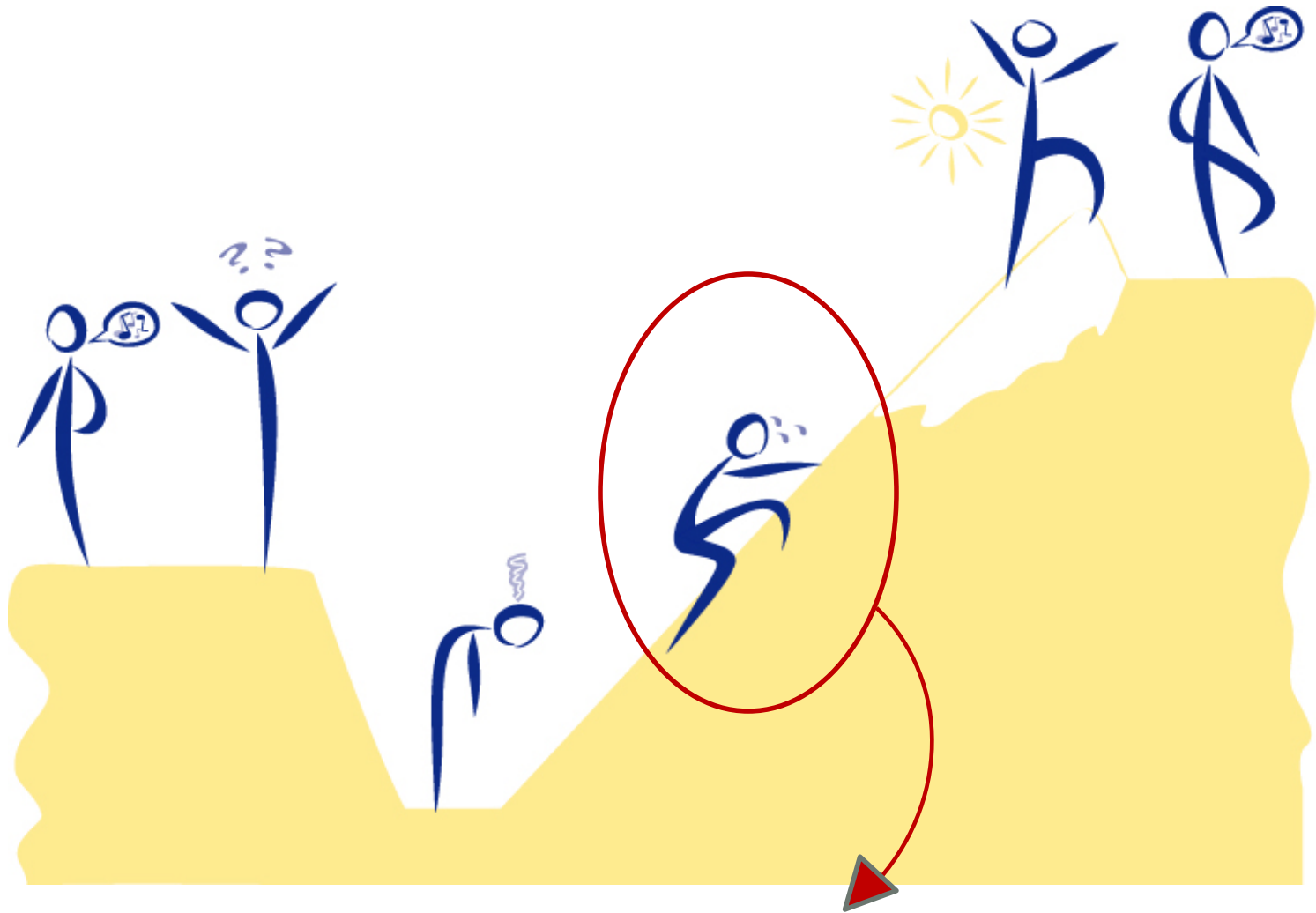
CHANGE MANAGEMENT

Organizational change challenges

- Respect for People is critical
 - People are willing to change, they just need a compelling reason
 - Employees know process is “broken” but typically there is no formal mechanism to share suggestions
 - Obtaining employee input in process improvement effort will enhance engagement and personal satisfaction
 - Show how change benefits them and solves their problems (process participants, downstream customers)
 - Address any perceived threats to jobs – do not use this to reduce workforce

Leadership should support your improvement efforts!

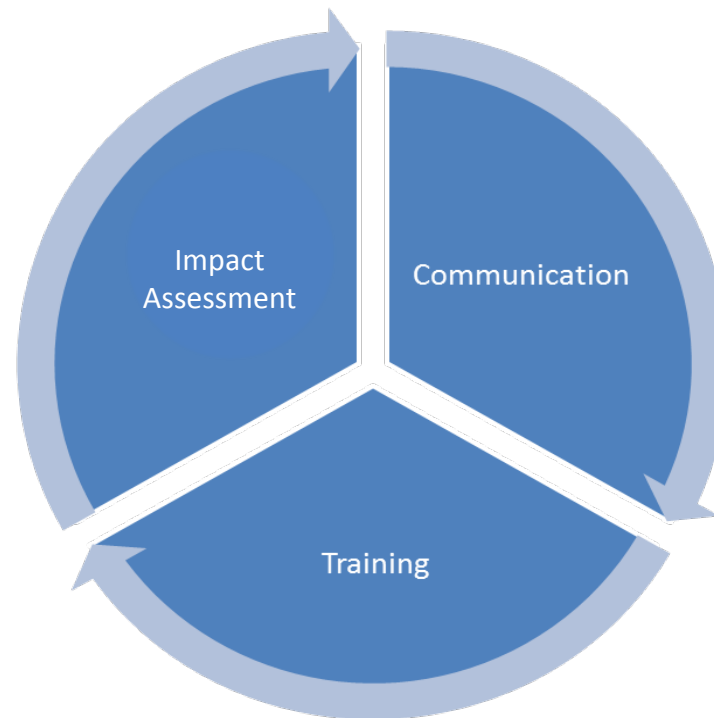
Change is a journey



Change management will make the implementation easier

Change management elements

- Impact Assessment
- Communication
- Training



Assess impacts

- Who is impacted by the changes?
 - Which organizations? Suppliers? Customers? Internal staff?
 - Identify discrete populations because the change management needs for each will vary
- How is each group impacted?
 - Are jobs changing? Do people need training on a new process? Is it a large impact or relatively small impact?

Communication Plan

- Approach:
 - Identify audiences based on impacted groups
 - Identify key messages and timing
 - Consider content packaging, delivery method, frequency, and sender
- Guidelines:
 - Honest
 - Frequent, from decision to implement through post-implementation support
 - Consistent
 - Open and transparent



Communication tools

- Face to face communications
 - SME meetings and other focus groups
 - Champion meetings
 - Town halls
 - Think tanks
 - Training
 - Road show presentations
- Alternate communications
 - Newsletters (e.g. Controller's office, HR)
 - Websites (e.g. Finance3 project)
 - Campus signage
 - Webinars or videos
 - Update emails (e.g. Finance3 Champion email list)
 - UCSF Chatter postings

Communications Plan example

Communication Vehicle	Timing	Process Staff	Customers	Researchers	Departments
Town Hall Meetings	Apr 2015 Oct 2015	●			●
Researcher Meetings	Quarterly 2015			●	
Staff meetings	Monthly	●			
Customer email	Monthly		●		
Office Newsletter	Monthly	●			●
Website	Current	●	●	●	●
Campus-wide Announcements	Go-live	●	●	●	●

Training Strategy

A successful training strategy is built on several elements

Critical Success Factors

- Visible leadership commitment to the project
- Participation from stakeholders and management to provide guidance, awareness, and answers to their departments, as well as direction in attending the appropriate training
- Training curriculum designed to meet the needs of the project

Content

- Provide background on project and benefits
- Focus will be on applicable new or changed key business processes
- Make training content accessible

Delivery

- A variety of tools will be available before, during, and following implementation
- Consider pre-training: e.g. pre-recorded webinars, job aids, quick reference guides
- During training: same as pre-training; consider training guide, webinar, Q&A sessions
- Post-Training: Access to online training materials; scheduled help sessions