



LEAN Ohio
BOOT CAMP
5S
Day 3: Module 1

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Review

- In your teams create a visual representation of what you learned yesterday on a flip chart paper
- Be prepared to share with the class

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Day Three Learning Objectives

Participants will be able to:

- Employ 5S Principles
- Poka Yoke a form
- Explain Standard Work
- Collect Data
- Demonstrate Brainstorming Techniques
- Utilize impact/control matrix

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Introduction



- Who has worked with 5S + Safety?
- What are some of the obstacles to trying to implement and sustain 5S + Safety?
- Why do you think that 5S + Safety is important to Government?

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5S + Safety

- **Sort** – Get rid of all the excess
“When in doubt throw it out!”
- **Straighten** – What must be kept; make visible and self explanatory so everyone knows where it goes
Create an atmosphere where abnormalities are easy to identify!
- **Shine** – Clean and organize daily

Can any item be found in your work area within 10-seconds?

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5S + Safety

- **Standardize** – Create audits / standards for the area
Revisit the area frequently!
- **Sustain** - Have everyone take part and work on implementation
“Stick to the rules and make them a habit”
- **Safety** – Resolve unsafe conditions
Awkward lifts, twists, reached

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5S & Safety Improves Performance and Creates a Better Place to Work...



- Reduced injuries = safer workplace
- Reduced defects = higher quality
- Reduced delays = on-time delivery
- Reduced waste = lower costs
- Reduced time = more time for value added work, more satisfied customers
- Better communication = more responsive
- Reduced complaints = higher confidence and trust
- Remove obstacles = eliminates frustrations
- Reduced breakdowns = higher equipment availability
- Reduced costs = increased ability to meet customers needs

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10-Second Test???



***FISH** "First In Stays Here"*



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"If you spend ten minutes a day searching for something that was "just here a moment ago" then by the end of the year you'll have wasted several working days looking for stuff."

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5S + Safety



10 Second Test

5 S + Safety

5S + Safety

- 1S - Sort
- 2S - Straighten
- 3S - Shine
- 4S - Standardize
- 5S - Sustain
- Safety

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5S + Safety: SORT

5S + Safety
1S - Sort
2S - Straighten
3S - Shine
4S - Standardize
5S - Sustain
Safety

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1S: Sort – Remove unnecessary things

Definition

Purpose

Visual of 1S

- Remove all items from the workplace that are not needed for the job



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1S: Sort – Remove unnecessary things

Definition

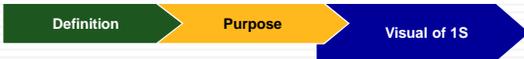
Purpose

Visual of 1S

- **1S avoids the following problems:**
 - Crowded, hard-to-work-in environment
 - Time wasted looking for correct items
 - Unneeded inventory/files costly to maintain
 - Excess inventory that hides problems
 - Unneeded items/equipment make it harder to improve processes

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1S: Sort – Remove unnecessary things



- Begin with clearing the clutter away from a given process... and not be distracted by the piles of non-relevant inventory, tools or accumulated waste.

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1S: Sort – Remove unnecessary things

- Sort essential stuff from non-essential items
- Non-Essential “STUFF” includes
 - Not needed now
 - Not needed here
 - Not needed ever again
 - Not needed in the first place
 - Not needed any more

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1S: Sort – Remove unnecessary things

- Items that need to be removed but cannot be removed right away should be red tagged
- Fill out the red tag information and affix it to the item that needs to be removed

Red Tag No.	
Date	Person
Item Description	
Quantity	
Disposition	
<input type="checkbox"/> Move <input type="checkbox"/> Scrap <input type="checkbox"/> Return <input type="checkbox"/> Store Offsite <input type="checkbox"/> Other	
Comments	

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1S: Sort – Remove unnecessary things

BEFORE



AFTER

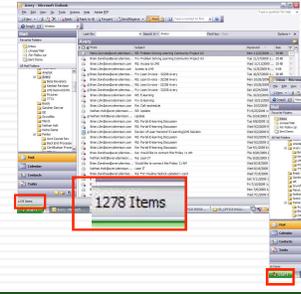


- Deleted unused icons
- Removed unused programs
- Deleted old files or archived onto CD's

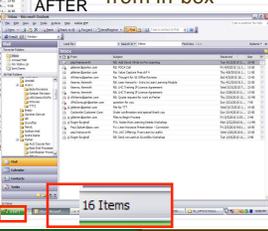
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1S: Sort – Remove unnecessary things

BEFORE



AFTER



- Disposition and/or clear unnecessary or repeat e-mails from in-box

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5S + Safety

- 5S + Safety
- 1S - Sort
- 2S - Straighten
- 3S - Shine
- 4S - Standardize
- 5S - Sustain
- Safety

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2S: Straighten – Organize

Definition

Purpose

Visual of 2S

- Arranging items so they are easy to use and labeling them so they are easy to find and put away



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2S: Straighten – Organize

Definition

Purpose

Visual of 2S

- 2S avoids time wasted looking for correct items by promoting Visual Management

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2S: Straighten – Organize

Definition

Purpose

Visual of 2S

- Simply ensuring a place for everything and everything in its place...
- 2S is all about cutting the time spent looking for things
- Be able to get your hands on exactly what you need quickly

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2S: Straighten – Organize

- Principles of storing files and other tools
- Find "BEST LOCATION"
 - Locate files based on frequency of use
 - Store files & tools together if used together
 - Store them in the sequence used
 - Make them easy to remove/put back
 - Reduce number of files/tools needed
 - Store files/tools according to function or product



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2S: Straighten – Organize

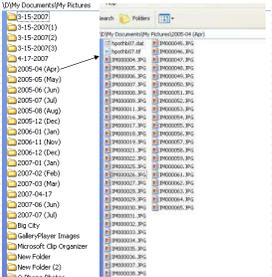
- Organize the necessary items so they can be used and returned easily
- Place all necessary items in the best location and visually organize the area
 - First decide where all items should be so that the organization is easy to use and understand
 - Choose proper storage methods that minimize inventory and promote visual management
 - Visually indicate locations so items in use can be returned and missing items are easily identified
 - Create visuals so anyone can understand the workplace

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2S: Straighten – Organize

BEFORE



- Where is the picture I need?
- Folders and contents do not have meaningful names

AFTER



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2S: Straighten – Organize



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EDIT 2S: Straighten – Organize



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5S + Safety

5S + Safety
1S - Sort
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3S - Shine
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Safety

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3S: Shine – Clean

Definition Purpose Visual of 3S

- Sweeping floors, wiping off machinery, & generally making sure everything in the facility stays clean



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3S: Shine – Clean

Definition Purpose Visual of 3S

- By ensuring everything is clean, it is easier to detect when and where there is a problem with a process or piece of equipment

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3S: Shine – Clean

Definition Purpose Visual of 3S

- Concentrate on shining, cleaning, brightening and cleansing the area
- If you work in a “spic & span area, you are less likely to be distracted by dirt. People begin to respect their areas and office!

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3S: Shine – Clean



This is Before... so what should After look like?

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3S: Shine – Clean



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5S + Safety

5S + Safety
1S - Sort
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4S: Standardize – Define the best way



- Standardize processes, make things consistent
- Create rules for cleaning and maintenance



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4S: Standardize – Define the best way



- Make a habit of properly maintaining correct processes
- Moving into 4S or Standardization begins to change the event from one of “housekeeping” to true process transformation

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4S: Standardize – Define the best way



- Start tackling the issues of transforming the culture...
- It provides us with tools, standards, consistency, and, all the training, processes, audits & checklists necessary to make it understood and routine

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4S: Standardize – Define the best way






Before



Before

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4S: Standardize – Define the best way



After

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4S: Standardize – Define the best way

DESCRIPTION	QUANTITY	UNIT	LOCATION	DATE	STATUS
1. Wipe off all Dry Erase Boards	36				
2. Move all Dry Erase Boards back into the corner of the room.	36				
3. Push the TV Stand back into the corner of the room.	5				
4. Push all Chairs back under the table/desk	36				
5. Clean off all Desk/ Table (Use Paper Towels)	45				
6. Unplug all all Power Cables	16				
7. Place TV Stand in corner of room if power outlet closest to TV	5				
8. Place Power Instruction Manual on top of power outlet closest to TV	2.5				
9. Put Chairs back into the corner of the Table	2.5				
10. Push any excess cables back into the table	16				
Total Items	150				




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5S: Sustain – Define how to maintain the best way

Definition Purpose Visual of 5S

- Create buy-in to hold the first 4S's together
- Develops good work habits that will continue over the long term



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5S: Sustain

Definition Purpose Visual of 5S

- Make a habit of properly maintaining correct processes
- Culture change! 5S is quoted as one of the most important Lean Tools because it is the foundation of all other tools

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5S: Sustain

Definition Purpose Visual of 5S

- Focuses on getting the first 4S's to be welded into the culture of the organization
- The trick is to make the entire thinking process surrounding 5S part of the living, breathing, everyday mode of operation

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Safety: Keep your work place free from injury



- Keep your work place free from injury



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Safety



- Respect for our employees
- By following the principles of 5S, a safe work environment is provided for all

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Safety



- Making the workplace safe – a focus no one can argue with
- The most important of all the S's, the creation of a totally safe and healthy work environment

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Safety

- Beware of...
 - Tripping hazards
 - Slip hazards
 - Pinch points
 - Unstable stacks or struc
 - Motorized equipment
 - Toxic materials
 - ...and many others



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5S + Safety Summary

5S	Descriptions
1S Sort	<ul style="list-style-type: none">Get rid of all the excessWhen in doubt, throw it out!
2S Straighten	<ul style="list-style-type: none">What must be kept, make visible and self-explanatory so that everyone knows where it goes. Daily abnormalities are easy to identify
3S Shine	<ul style="list-style-type: none">Clean and organize daily
4S Standardize	<ul style="list-style-type: none">Create audits and standards for the areaRevisit the area frequently
5S Sustain	<ul style="list-style-type: none">Have everyone take part in the implementation – stick to the rules and make them a habit
Safety	<ul style="list-style-type: none">Resolve unsafe conditions – awkward lifts, twists, reaches

Can any item be found in your work area within 10 seconds?

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5S Plus Safety Exercise

- In your DOP groups take all of the 5S plus Safety tools that you have just learned and employ them on your DOP area.
- The team that demonstrates the most 5S Plus Safety tools in their DOP area will win.
- Your team will have 10 minutes for this activity.
- Be prepared to have a representative report out your teams 5S improvements to the judge.

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Lean Tools
Day 3: Module 2

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Lean Project Roadmap

Preparation	Level Setting	Current State: Make the Invisible Visible	Improvement Design	Implement and Action	Control and Sustain
Scoping and SIPOC	Team Formation	Current Process Map	Brainstorming and Evaluation	Implementation Plans - Action Registries	Reporting - Celebration
Project Charter	Consensus on Project Charter as SIPOC	Lean Tools	Lean Principles in Process Design	Poka-Yoke	Project Management
Identify Team	Review Baseline Data	Identification of VA, NVA, NVAN	Clean Sheet Redesign	Visual Management - Dashboard	Change Management
Data Collection Plan (Baseline Data)	Data Analysis	Analysis of Current State	Future State	Project Savings	Monitoring and Follow-up

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What is Lean?

Lean is defined as a systematic approach to identifying and **eliminating waste** through:

- Continuous improvement
- Sequencing the service or product at the pull of the customer

Lean focuses on speed without sacrificing quality for the customer

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Seven Key Principles of Lean

1. Define value in the eyes of the customer
2. Identify the process for a service or product
3. Create continuous flow without interruptions
4. Reduce defects in services or products
5. Let customer pull what they want
6. Pursue perfection (Six Sigma)
7. Eliminate or reduce variation

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Variation is Evil

- Variation=lack of standardization
- Common causes of variation:
 - Missing information
 - Unsure of the answer
 - Lack of training
 - Non-standard lists, signs, manuals

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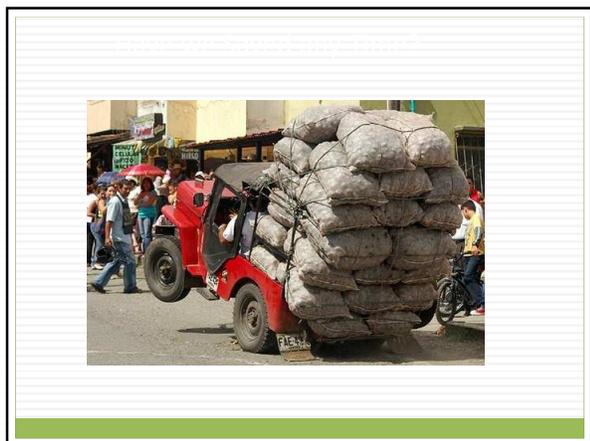
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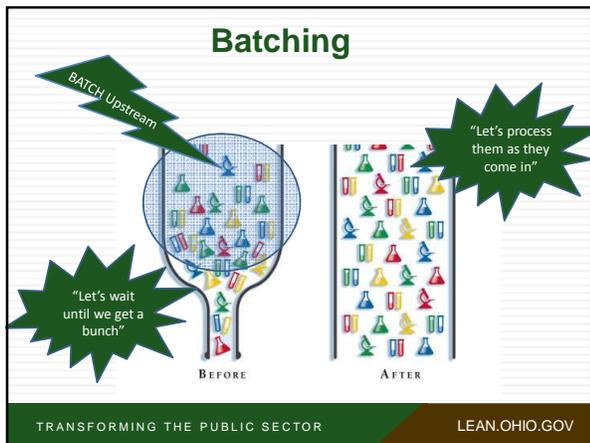
Batching

- **“BATCHING is the enemy of speed.”**
-Miller

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Push vs. Pull

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Push vs. Pull

Push Produce records and sell them to the public	Pull Choose a song and download to an iPod
	

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Pull

- The customer is in charge - what they want, when they want it
- Reduces overproduction, inventory and over processing
- Flexibility = "ready when they are"
- Reduces waste and backlog
- Drastically increases customer satisfaction



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Pull

- Coke vending machine delivers Coke when I want
- Grocery store shelves dispense products when I pull one off the shelf
- On-line vehicle registration
- I want to do business with the state

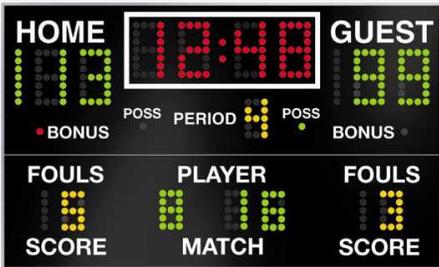


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Visual Management

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Think Basketball: Do You Know the Score!



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Visual Management

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



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Visual Controls

The workplace is set-up with simple signals, such as signs, labels, color-coded markings, etc. to help know:

- What is going on
- Understanding of the process
- What is being done correctly
- What is out of place

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Visual Controls

- Supply feedback:
 - Helps keep things running safely, smoothly, and efficiently
 - Allows the people operating the process to stay on target
- Examples:
 - Schedule or status boards
 - Color-coded files / transactions
 - Appropriate signage to direct people to areas

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Filling in the Task Lists

- Color (or fill in electronically) the status of YOUR task
 - Complete the status update BEFORE the weekly update meeting
- | | |
|-------------------|-------------|
| ○ Proposed Start | On Schedule |
| ● Actual Start | Slipping |
| △ Proposed Finish | Late |
| ▲ Actual Finish | |
| ◇ Review | |

Visual Management Examples

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ODOT



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Visual Management in Office Areas



Customer Service Center

Uses monitors for tracking:

1. Employee 'status' – available, not available
2. Current customers in queue
3. Longest current 'hold' time

Also – Visible 'Escalation' for customers on 'hold' beyond targeted time

ODOT: Monitor Projects



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Accounting Visual Management



Color Coded – Alert Files

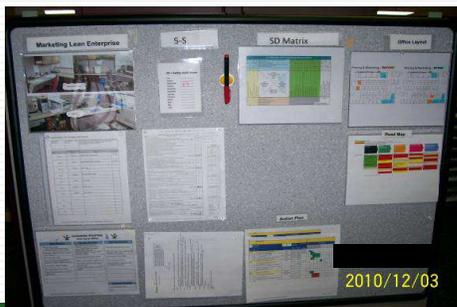
ORANGE
ATR > 60 days old
Credits > 60 days old

RED
Invoice Issues (3 way match)
Expense and Inventory Folders

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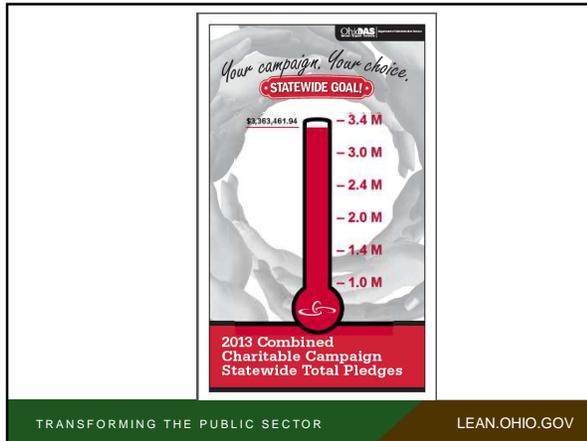
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Marketing & Sales Implementation



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First Time Quality

- Never passing a defect on to the next process or person
 - Fix immediately
 - Find root causes
- Building a system with appropriate information
- Building poke-yoke (mistake-proofing) devices for common problems
- Establishing clear decision rules

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Standard Work Exercise:

1. Use the blank side of the paper
2. Draw a picture of a pig with:
 - Nose - Nostrils
 - Mouth - Eye
 - Four legs - Body
 - Tail -Two ears
3. Must complete the drawing in 40 seconds per customer demand
4. Display your drawing after completing the picture for final inspection

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Processes Should be Standardized

- Customer must always get the same answer no matter who they ask
- Customer must get the same answers no matter what time of the day, or day of the week they ask
- Customer must always get on-time, complete, and accurate information

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A Standard Process Is...

- The best combination of people and resources balanced to customer requirements
- **Efficient:** using the minimum amount of people, space, materials, and equipment while meeting customer requirements

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Standard Processes

Why Implement Standard Processes?

- To make it possible to identify and eliminate variations in work
- To deliver consistent service to citizens

How Do You Use Standard Processes?

- Document each standard process
- Display the documentation
- Ensure that all staff are trained

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Things to Consider

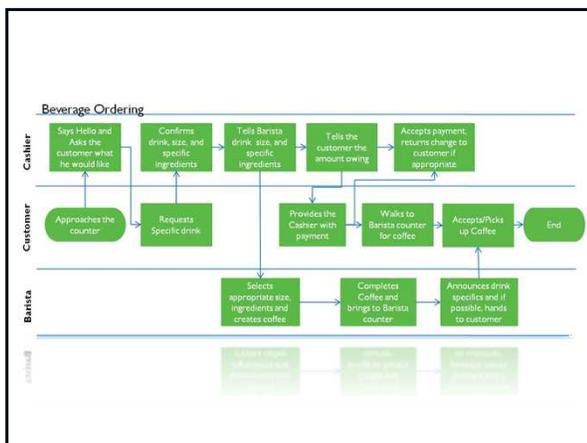
- Where should decisions be made?
- What knowledge or skills are truly required to perform the steps?
- Can the steps be simplified so they are less dependent on knowledge and skills?

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Standard Work – Make it Work

- Each operation is analyzed at a 1,000 foot level
- Employees are given the tools they need to work efficiently and quickly
- Process should be documented in writing and with photos
- Standard Work provides the baseline for continuous improvement and stability through reduced variation

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Standard Work: Process

- The sequence or order to produce the service
- The expected time to complete the steps based on the lowest repeatable time observed
- Criteria and expectations on quality provided

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Work Structure Principles

- Design process around value-adding activities
- Work performed where it makes the most sense
- Provide single point of contact for customers and suppliers
- If the inputs coming into the process naturally cluster, create a separate process for each cluster

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Work Structure Principles (2)

- Ensure a continuous flow of the “main sequence”
- Reduce waiting, moving, and rework time
- Reduce or eliminate batching
- Reduce checks and reviews
- Push decision-making down to the lowest reasonable level
- Build quality in to reduce inspection and rework

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Questions on Lean Tools?

Batching
Push vs. Pull
Visual Management
First Time Quality
Standard Work
Work Structure Principles

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BOOT CAMP

Poka-Yoke
Day 3: Module 3

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Lean Project Roadmap

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Learning Objectives

Participants will be able to:

- Identify ways to error proof a process
- Construct a Pareto chart
- Identify your biggest opportunity for improvement
- Create customer friendly forms

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Reactions

- "What an idiot!"
- "Most people know enough to remove the hose before they drive off - why should we change things for one fool?"
- "Maybe this is a good way to screen drivers, as he/she is clearly not smart enough to be on the road"
- "There's just nothing that can be done to help some people"
- "What can we do to prevent that mistake from ever happening again?"

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Three Rules for Defect Reduction

Your Supplier	You	Your Customer
Don't accept defects	Don't make a defect	Don't pass on a defect



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Poka-Yoke Definition

- **Poka-yoke** is a Japanese term that means "mistake-proofing"
- To correct mistakes before they happen

Mistake Proofing is everywhere from our home, to our car, to our work

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**Presidential Limo
(Gasoline vs. Diesel Fuel)**



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מוטי גורר אוח

SIMPLER. FASTER. BETTER. LESS COSTLY. LEAN Ohio

**How does Poka-Yoke apply to
Government work?**

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Government Forms

- Government processes involve forms
- Government employees are frustrated that users of their services can't complete a simple form
- During a Kaizen event almost every team identifies waste that involves forms
- **More than 95%** of State of Ohio Kaizen Event teams to date have implemented improvements that reduce mistakes, delays and frustration around forms

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Love/Hate Relationship with Forms

Government Loves

- The more information the better
- The bigger the words the more impressive
- Completely familiar with all the jargon and issues

Citizen's Hate

- The longer the form the more frustrating
- The bigger the words the more likely to confuse
- Unfamiliar jargon and acronyms

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Use DATA for Mistake-Proofing Forms

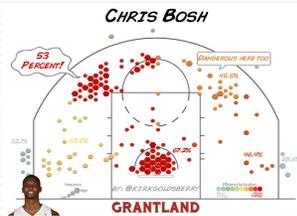
- What percentage of times is the form completed with no errors?
- How many errors are made?
- How much time is spent reviewing the form and correcting errors?
- Create checklist to breakdown errors by type or by question
- Create **Pareto Chart**
- Look for Root Causes
- Test / Implement solutions
- Review how many, how often, what kind and how long

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Concentration Diagram

- Concentration Diagrams are great ways to collect data for your forms
- Basketball example



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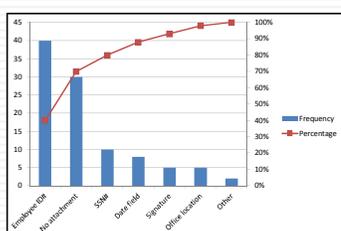
Concentration Diagram



- Put data in a visual form for all to see
- Entire team sees exactly what is being tracked
- Visibility helps employees prioritize issues and develop ideas to eliminate root causes

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Pareto Chart



A Pareto chart is a bar graph with the bars sorted in order of decreasing frequency. It is used to identify the largest opportunity for improvement.

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Pareto Chart

- The lengths of the bars represent frequency or cost (time or money), and are arranged with longest bars on the left and the shortest to the right
- In this way the chart visually depicts which situations are more significant
- Theory that 80% of the output in a given situation is produced by 20% of the input

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Pareto Chart: When to Use

- When analyzing data about the frequency of problems or causes in a process
- When there are many problems or causes and you want to focus on the most significant
- When communicating with others about your data

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Next Steps

- Review missed questions with employees and with customers
- Review statute, code, rules to see if you really, Really, REALLY need to ask the question
- Use software to test the age level and readability of forms

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How readable are your forms?

- Have you ever tested the reading level of your forms, letters or website?

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Reading Levels: Why you should care

According to the National Adult Literacy Survey:

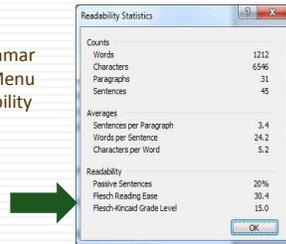
- The average adult in the U.S. reads at the 7th grade level
- **Nearly 50%** read below the 6th grade level
- **Over 80%** read below the 10th grade level

The largest selling magazines, newspapers and books are written at lower grade levels.

How to check the reading levels

Microsoft Word has reader level features:

Go to the Spelling and Grammar Page of the Tools/Options Menu and checking "Show Readability Statistics."



Understanding Readability Scores

- Looks at # syllables and # words per sentence.
- Flesch Reading Ease Test: the higher the score, the easier it is to understand. You want the score to be between **60 and 70**.
- Flesch-Kincaid Grade Level Test: rates text on a U.S. school grade level. For most documents, aim for a score of approximately **7.0 to 8.0**.

Bulleted Lists are GREAT!

Potential Improvement Ideas

- Remove unnecessary questions
- Explain questions that may seem unnecessary **?**
- Eliminate unnecessary typing with pull down menus if online, or boxes to check if a paper form
- With pull down menu, ensure most common answers are first
- Highlight required fields



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Potential Improvements

- **Online forms can't be sent if information is left blank**
- Create an FAQ or checklist to accompany the form that explains to customers exactly what is needed. (Make most frequently missed questions the first thing on the checklist)
- The most important questions are highlighted or in a prominent location

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Poka-Yoke LeanOhio Form

This form is for people who work in Ohio state government

If you qualify to be a member of the LeanOhio Network, and if you have read and agree to the terms of use and participation, please use the following online form to apply for membership. The LeanOhio Program Office will contact you regarding your status. All new members receive a username and password to log in to LeanOhioNetwork.org, where they can post comments at the site's Network forums and in response to blog posts. In addition, you are listed in the online Network Directory, with information from the following form being used to describe your experience, credentials, and knowledge.

To complete the form, simply follow the prompts, responding to the items that apply to you. If an item isn't relevant, just leave it blank and move on to the next item.

Thank you for your interest in becoming a part of the LeanOhio Network. We will respond promptly to your application for membership.

START HERE: BASIC INFO

Your first name: Last name: Please fill in the required field.

Your email address: Please fill in the required field. Phone number (with area code): Extension:

Agency where you work: Office or section: Your title:

Street address: Floor or suite number: City: State: Zip code:

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Examples from LeanOhio Projects

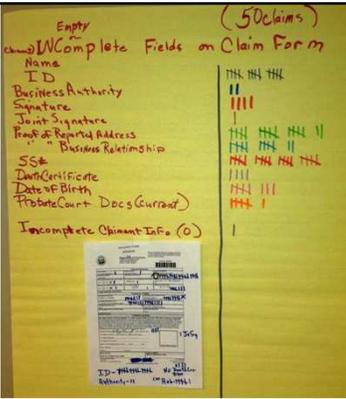
Department of Commerce

Unclaimed Funds Form

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Empty
and Incomplete Fields on Claim Form (50 Claims)

Name	
ID	
Business Authority	
Signature	
Joint Signature	
Proof of Reported Address	
Business Relationship	
SSN	
Date of Birth	
Probate Court Docs (Current)	
Incomplete Claimant Info (0)	1



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Examples from LeanOhio Projects

Department of Mental Health

Home health service
certification supplemental
application

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EXERCISE: Review the Form

1. Prioritize most common errors from concentration diagram
2. Consider the root causes of the errors
3. Develop Poka-Yoke ideas to prevent future errors
4. On a flip chart page, draft a new form that incorporates those ideas
5. Point system will be used to select winning team



Brainstorming
Day 3: Module 4

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Lean Project Roadmap

Preparation	Level Setting	Current State: Make the Invisible Visible	Improvement Design	Implement and Action	Control and Sustain
Scoping and SIPOC	Team Formation	Brainstorming	Brainstorming and Evaluation	Implementation Plans - Action Registries	Reporting - Celebration
Project Charter	Consensus on Project Charter and SIPOC	Identification of Waste	Lean Principles in Process Design	Poka-Yoke	Project Management
Identify Team	Review Baseline Data	Identification of VA, NVA, NVAN	Clean Sheet Redesign	Visual Management - Dashboard	Change Management
Data Collection Plan (Baseline Data)	Data Analysis	Analysis of Current State	Future State	Project Savings	Monitoring and Follow-up

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How creative is your team?

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Mental blocks to creative thinking & problem solving

-Prejudice



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Mental blocks to creative thinking & problem solving

-Prejudice
-Functional fixation



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Mental blocks to creative thinking & problem solving

-Prejudice
-Functional fixation
-Learned helplessness



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Mental blocks to creative thinking & problem solving

- Prejudice
- Functional fixation
- Learned helplessness
- Psychological blocks



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Psychological blocks

"Computers in the future may weigh no more than 1.5 tons."
-Popular Mechanics, 1949

"There is no reason anyone would want a computer in their home."
- Ken Olson, founder of Digital Equipment Corp, 1977

"If I had thought about it, I wouldn't have done the experiment. The literature was full of examples that said you can't do this."
-Spencer Silver, 3-M, 1968

"[Television] won't be able to hold on to any market it captures after the first six months. People will soon get tired of staring at a plywood box every night."
-Darryl Zanuck, 1946

"There will never be a bigger plane built."
-Boeing, after the first flight of the 247

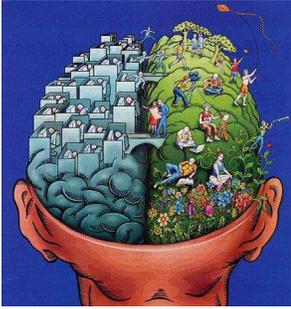
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**Mental Blocks:
Thank Your Left Brain!**

- Analytical
- Logical/Pragmatic
- Narrow Focus
- Brainstorming and creative thinking are right brain functions.

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Left vs Right



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Brainstorming: What is it?

- Brainstorming is used to generate a large number of ideas about a specific problem or topic
- Encourages creative thinking
- Helps avoid the "paralysis of analysis" by not evaluating ideas

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Brainstorming Rule

- Every idea counts
- Postpone judgments until after the brainstorming session is completed
- Create a safe environment to share ideas

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Brainstorming Pre-Work

- A well-defined and clearly stated problem
- A group member assigned to act as recorder and write down all the ideas as they are shared
- The right number of people
- Ground rules for the session

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What is the “right” group size?

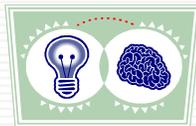
- Easy to schedule
- All areas have a representative
- Work can be divided equitably among group members
- Consensus can be reached
- New and creative ideas are generated

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Brainstorming Techniques

- Silent Brainstorming
- Impact Control Matrix
- Nominal Group Technique
- Carousel Brainstorming
- Affinity Diagram



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Silent Brainstorming

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Silent Brainstorming: Definition/Benefits

- Participants write ideas down individually
- Allows everyone to participate without pressure
- Leads to more potential solutions
- Buy-in to solution
- Helps determine feasible solutions

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Silent Brainstorming: Procedures

- Participants write ideas individually on Post-it notes or small slips of paper
- Collect the papers and post them for all to see
- Put them in like categories (Affinity Diagram)
- Rank ideas (Impact Control Matrix)

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Affinity Diagram

The diagram illustrates the process of creating an affinity diagram. It starts with a collection of approximately 25 scattered blue squares. An arrow points to a structured version where the squares are grouped into four columns labeled 'QUALITY', 'SERVICE', 'DELIVERY', and 'PRICE'. Each column contains squares of a corresponding color: blue for Quality, green for Service, red for Delivery, and yellow for Price. There are also a few orange and purple squares at the bottom.

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Affinity Diagram: Background

- To organize large groups of information into meaningful categories
- Breaks old patterns of thought to reveal new patterns, and generate more creative ways of thinking
- Used to gather, correlate, and relate large quantities of information

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Affinity Diagram: Process

- Place ideas in central location
- Ask or direct the team to come up with a headline to describe each thought
- Arrange the post-it notes or small slips of paper in related groupings
- Complete the groupings

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Affinity Diagram: Process

- Involve the group in clustering the notes into 6-10 related groupings (team will do this silently)
- Be prepared for some "loner" ideas; avoid forcing them into a group
- Some notes may need to be duplicated for different groupings
- Choose a word or phrase that captures the intent of each group and place it at the top as a header card

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Impact Control Matrix

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Impact Control Matrix: Background

- Used for organizing ideas and categorizing them
- Used to determine solutions that are within the group's control and would have the most impact

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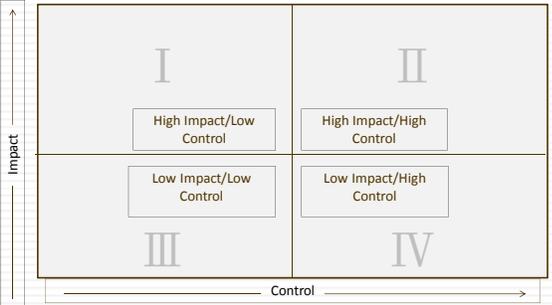
Impact Control Matrix: Procedure

The ideas are placed (by the team) into one of the four quadrants

- High Impact/Low Control-Quadrant I
- High Impact/High Control Quadrant II
- Low Impact/Low Control-Quadrant III
- Low Impact/High Control-Quadrant IV

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Impact Control Matrix



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Silent Brainstorm & Impact Control Matrix



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Carousel Brainstorming

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**Carousel Brainstorming:
Definition/Benefits**

- Participants will rotate around the classroom in small groups, stopping at various stations for a designated amount of time
- Members will brainstorm with peers while at each station
- Through movement and conversation new ideas will emerge

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Carousel Brainstorming: Procedure

- Generate X number of questions for your topic and write each question on a separate piece of poster board or chart paper (Note: The number of questions should equal the number of groups)
- Post questions sheets around the room
- Divide team into groups of 5 or less
- Direct each group to stand in front of a question station
- Give each group a colored marker for writing their ideas at the question stations (use a different color for each group)

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Carousel Brainstorming: Procedure

- Inform groups that they will have 2-3 minutes to brainstorm and write ideas at each question station
- When time is called, groups will rotate to the next station in clockwise order
- Using a timer, begin the group rotation. Continue until each group reaches their last question station
- Before leaving the final question station, have each group select the top 3 ideas from their station to share with the entire group

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Nominal Group Technique

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Nominal Group Technique

- Can help reduce many ideas to the top issues quickly
- Gives everyone in the team an equal voice and participation
- Useful with vocal teams
- Controversial topics

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Nominal Group Technique

- Phase One:
 - Same as Silent Brainstorming.
- Phase Two:
 - Go over the list and ask for clarifications
 - Number each of the items starting at the top
 - Participants rank Top Five (stickers)
 - Determine top ranked items



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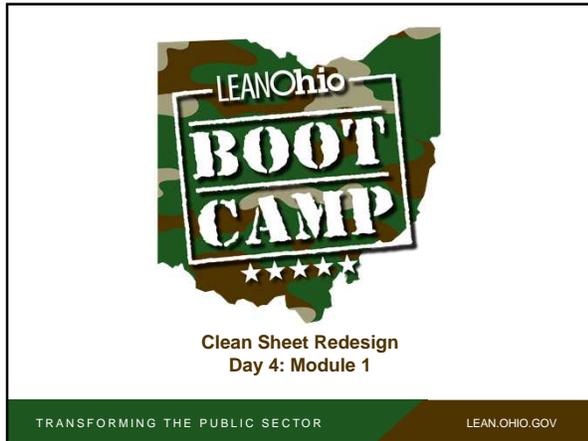
Nominal Group Technique

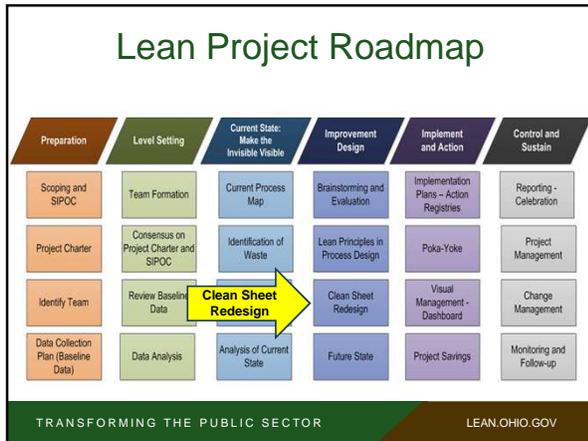


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Questions on Brainstorming?

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Day Four Learning Objectives

Participants will be able to:

- Employ lean principles to a clean sheet redesign
- Develop a desired future state
- Use action registers and Gantt charts to develop an implementation plan

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Clean Sheet Redesign – Future State

How do we go from here.....



To HERE!

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Clean Sheet Redesign

- Is a process of using the analysis of the current state, the brainstormed ideas, and the principles of effective work structure to create an ideal future state
- The goal of clean sheet redesign is transformation of the process

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Before Clean Sheet Redesign...

- Complete the Current State
- Gain Consensus on Current State
- ID Waste (TIM U. WOOD) on Current State
- Document Value Add on Current State Map
- Brainstorm New Ideas
- Review Work Structure Principles
- Evaluate and Prioritize the Brainstorm Ideas

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Clean Sheet Goal

Goal: TRANSFORMATIONAL

- Create a new process that's significantly better than the old one
- Reduce process steps, cost, time by 50%
- Delight the customers of the process
- Put aside the "as is" model

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Work Structure Principles

- Design process around value-adding activities
- Work performed where it makes the most sense
- Provide single point of contact for customers and suppliers
- If the inputs coming into the process naturally cluster, create a separate process for each cluster

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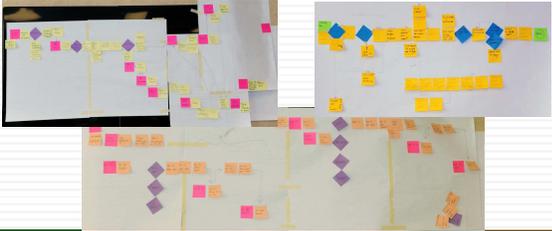
Work Structure Principles (2)

- Ensure a continuous flow of the "main sequence"
- Reduce waiting, moving, and rework time
- Reduce or eliminate batching
- Reduce checks and reviews
- Push decision-making down to the lowest reasonable level
- Build quality in to reduce inspection and rework

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Clean Sheet Redesign

- The team divides into small groups that each create a Clean Sheet Redesign of the process



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Clean Sheet Redesign

- Start with understanding what you are to trying to achieve with a new process
- Letting go of the current state can be challenging
- Keep it about the process, not the people
- Allow adequate time, but agree on a hard stop
- Use process mapping to document the new ideal process

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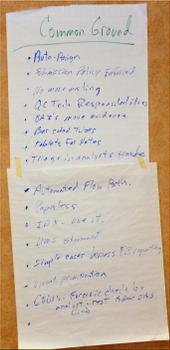
Clean Sheet

- Ask *Is it Transformational?*
- Are you reaching consensus?
 - Consensus may be at different levels – make sure the group has clear understanding and agreement before moving on

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Next Steps

1. All three teams report their clean sheets to the whole group
2. Identify Common and Unique elements as the teams report out
3. Reach Consensus on the common and unique things the team must have in the new final future state
4. Involve Leadership/Sponsor to give a vote of confidence (or right the ship)



Common Ground

- Auto-Admin
- Automation Policy Framework
- No more waiting
- 20 Tech Responsibilities/Steps
- 2015 space reduction
- Auto-Admin Tools
- Policies for future
- Training - annual/quarterly

- Automated Plan Book
- Analytics
- 2015 - use IT
- 2015 - planning
- Simple paper version for reporting
- Local Automation
- 2015 - 2016 - 2017 - 2018 - 2019 - 2020 - 2021 - 2022 - 2023 - 2024 - 2025 - 2026 - 2027 - 2028 - 2029 - 2030 - 2031 - 2032 - 2033 - 2034 - 2035 - 2036 - 2037 - 2038 - 2039 - 2040 - 2041 - 2042 - 2043 - 2044 - 2045 - 2046 - 2047 - 2048 - 2049 - 2050 - 2051 - 2052 - 2053 - 2054 - 2055 - 2056 - 2057 - 2058 - 2059 - 2060 - 2061 - 2062 - 2063 - 2064 - 2065 - 2066 - 2067 - 2068 - 2069 - 2070 - 2071 - 2072 - 2073 - 2074 - 2075 - 2076 - 2077 - 2078 - 2079 - 2080 - 2081 - 2082 - 2083 - 2084 - 2085 - 2086 - 2087 - 2088 - 2089 - 2090 - 2091 - 2092 - 2093 - 2094 - 2095 - 2096 - 2097 - 2098 - 2099 - 2100

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Activity

1. Get in your DOP groups and each create a Clean Sheet Redesign
2. Report out the clean sheet designs with the whole group

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Implementation Plans
Day 4: Module 2

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Lean Project Roadmap

Preparation	Level Setting	Current State: Make the Invisible Visible	Improvement Design	Implement and Action	Control and Sustain
Scoping and SIPOC	Team Formation	Current PI Map	Implementation Plans	Implementation Plans - Action Registries	Reporting - Celebration
Project Charter	Consensus on Project Charter and SIPOC	Identification of Waste	Lean Principles in Process Design	Poka-Yoke	Project Management
Identify Team	Review Baseline Data	Identification of VA, NVA, NVAN	Clean Sheet Redesign	Visual Management - Dashboard	Change Management
Data Collection Plan (Baseline Data)	Data Analysis	Analysis of Current State	Future State	Project Savings	Monitoring and Follow-up

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Implementation Plans

- Objectives
- Tasks
- Time allocation
- Progress



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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

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“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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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
- Lack of leadership / sponsor support
- No accountability and follow through



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Implementation Plan Tools

- Action Registers
- Timeline Tree
- Gantt Chart



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Action Registers

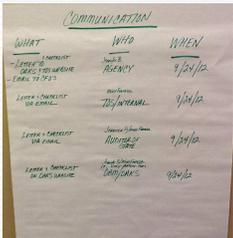
What	Who	When

- **What** task or objective needs to be accomplished
- **Who** will take the lead in seeing that the team accomplishes it
- **When** the task will begin and when it will be completed

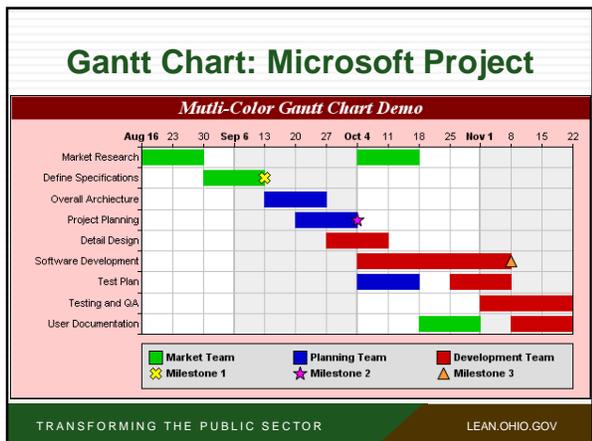
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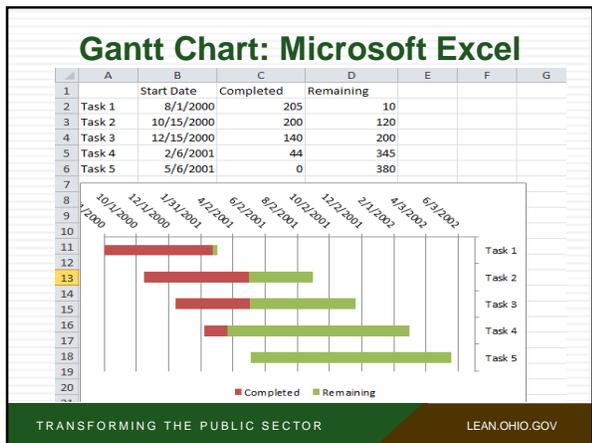
Action Register (Samples)

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



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Follow-Up Meetings

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

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Follow-Up Meetings

- Conduct a second customer satisfaction survey 6-9 months after implementation to identify progress and needs
- Update dashboard (visual management)
- Promote recognition opportunities for successful teams

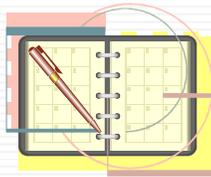


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Follow-Up Agenda

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



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Questions on Implementation Plans?

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Future State Process Mapping

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Developing the Future State

- Representatives of the three groups form a new team and combine the work from the three teams to one final future state
- The team presents the new future state to the entire team
- Check for consensus

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Activity

1. Representatives of the three groups form a new team and combine the work from the three teams to one final future state
2. Final future state presented to whole group
3. Other groups will work on other tasks

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Team Members

- Who should be on the team?
 - Core Team Members: People who do the work or supervise the work
 - Team Leader
 - SME's
 - Fresh Perspective
 - Perhaps Customers
- TRAIL Chart

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TRAIL Chart

- T – Team Member
- R – Resource
- A – Approver (Process owner)
- I – Informed
- L - Leader

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Teamwork

• Obstacles? Things that help?



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Teamwork Obstacles

- Lack of Respect for Peers
- Incompatible Personalities
- Poor Communication
- Poor Decision-Making Skills
- Lack of Tools for Collaboration
- Lack of Clear Customer Focus
- Lack of Support and Buy-In
- Different Ways of Thinking

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GRPI Model

- Clear and commonly understood **goals**
- Defined and agreed upon **roles and responsibilities**
- Defined and agreed upon **procedures**
 - Decision-making, meeting management, communication with those outside the team
- Understanding of **Interpersonal Relationships** - personal strengths, ways of communicating and contributions

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Team Leader Role

- Manages the project and the team
- Primary contact point
- Keeps the team and project records
- Solicits help from the project sponsor to overcome project barriers
- Team conflict resolution

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Team Sponsor Role

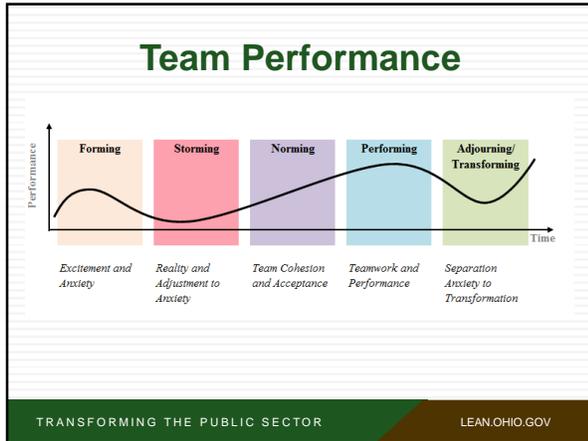
- Is the process owner – can make the decision to implement changes
- Helps remove barriers
- Helps provide resources (time, SME's, etc.)
- Needs to be kept in the communication loop

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Do you need a Facilitator?

- Do you have a large project? Does it cross multiple sections or units or departments?
- Do you have a large team?
- Is the topic potentially controversial?
- Is this your first improvement project?
- Do you need group management expertise?
- Do you need process and tools expertise?

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- ### Team Management Lessons Learned
- Form Ground Rules
 - Only meet if needed
 - Agenda
 - Distribute Pre-work before meeting
 - Start on time – End on time
 - Create Team Name
 - Listen
 - Action Registries
 - Provide Minutes
- TRANSFORMING THE PUBLIC SECTOR LEAN.OHIO.GOV

Meeting Management: Agendas

TIME	TOPIC	OUTCOME	WHO AND/OR HOW
10 min	Check-in, review agenda	Ready for work!	Leader
10 min	Review pre-work	Informed	Jim-Bob
20 min	Discussion of XXX	Decision	Sam/Force-field analysis
10 min	Brain storming on YYYYY	Ideas for solution	Jane
5 min	Next Steps	Assignments	Leader/Action register
5 min	Evaluate meeting	Improvements	Leader Plus/Delta

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Meeting Management: Minutes

Team Meeting Minutes		
Meeting/Team Name:		
Date:	Time	
Attendees:		
TOPIC	DISCUSSION	DECISIONS/ ACTION ITEMS

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Team Meeting Guidelines

- Ask "What is the desired Outcome?"
- Use the pre-work in the meeting
- Involve each participant in actions
- Create a "Parking Lot"
- Save the last 5 minutes for a meeting recap and next steps

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Team Conflict Resolution

- Acknowledge and clarify the conflict
- Discuss the impact, agree to cooperate communicate and reach a solution
- Ask for or suggest alternatives
- Together come to some resolution
- Be direct, factual, and sincere
- Actively listen
- Assume that both sides mean well



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Successful Team Tips

- Ground rules
- Clear team goals
- Improvement plan
- Defined roles
- Communication
- Respectful team behavior
- Clear decision-making procedures
- Equal participation



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LEAN Ohio
BOOT CAMP

Measures of Success
Day 5: Module 2

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Project Goals

1. Eliminate data quality errors in the "application review through grant award" timeframe
2. Reduce the amount of time between receipt of Final Performance Report and Grant close-out
3. Achieve maximum customer understanding of programs and components



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Were they successful?

Major Changes:

- Reduced process lead time by 58% from 297 to 125 days
- Cost Saving to Ohio customers of \$84,000
- Cost Savings to State of \$475,417

Measure	Before	Projected After	Difference
Process Steps	240	67	72%
Decisions	26	4	85%
Loopbacks	14	3	79%

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Scorecard

Measure	Current Level	NEW	Change
Work Flows	4	1	75%
Process Steps	183	26	86%
Decision Points	39	5	87%
Handoffs	29	6	79%
Loopbacks	10	2	80%
Delays	11	2	82%
Waste Points	54	5	91%
Process Lead Time	19-51 Days	4.5-10 Days	76% - 80%

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SIMPLER

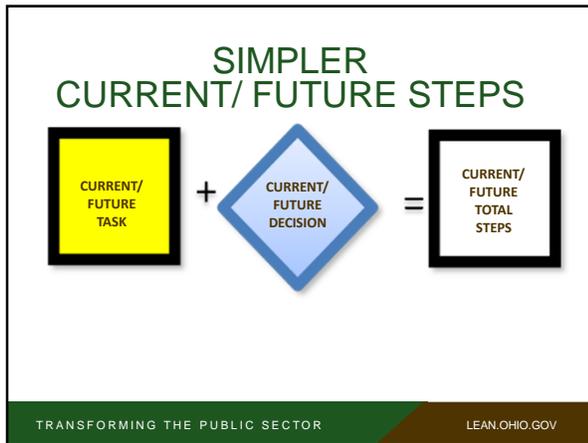
How many steps are in this process?

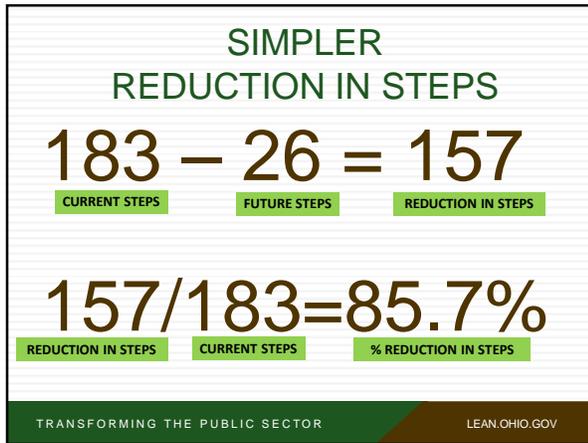
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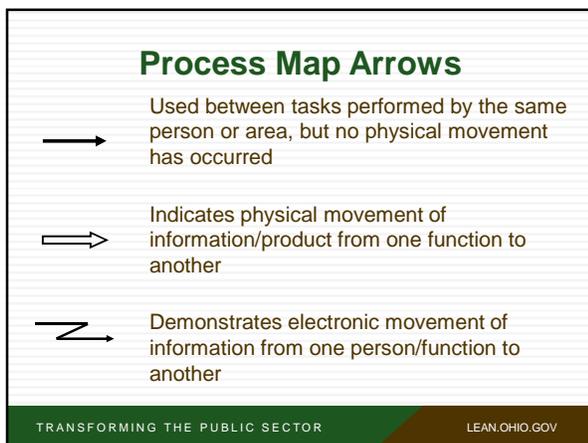
Process Map Key

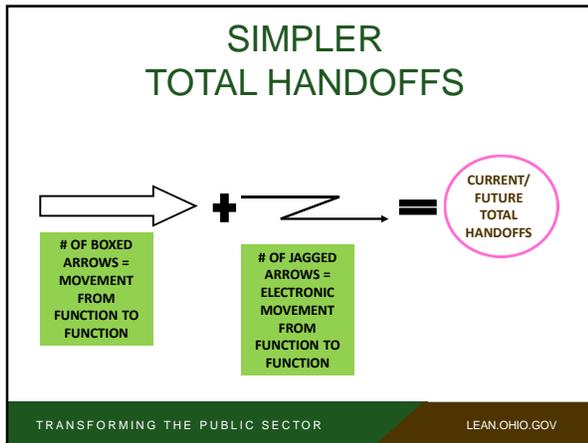
- Function**
 Different functions of the process
- Beginning & End Points**
 Beginning and end points of the process
- Task**
 Any task / activity where work is performed
- Inspect & Decision**
 Places where information is checked against established criteria (standards) & decision made on what to do next
- Delay**
 Any time information is waiting before the next process or decision (i.e. in-baskets, out-baskets, waiting to be batched)

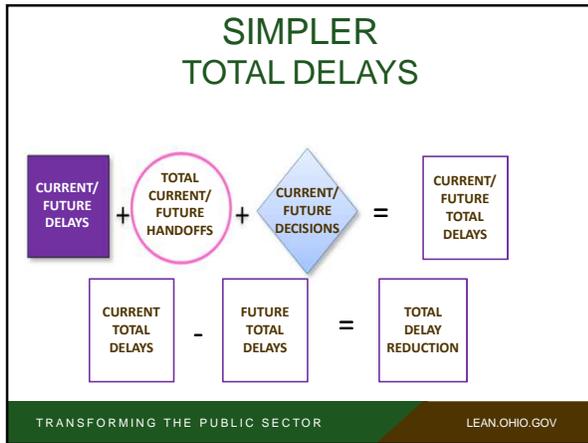
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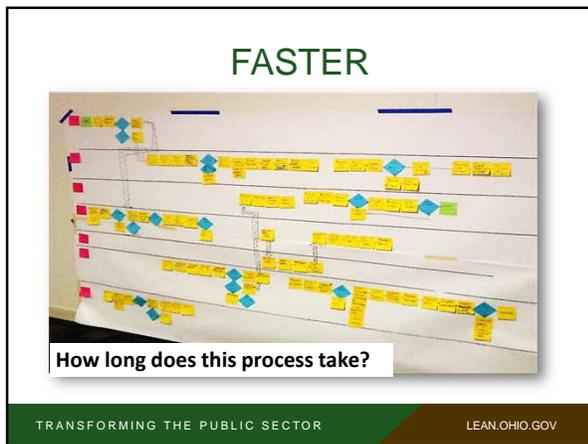












Lead Time

The time gap between when a customer request is placed for a product/service and when it is delivered. Lead times vary by process and may even vary for the same process in different situations, such as during renewal periods, seasonal demand, etc.

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Cycle Time

The time elapsed from the start to the end (one cycle) of an operation. It is the time taken to complete processing of a single unit of a product/transaction and includes the time consumed by all activities within the process area including product/service creation or transformation, transportation, and rework.

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Faster Lean/Cycle Time Reduction



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Faster Lean/Cycle Time Reduction

LEAD/CYCLE TIME REDUCTION / CURRENT STATE LEAD/CYCLE TIME = % LEAD/CYCLE TIME REDUCTION

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Better Communicating in English

- Ohio's state agencies will process purchase orders 77% faster, resulting in quicker delivery of commodities used for daily operations
- Energy Assistance Clients will receive credits for utility bills up to 12 weeks faster – keeping the lights on!
- Ohio mental health clients will now have better access to Health Home services to improve their care and quality of life

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Less Costly Caution

It is imperative that you document how cost savings were calculated. Also, share your findings with the leadership team and/or finance area before you report-out.

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Less Costly Potential Savings

PAPER
REDUCTION

×

.04

=

\$

OVER-
TIME
HOURS

×

COST PER
HOUR

=

\$

STORAGE
of SQ FT or
BOXES

×

COST PER
SQ FT or BOX

=

\$

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Less Costly Additional Cost Savings

Travel time for employees or customers

- 2012 Recruitment Kaizen Event saved each customer an average of \$762 due to reduction in travel to main office
- 2014 Field Review Kaizen Event saved the agency over \$20,000 a year

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Less Costly

Redirected hours - Reduction in CYCLE time contributes to hours being redirected to do mission critical work

- In 2012, Ohio Department of Transportation employees redesigned their process so they could spend more time working on fixing roads and other critical needs
 - Redirected 475,000 staff hours to more productive maintenance work
 - Reduced duplication of paperwork by 60%

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SIMPLER. FASTER. BETTER. LESS COSTLY

LEAN Ohio results from January 2011 - October 2013:

- More than 160 improvement projects
- More than 50 week-long Kaizen events
- On average, process time and process steps reduced by more than 50%
- Certified over 350 people with Yellow, Camo, Green and Black Belts
- Reduced by millions of hours the cumulative time that citizens and businesses spend waiting on government
- More than \$150 million projected annual savings to date

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Measure what matters!

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Voice of the Customer

- Easier access – less time dealing with government bureaucracy
- Reduction in wait time – getting their service sooner
- Meeting customer needs and expectations
- Increased satisfaction

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Voice of the Employee

- Redirect staff time to other projects
- The work process becomes more efficient – saving staff time
- Better morale
- Better use of staff skills

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Voice of the Process

- Reduction of tasks, decisions, functions
- Direct savings – reduction in overtime, office supplies, rent, travel costs, postage, equipment
- Fewer handoffs, loop backs, defects
- Reduction in cycle time, lead time

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Voice of the Business

- Cost avoidance – won't need to hire additional staff/ won't need layoffs (unemployment costs)
- Direct savings – reduction in overtime, office supplies, rent, travel costs, postage, equipment
- Redirect staff time to other projects
- Benchmark best practices

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Think Basketball: Do You Know the Score!

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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
- Uses charts to tell stories, evaluate alternatives, understand trends or find-out if everything is normal

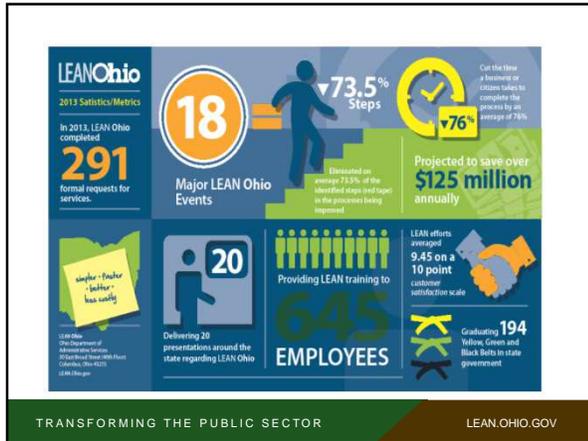
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LEAN Ohio Dashboard

SIMPLER • FASTER • BETTER • LESS COSTLY

Topic	This Month (Sept.)	2013 to Date	2013 Annual Goals	Status	Total Since 1/1/11
Major Kaizen Events/ 3P's facilitated by DAS:	2	14	12	ahead	41
Average percent of process steps eliminated:	N/A	73.7%	50%	ahead	58%
Percent lead time in processes reduced:	N/A	80.1%	50%	ahead	52%
Paper reduction / office supply cost savings:			New	N/A	
Total projected cost savings:	N/A	\$125M	\$10M	ahead	\$151M
Kaizen event follow-up meetings facilitated:	3	23	25	on target	57
Total requests for services completed by Lean Ohio:	38	217	150	ahead	337
Other improvement events using Lean tools:	7	33	40	on target	53
Number of miscellaneous meetings facilitated:	6	37	20	ahead	51
Number of Lean Ohio presentations given:	2	13	6	ahead	20
Customer Satisfaction Ratings (1-10 scale)	N/A	9.45	8/10	ahead	9.4
Lean Six Sigma training courses completed:	3	18	9	on target	33
Number of employees attending:	117	337	250	ahead	527
Number V/G/B Belts or Lean Certified graduated:	43	85	75	ahead	153
Kaizen events in agencies completed by graduates	0	5	6	on target	7
Other internal improvement efforts by graduates	13	43	80	behind	89
Total major Lean Events completed state-wide:	2	19	18	on target	52
Total improvement efforts completed state-wide:	22	93	130	on target	181
Total hours eliminated from state processes:			NEW	N/A	
Time no longer spent waiting on government:	Hours:	4,767,965,126			(544,288 years)

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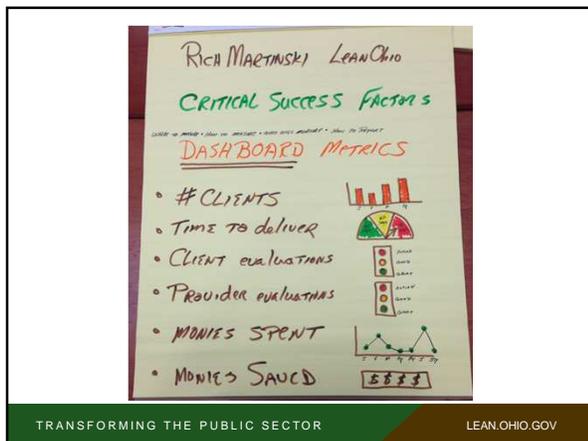


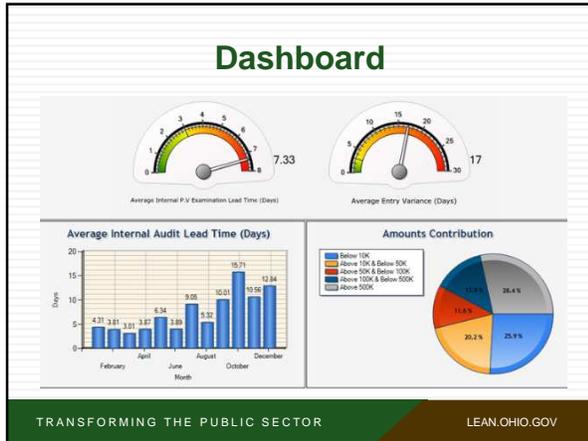
Why Create a Dashboard

- Why Create a Dashboard?
 - Dashboards show a high-level overview of the organization 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

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"A Picture is Worth a Thousand Words"

- A complex idea can be conveyed with just a single still image
- Visualization makes it possible to absorb large amounts of data quickly

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Tell Your Story



Tom Mello
Manager
Ohio Rehabilitation Services Commission

BLACK BELT
Black Belt Gov Wave IA

Click here for Tom Mello's Black Belt Project Presentation: Medical Contractor Pay Process

Tom Mello is a manager in RSC's Division of Disability Determination. He has been employed by RSC since 1992 and has worked in Case Operations, IT, and Medical Operations. He also oversees the Cooperative Disability Investigations Unit, which works in partnership with SSA and OIG.

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<http://leanohionetwork.org/join/>

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Change Management
Day 5: Module 3

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The Road of Change
All improvements require change



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50 Reasons Not To Change



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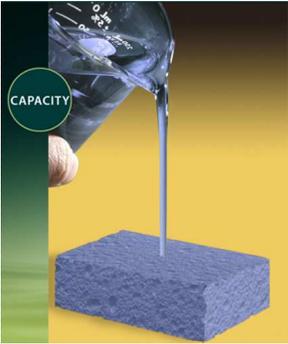
Change Definition

- The act, process or result of altering:
 - People
 - Processes
 - Strategy
 - Structure
 - Metrics / Rewards

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capacity for change

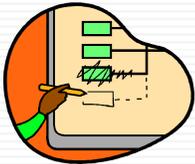
As change leaders we need to promote an understanding of not only what will change, but what will remain the same. Individuals can only tolerate a certain amount of change at once.



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Three Levels of Change

- **First Order Change**
 - Incremental changes within accepted frames
 - Minor improvement
 - No change in core processes
 - Reversible change
 - Logical and rational



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Second Order Change

- Change in systems
- Breakthroughs of large magnitude
- Revolutionary leap frog jumps
- Irreversible change
- New paradigms/ out of the box thinking



A cartoon illustration of a green frog wearing a black top hat, standing on a blue vertical line. The frog has its mouth open as if shouting, with the words "TA DAH!" written above its head. The frog is positioned to the right of the bulleted list.

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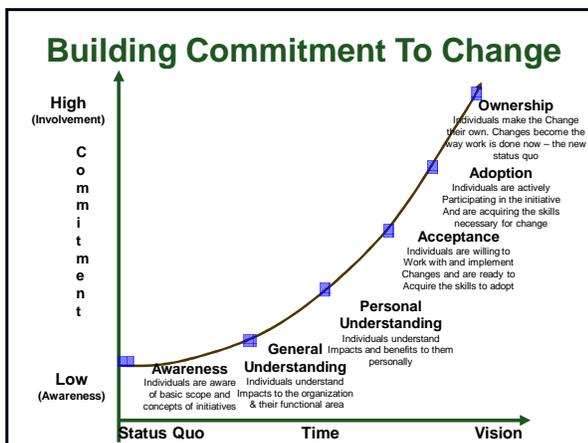
Breakthrough Change

- All managerial activity is directed at either *breakthrough* or *control*
- A dynamic, decisive movement to a new higher level of performance
- Transformation



An illustration showing a monarch caterpillar on the left and a monarch butterfly on the right, representing a transformation. The caterpillar is black and orange with white spots, and the butterfly is orange with black and white spots.

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Building Commitment to Change

- Critical Improvement approvals
 - Project idea approval
 - Solution approval
 - Implementation plan approval
 - Solution leveraged to other locations

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Selling Your Solution

- Increases odds of getting the solution approved by change sponsor and implemented.
- Increase odds of staff supporting implementation of the change

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You, the person with the great idea

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The people you need to convince

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Selling Your Idea

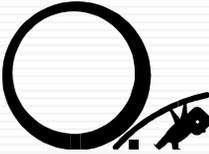
1. YOU
2. WHY
3. HOW



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The Why: the "Wedge"

- Causes you to let go of the past
- Explains challenges/problems that exist today that require change
- Problem statement
- Don't forget to "honor the past"



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The Why: The Magnet

- Attracts you to future improved state or vision
- Explain opportunities that lie ahead when you reach your project goal
- Opportunity statement



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Purpose of Resistors Is...



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Embracing Resistance

- Resistance is a form of **feedback** from people who often **know more** about day-to-day operations

Dismissing that feedback:

- Deprives you of valuable information
- Costs you goodwill
- Jeopardizes important relationships

- If you **embrace** resistance, you can use it as a resource and *find your way to a better solution*

Resistance Helps Change Your Change!

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Phases of Buy-In



WEAK

Seek Agreement:

1. On the problem
2. On the direction of the solution
3. That the solution actually solves the problem
4. That the solution will not lead to significant side effects
5. On how to overcome obstacles that might block the implementation
6. To implement

STRONG

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WIIFM & Burning Platform

Visualize *in advance* how your change affects their:

- Goals
- Major initiatives
- Biggest Challenges
- Budget/timing
- Use of their major resources/assets
- Other options to achieve same change



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Five I's for overcoming resistance

1. Incentives –
2. Information –
3. Intervention –
4. Indoctrination
5. Involvement –

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Communication Plan

Message <i>(inform, persuade, empower)</i> WHAT and WHY	Audience	Media <i>(written, events, one-on-one, etc.)</i>	Who is responsible	When / Where

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Tool: Force Field Analysis

- Brainstorm a list of forces that will help implement the proposed change (Driving forces)
- For each driving force, list a Restraining Force that will work against implementation
- Analyze the diagram to understand the areas you can influence
- Plan and take appropriate action

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8 Mantras of Change Leadership

1. ALL change involves loss for change targets
2. Resistance is natural – Anticipate and Expect It
3. If you do not get resistance, the change is not big enough
4. Resistance doesn't always show its face – Find It
5. Resistance has many motivations–Understand It (maybe just ignorance)
6. Deal with people's concerns vs. arguments – Confront It
7. There's no one way to deal with resistance – Manage It
8. Overcome resistance with 5 I's (Incentives, Information, Intervention, Indoctrination, and Involvement)

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Lean Routine
Day 5 Module 4

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Lean Project Flow

Preparation	Level Setting	Current State: Make the Invisible Visible	Improvement Design	Implement and Action	Control and Sustain
Scoping and SIPOC	Team Formation	Current Process Map	Brainstorming and Evaluation	Implementation Plans - Action Registries	Reporting - Celebration
Project Charter	Consensus on Project Charter and SIPOC	Identification of Waste	Lean Principles in Process Design	Poka-Yoke	Project Management
Identify Team	Review Baseline Data	Identification of VA, NVA, NVAN	Clean Sheet Redesign	Visual Management - Dashboard	Change Management
Data Collection Plan (Baseline Data)	Data Analysis	Analysis of Current State	Future State	Project Savings	Monitoring and Follow-up

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Lean Routine

- In essence – Lean Routine is taking elements employed in a Kaizen and/or other Lean Tools and using them (with proper facilitation and discretion) on smaller sub-processes

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What is a Lean Routine

- Lean Routine is a quick hitter
- It is grass roots in nature
- It is meant to be used on sub-processes and pain or 'pinch' points
- Works best when you have control over entire process
- Should be conducted by those doing the process

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Scoping a Lean Routine

- Pick a small part of a process that is a pain point, not the entire complex process (a sub-process)
- 8-15 steps
- 2-4 swim lanes
- Select a part of the process that is in your or your small team's control

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Lean Routine

- Lean Routines are **Flexible** - If scoped correctly they can be completed in:
 - One Day
 - OR....Five Meetings
 - OR....Two and ½ Meetings
 - OR.....you get the idea.



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Lean Routine Warning

- Lean Routines should **not** be used with large, complex processes that cross many sections or agencies (that is why we have Kaizens)

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Lean Routine Tips

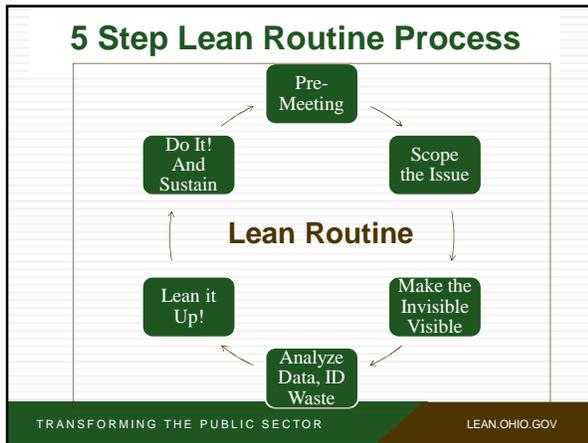
- Lean Routines require flexibility
- Lean Routines require planning and follow-up
- Lean routines may need an experienced facilitator
- Lean Routines may require level setting with every meeting
- Team make-up should mirror actual process
- Lean Routines still need to be scoped and chartered appropriately

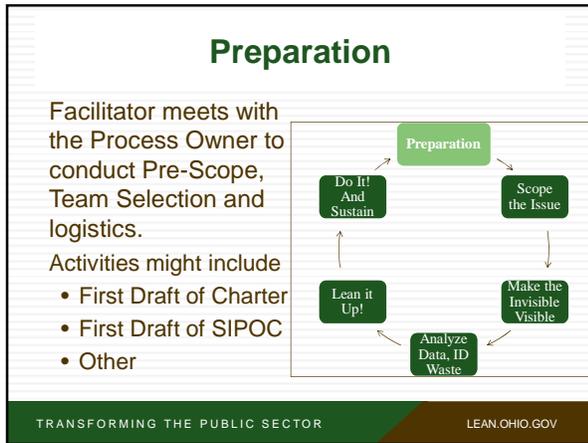
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Lean Routines – Why they are GREAT!

- The more you do the better they get (less training need)
- More flexible for time commitments
- Can look at one sub-process several times
- Easier for management to approve
- Gives time to collect and analyze data
- Provides Quick Wins

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Step by Step: Step Two

Step Two: Make the process visible and gather data such as lead time, cycle times, error rates, costs, etc. for those steps identified. Tools to use:

- Process Mapping
- Data Collection Plan
- 5S
- Other

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Step by Step: Step Three

Step Three: Analyze Data, ID Waste, and non-value added activities

- TIMUWOOD
- VA-NVA-NVAN
- Root Cause Analysis
- Brainstorming
- Other

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Step by Step: Four

Step Four: Lean it Up

- Clean Sheet Redesign
- Poka Yoke
- Standard Work
- 5S
- Other

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Step by Step: Step Five

Step Five: Just Do It! and sustain the improvements

- Gantt Chart
- Action Registries
- Training and Communication plans
- Monitoring Plan
- Project Management
- Other

```
graph TD; Prep[Preparation] --> Scope[Scope the Issue]; Scope --> Make[Make the Invisible Visible]; Make --> Analyze[Analyze Data, ID Waste]; Analyze --> Lean[Lean it Up!]; Lean --> StepFive[Step Five: Do It! And Sustain]; StepFive --> Prep;
```

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5 Step Lean Routine Process

```
graph TD; Prep[Preparation] --> Scope[Scope the Issue]; Scope --> Make[Make the Invisible Visible]; Make --> Analyze[Analyze Data, ID Waste]; Analyze --> Lean[Lean it Up!]; Lean --> Prep;
```

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Questions on Lean Routine?

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LEAN Ohio
BOOT CAMP

Taking Lean Back to Your Workplace
Day 5 Module 5

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Where are we headed?

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World Class Government

- Lean, agile and connected to actual constituent demands
- Responsive to constituent needs for new programs and services
- Improving continuously to enhance stakeholder value
- Transforming culture to sustain improvements



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Step 1

Learn and test the effectiveness of *Lean Manufacturing* to improve state government systems

Do not invest in fads

A team of state employees work with business experts to learn and experiment with Lean Six Sigma tools and principles to determine their effectiveness improving government services

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Step 2

Focus preliminary Lean efforts on major top-down improvement events to ensure significant results

Selling results is easier than selling theory

Select high-opportunity projects and champions that will do what it takes to succeed, and accumulate a variety of significant, transformative results throughout state government

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Step 3

Communicate and celebrate those first tangible results to increase interest and demand for Lean

If you improve it, they will come

Use web site, articles, and meetings to share results, and recognize and reward excellence

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Step 4

Develop additional practitioners to meet the increased demand for Lean efforts

Matching supply and demand

As more people and agencies wish to use Lean, increase capacity by developing a variety of opportunities for training, mentoring and gaining experience – both within the Lean Ohio Office and interested agencies

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Step 5

Ensure major improvement efforts are prioritized, aligned, and managed with appropriate visual metrics

From random projects to aligned system improvements

Widen focus to include strategic planning, understanding and improving systems through value stream mapping, creating efficient processes the first time and visual management systems to better ensure complete success

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Step 6

Support opportunities for greater use of Lean tools by everyone

Push Lean down and out

Promote bottom-up improvement efforts so everyone is improving all the time – not just on Kaizen events, and ensure new Lean champions in all agencies have support from experienced practitioners

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What can I do on my own?

- The Lean tools and approach can be applied anywhere
- Start with your own processes – ones that you control, that you can change
- You can gather customer information, map the process, collect data, 5S your workspace, Poka Yoke your forms....
- Demonstrate your success to others

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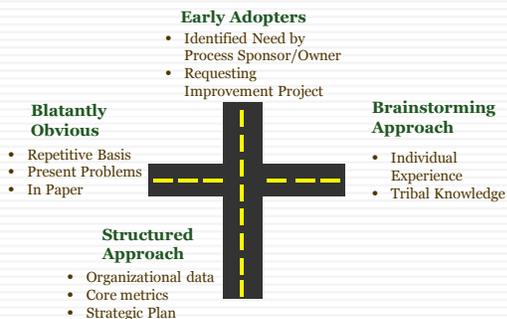
Kinds of Improvement Projects

- Kaizen Events
- Lean Routine
- Lean Daily
- DMAIC
- 5S plus Safety
- Voice of the Customer
- Data Collection
- Poka-Yoke (mistake proofing)
- Implementing a measurement system

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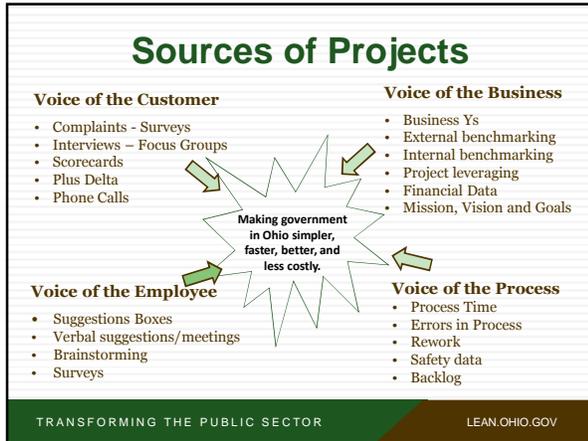
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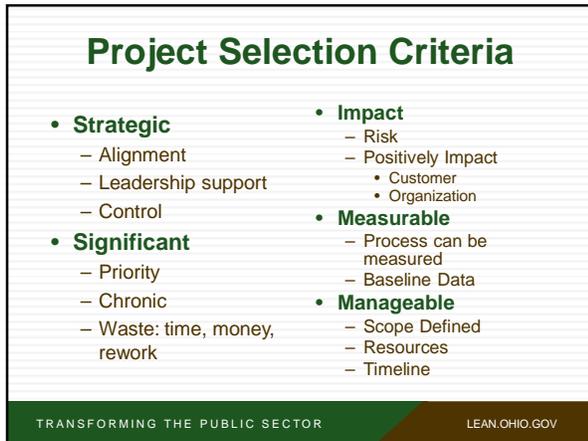
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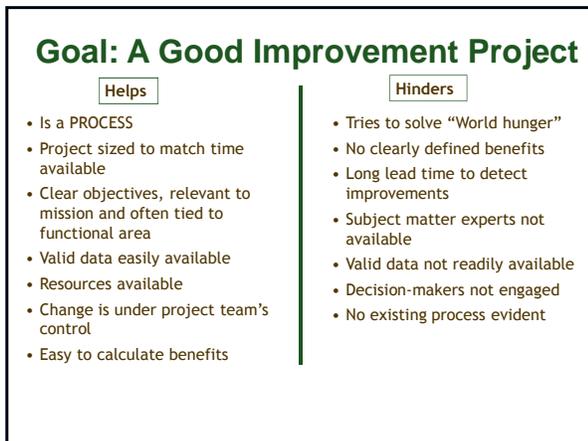


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Things to Remember

- Do not start with a solution
- Don't jump to solutions
- Hold the reins
- If you already know the answer, just do it!
- Trust the Lean process



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