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TRANSFORMING
the PUBLIC SECTOR
WELCOME AND INTRODUCTIONS

Introduce yourself

• Name
• Where you work
• What you do
• Any experience with Lean/Six Sigma/Quality Improvement
• First or most interesting job
As with any group session, it is a good idea to establish, state, and agree to the ground rules we will adhere to in the session. Here are the ground rules we have established:

- Everyone Participates
- Engage in Open and Honest Dialogue
- Respect the Opinions of Others
- Work to Build Consensus
- Suspend Judgment/Blameless Environment
- Leave Rank at the Door

Can you think of any others?

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Help Us to be Mindful

As with any group session, it is a good idea to establish, state, and agree to the ground rules we will adhere to in the session. Here are the ground rules we have established:

• Silence Your Cell Phones
• Interruptions to a Minimum
• Be on Time
• Stretch
• Always Snack Time!
• Dress Code
• Schedule/Breaks/Lunch

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<table>
<thead>
<tr>
<th>Before Boot Camp</th>
<th>After Boot Camp</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Lean and Six Sigma</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>b. Using data to make informed decisions</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>c. Operational Definitions</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>d. SIPOC</td>
<td>0 0 0 0 0</td>
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<tr>
<td>e. 6S</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>f. Process Map</td>
<td>0 0 0 0 0</td>
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<tr>
<td>g. Poka Yoke</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>h. Data Collection</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>i. Standard Work</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>j. Clean Sheet Redesign</td>
<td>0 0 0 0 0</td>
</tr>
<tr>
<td>k. Implementing Lean</td>
<td>0 0 0 0 0</td>
</tr>
</tbody>
</table>

Rate your knowledge of each item: 1 = little to no knowledge 2 = some knowledge 3 = some knowledge and application 4 = considerable knowledge and application 5 = great knowledge and application.
90’s

Quality Services through Partnership (QsTP)

DAS Office of Accountability & Results begins facilitating Kaizen events

2000’s

DAS Office of Accountability & Results becomes LeanOhio

Cintas Corporation invited to brief cabinet on LSS concepts

2011 - 2013

120 state employees trained in LSS

Average reduction in overall process steps is 52%
2014 - 2015

- LeanLocal launched with $4.6 million available to local entities and learning and improvement projects.
- LeanOhio launches Boot Camp training and introduces the Camo Belt.
- LeanOhio becomes one of the 1st state govt to launch own Black Belt training.
- LeanOhio facilitates 50th Kaizen event.

2016 - 2017

- Over 500 state employees trained in LSS.
- > 500,000 staff hours redirected to higher priority efforts that improve customer service.
- LeanOhio launches LLDP.
- LeanOhio partners with OSU Center of Operational Excellence.
- Average reduction in overall process time is 67% and > 10,000 process steps eliminated.

2018 - 2019

- LeanOhio facilitates 88th Kaizen event.
- > 1000 state employees trained in LSS.
- > 10,376 days reduced in start-to-finish process time and more than 1 million redirected hours.
- LeanOhio provides online training opportunities.
- LeanOhio Joins the American Society for Quality (ASQ).
- Develops partnerships with Governor’s Office initiatives.
4 Day Boot Camp

DAY ONE
Introduction, Overview and Basic Principles

DAY TWO
Understand the Situation, Making the Invisible Visible

DAY THREE
Analyze and Improve

DAY FOUR
Implement and Monitor

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DAY ONE

Introduction, Overview and Basic Principles

Lean Six Sigma Intro/ Overview
Pre-Assessment
Four Voices
PDCA
SIPOC – Introduction to scoping
Project Charter
Project Selection

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DAY TWO

Understand the Situation, Making the Invisible Visible

Teams and Team Dynamics
Process Mapping
Metrics and Data Collection
Identifying Waste
Value Add/Non-value Add
Root Cause Analysis
Fishbone (Ishikawa) Diagram
5S

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Analyze and Improve

Poka-Yoke
Pareto Diagram
Lean Tools: One Piece Flow, Standard Work, Pull, Kanban
Brainstorming/Affinity Diagram
Impact/Control Matrix
Clean Sheet Redesign

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Implement and Monitor

Making the Future State Happen
Implementation Plans and Tools
Round 2 DOP Simulation
Measures of Success
Taking Lean Back to your Workplace
Show What You Know
Managing Change

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3 ZONES

1. Comfort
2. Learning
3. Panic

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EXPECTATIONS

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VIDEO:
Fable of Complexity
WHAT ARE LEAN AND SIX SIGMA?
EVERYTHING IS A PROCESS

“If you can't describe what you are doing as a process, you don't know what you're doing.”

W. Edwards Deming

INPUTS

People
Equipment
Materials
Methods
Environment

PROCESSES

CUSTOMERS

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“A bad process will beat a good person every time”

W. Edwards Deming

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PROCESSES TEND TO BE INVISIBLE

Point A: REQUEST

Point B: RESOLUTION

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IN MANUFACTURING OR GOVERNMENT

whatever your results...

• Lead time
• Cycle time
• Errors
• Costs
• Rework
• Customer satisfaction or frustration

…..your process is perfectly designed to achieve those results
LEAN

A Systematic Approach to identifying and eliminating waste through:

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

Originated with the Toyota Production System (TPS) in the 1990’s

Lean focuses on speed without sacrificing quality for the customer

Lean is a way of working where everyone is maximizing customer value while minimizing waste everyday

Lean Enterprise Institute

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LEAN PILLARS AND PRINCIPLES

Pillars:
- Pursuit of continuous improvement
- Philosophy of respect for people

Principles:
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 the customer pull what they want
6. Pursue perfection
7. Eliminate or reduce variation (variation is evil)
Lean shines a spotlight on the waste and seeks to eliminate or reduce waste through:

- **Teamwork** with employees who participate in the decisions that impact their function
- **Clean, organized, and well-marked work spaces**
- **Flow** systems
- **Pull** systems
- **Reduced lead times** through more efficient processing, set-ups and scheduling

American Society for Quality

www.asq.org
LeanOhio promotes government that is:

- Simpler
- Better
- Faster
- Less Costly

“Lean Takes Time”  Have to slow down to speed up
SIX SIGMA: $6\sigma$

**Origin**
Motorola, USA 1986

**Minimize variability**
-Lean Principle

**99% vs. 99.99966%**

$1,000,000 \times 99\% = 10,000$

$1,000,000 \times 99.99966\% = 3.4$

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SIX SIGMA: 6σ

Standard Bell Curve

Population n = sample size
Standard Curve = where data lands
\( \mu = \text{Mean (middle)} \)
SIX SIGMA: $6\sigma$

No Electricity 7 hrs Each Month

1hr w/o Electricity Every 34 years

99 % Good

99.9966% Six Sigma

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SIX SIGMA: $6\sigma$

200,000 Wrong Rx/year

99% Good

68 Wrong Rx/year

99.99966% Six Sigma

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SIX SIGMA: $6\sigma$

2 Bad Landings Per Airport Daily

99% Good

One Bad Landing Per Airport Yearly

99.99966% Six Sigma

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Process improvement requires aspects of both Lean and Six Sigma approaches. Both are:

- Customer focused
- Quality focused
- Require strong management support
- Data driven decisions
- Proven continuous improvement methods
# LEAN AND SIX SIGMA

<table>
<thead>
<tr>
<th>Lean</th>
<th>Six Sigma</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDCA Methodology</td>
<td>DMAIC Methodology</td>
</tr>
<tr>
<td>Reduce Time and Waste</td>
<td>Reduce Defects and Variation</td>
</tr>
<tr>
<td>Reduce cycle time and bottlenecks, increase flow and pull</td>
<td>Six Sigma Goal: 3.4 Defects per million opportunities</td>
</tr>
<tr>
<td>Process Mapping, 5S and 7 Wastes – and more</td>
<td>Data and Analysis Tools – and more</td>
</tr>
<tr>
<td>Achieves goals by use of less technical tools such as 5S, workplace organizational and visual controls. (ASQ)</td>
<td>Achieves goals by use of statistical data analysis, design of experiments and hypothesis testing. (ASQ)</td>
</tr>
<tr>
<td>Camo Belts</td>
<td>Green Belts, Black Belts</td>
</tr>
</tbody>
</table>

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HISTORY OF CONTINUOUS IMPROVEMENT
HISTORY OF CONTINUOUS IMPROVEMENT

1793
Eli Whitney

1800s
Carl Frederick Gauss

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HISTORY OF CONTINUOUS IMPROVEMENT

1901
Henry Ford

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HISTORY OF CONTINUOUS IMPROVEMENT

1940s

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HISTORY OF CONTINUOUS IMPROVEMENT

1950s

Joseph M. Juran & W. Edwards Deming

1970s

Toyota

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HISTORY OF CONTINUOUS IMPROVEMENT

1980s
Six Sigma

1990s
Black Belt

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HISTORY OF CONTINUOUS IMPROVEMENT

2000s

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W. EDWARDS DEMING

1900 – 1993 Father of the Modern Quality Movement

WALTER SHEWHART

1891 – 1967 Father of Statistical Quality Control, PDCA

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JOSEPH M. JURAN

1904 – 2008
Cost of Quality

PHILLIP CROSBY

1926 – 2001
Do it Right the First Time

KAOURU ISHIKAWA

1915 – 1989
Father of Japanese Quality
PROCESS
IMPROVEMENT
**PDCA**

**ACT**
Adopt, Adapt, or Abandon

**CHECK**
Check the results of your test; Record improvement metrics

**PLAN**
Define and analyze problem; Develop solution

**DO**
Plan and test solution
PROCESS IMPROVEMENT ACTIVITY: CARD GAME

- Team Leader
- Time Keeper
- Recorder

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## PROCESS IMPROVEMENT ACTIVITY: CARD GAME

<table>
<thead>
<tr>
<th>Time Sheet</th>
<th>L</th>
<th>E</th>
<th>A</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round #1: Goal Time</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Round #2: Goal Time</td>
<td></td>
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<tr>
<td>Round #3: Goal Time</td>
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</tr>
<tr>
<td>Round #4: Goal Time</td>
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</tr>
</tbody>
</table>

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PDCA

1. Identify and Select Problem
2. Define Current State
3. Define Desired State
4. Analyze
5. Select Solution to test
6. Plan and Test Solution
7. Improvement Metrics
8. Check Results
9. Adopt, Adapt or Abandon Follow-up Monitor

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P1: IDENTIFY & SELECT PROBLEM

• Find a problem or opportunity
• Review background information
  • How do you know it is a problem?
• Identify why change is needed
  • What are the customers saying?
  • What are their needs and expectations?
• Scope the improvement project
  • Develop a SIPOC
  • Develop a Charter
P2: DEFINE THE CURRENT STATE

• Understand the process
• Make the invisible visible
• What are the metrics?
• What is it costing us in time/dollars/staff?
• What is the impact on our customers?

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P3. DEFINE GOALS/TARGET CONDITION

• What is the aim?
• Identify goals.
• Make them SMART!
• What is the gap?
• What are the important aspects of the future target condition?
• Benefits of moving to the future target condition?
P4. ANALYZE

- What is causing the problem(s)?
- What factors account for the gap between the current state and the goal?
- What does the data say?
- What is the root cause?

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P5: GENERATE POTENTIAL SOLUTIONS

- Review information
- Ensure understanding of causes
- Brainstorm potential solutions
- Evaluate and select solution
- Develop an improvement hypothesis: If we do ____ , then we think _____ will happen
D6: TEST YOUR CHANGE

- Develop an action plan to test your improvement theory (hypothesis)
- Implement your plan
- Collect data using key measures
C7 & C8: RECORD IMPROVEMENT METRICS AND CHECK RESULTS

• Evaluate your test data
• Did your hypothesis produce the desired result?
• Ask those affected by the change how it’s working
• Refine your improvement as needed
A9: FOLLOW-UP ACTION

- If successful: Implement system-wide, standardize
- If not successful: Try another test solution or
- Start the cycle again
- Repeat cycle as necessary
- Continuously measure
- Plan for the future
REPEAT FOR CONTINUOUS IMPROVEMENT

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<table>
<thead>
<tr>
<th><strong>PLAN</strong></th>
<th><strong>DO</strong></th>
<th><strong>CHECK/ METRICS</strong></th>
<th><strong>ACT</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>P1</strong></td>
<td><strong>P1</strong></td>
<td><strong>P1</strong></td>
<td><strong>P1</strong></td>
</tr>
<tr>
<td><strong>P2</strong></td>
<td><strong>P2</strong></td>
<td><strong>P2</strong></td>
<td><strong>P2</strong></td>
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<tr>
<td><strong>P3</strong></td>
<td><strong>P3</strong></td>
<td><strong>P3</strong></td>
<td><strong>P3</strong></td>
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<tr>
<td><strong>P4</strong></td>
<td><strong>P4</strong></td>
<td><strong>P4</strong></td>
<td><strong>P4</strong></td>
</tr>
<tr>
<td><strong>P5</strong></td>
<td><strong>P5</strong></td>
<td><strong>P5</strong></td>
<td><strong>P5</strong></td>
</tr>
</tbody>
</table>

**PDCA**

**PLAN**

**P1**
- **Identify Problem** (problem selection guide)
- **Gather data and background** (How do you know it is a problem?) What, When, Where, How much
- **Scope the issue**: Develop SIPOC; Identify customer requirements (survey, focus group, interviews)
- **Develop charter/ start A3**

**P2**
- **Determine current state** (background and measures)
- **Develop Data Collection Plan and gather data**
- **GEMBA** – go observe the process in the workplace. Develop a Process Map
- **Identify waste** (TIM U WOOD) and pain points

**P3**
- **Establish target goals/future/desired state**
- **What measures will tell you if you are successful?**
- **Make goals SMART**

**P4**
- **Analyze the situation**
- **Examine the data**, Understand the causes of problem
- **Fishbone diagram, Pareto diagram, Run chart, bar chart**
- **Find the Root cause of the problem, 5 Whys**

**P5**
- **Determine best improvement(s)**
- **Brainstorm improvement ideas**, Evaluate (Impact/ control matrix)
- **Select improvement(s)** Use flow, poka yoke, standard work. Develop new process map
- **State a hypothesis**: If we do XXXX, then we think YYYY will happen

**DO**

**P1**
- **Test your Improvement(s)**
- **Plan implementation of a test of the proposed solution.**
- **Implement test solution.**
- **Gather data to measure success**
- **Action register, Gantt chart**
- **Data collection tools**

**CHECK/ METRICS**

**P1**
- **Check/study the results of your test**
- **Evaluate results**: Compare before and after measures
- **Seek feedback from customers**
- **Determine if the actions taken were successful**

**ACT**

**P1**
- **Adopt, adapt or abandon. Monitor**
- **Tell your Story**
- **Implement standard work. OR test another solution**
- **Monitor**: Collect data & review periodically. Track results using visual management
- **Tell your story Complete the A3**
Video: Meals per Hour
# PDCA, A3, DMAIC

<table>
<thead>
<tr>
<th>PDCA</th>
<th>A3</th>
<th>DMAIC</th>
<th>TOOLS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Plan</strong></td>
<td>Identify the problem or opportunity for improvement</td>
<td>Clarify the problem</td>
<td>Define</td>
</tr>
<tr>
<td></td>
<td>Understand the current situation (background &amp; measure)</td>
<td>Break down the problem</td>
<td>Measure</td>
</tr>
<tr>
<td></td>
<td>Identify the goal and the gap</td>
<td>Set a target</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Analyse the situation (determine root cause)</td>
<td>Root cause analysis</td>
<td>Analyze</td>
</tr>
<tr>
<td></td>
<td>Identify potential solution(s), select solution to test. If we do — then — will happen</td>
<td>Develop counter measures</td>
<td></td>
</tr>
<tr>
<td><strong>Do</strong></td>
<td>Plan and implement a test of the proposed solution</td>
<td>Implement counter measures</td>
<td>Improve</td>
</tr>
<tr>
<td><strong>Check</strong></td>
<td>Study the results of the test</td>
<td>Evaluate results</td>
<td></td>
</tr>
<tr>
<td><strong>Act</strong></td>
<td>Act on lessons learned, adjust as needed, implement system-wide, Monitor</td>
<td>Standardize success, Monitor</td>
<td>Control</td>
</tr>
</tbody>
</table>
WHAT IS AN A3?

a. A way of thinking
b. A report
c. An 11 x 17 piece of paper
d. An approach to continuous improvement
e. All of the above
WHY A3?

• A3 provides a structured format for problem-solving
• Provides a method for addressing the things that “bug” you or frustrate you
• Reflects the philosophy of don’t blame the people, fix the process!
• Promotes continuous improvement
• Aligns with PDCA cycle
• Promotes transparency – is visual!
• Tells the story
<table>
<thead>
<tr>
<th></th>
<th>Title:</th>
<th>Date Started:</th>
<th>Current Date:</th>
<th>Team:</th>
<th>Sponsor:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>P1</strong>:</td>
<td>Background/Why change is needed</td>
<td></td>
<td></td>
<td></td>
<td><strong>C7</strong>: Improvement Metrics</td>
</tr>
<tr>
<td><strong>P2</strong>:</td>
<td>Current State</td>
<td></td>
<td></td>
<td></td>
<td><strong>C8</strong>: Check Results</td>
</tr>
<tr>
<td><strong>P3</strong>:</td>
<td>Project Goals</td>
<td></td>
<td></td>
<td></td>
<td><strong>A9</strong>: Follow-up and Monitoring</td>
</tr>
<tr>
<td><strong>P4</strong>:</td>
<td>Analyze</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>P5</strong>:</td>
<td>Potential Solutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>D6</strong>:</td>
<td>Action Plan &amp; Test</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title: Why change is needed</td>
<td>P4: Analysis</td>
<td>Team: Executive Sponsor:</td>
<td></td>
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<td>-------------------------</td>
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<td></td>
</tr>
<tr>
<td>Why are we working on this problem/opportunity? What is the business case? What is the pain point? What is the impact? Scope?</td>
<td>What is preventing achievement of the goal? What is the root cause or causes of the problem? Fishbone or 5 whys.</td>
<td>C7: Improvement Metrics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P2: Current State</td>
<td>P5: Potential Solutions</td>
<td>C8: Check Results</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is currently happening? Extent of the problem? Data. Statement of the problem. Graphically present a picture of the current state.</td>
<td>Brainstorm solutions. Analyze them. Select a solution to test.</td>
<td>What went well? What didn’t? If you didn’t achieve goal, then go back to test another solution. If goal is achieved, put into standard work.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What specific outcome is required? What is the goal? What is the gap? Specific improvements in performance needed? Pictures/graphs.</td>
<td>Develop an action plan for running your test (or pilot) and implement it.</td>
<td>What is the plan for ensuring that solution benefits are maintained? How will you monitor?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
VIDEO:
Lean: BCI
Crime Lab

PLAY TIME:
6 mins 59 sec
FOUR VOICES
To inform process improvement we need to listen to four voices

Voice of the Customer - VOC
Voice of the Business - VOB
Voice of the Process - VOP
Voice of the Employee - VOE
ACTIVITY: 4 VOICES

Your Movie Theater

You own a local movie theatre. You are going on vacation for 10 days. You have asked your theatre manager to email you 5 data items every other day.

What do you want to know?
<table>
<thead>
<tr>
<th>Owner Needs</th>
<th>Customer Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ticket Sales</td>
<td>• Line Movement</td>
</tr>
<tr>
<td>• Concession Sales</td>
<td>• Good Popcorn</td>
</tr>
<tr>
<td>• Income/Expenses/Profit</td>
<td>• Reasonably Priced Refreshments</td>
</tr>
<tr>
<td>• What movies came in</td>
<td>• Clean, Updated Restrooms</td>
</tr>
<tr>
<td>• Employee problems</td>
<td>• Ambiance/Décor</td>
</tr>
<tr>
<td>• Who called off</td>
<td>• Great Sound System</td>
</tr>
<tr>
<td>• Customer Issues</td>
<td>• Friendly &amp; Efficient Staff</td>
</tr>
<tr>
<td>• Weather</td>
<td>• Convenient Parking</td>
</tr>
</tbody>
</table>

Which group can you really influence and control?

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4 VOICES: VOICE OF THE CUSTOMER

Describes the stated and unstated needs or requirements of the customer.

- Identifies the Customer
- Needs
- Drivers
- Critical to Quality
- What they Don’t Want
- Meeting Expectations
- Exceeding Expectations

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Customer needs and expectations need to drive our improvement efforts.

These are usually stated in general terms and need to get translated to more measurable terms.

Customer: “I want a cup of coffee.”
What does that mean?
HOW DO WE KNOW WHAT CUSTOMERS WANT?

DATA. Capturing data from the Voice of the Customer (VOC) is especially important in Process Improvement

- Surveys
- Interviews
- Focus Groups
- Customer Complaints
- Benchmarking
- What others can you think of?

- Consider having your customers participate in an improvement project!

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VOICE OF THE CUSTOMER IS MULTIFACETED

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VOC CUSTOMER TRENDS

- Immediate feedback – close to the service
- Utilize social media
- Web utilization
- Raised expectations
- Want it faster
- Want it on-line
- Want it INSTANTLY
4 VOICES: VOICE OF THE BUSINESS

Describes the stated and unstated needs or requirements of the organization

- Vision
- Mission
- Values
- Financials
- Performance Metrics

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4 VOICES: VOICE OF THE PROCESS

Describes what the process is telling you

- What’s working
- What’s not working
- Process Data provides the voice – the information needed
4 VOICES: VOICE OF THE EMPLOYEE

Describes the front line knowledge and requirements of the employee.

- The people who do the work know the work best!
- Employees are closest to the Customer
- Lean principle of respect for people
- Set them up for Success
- Change can be difficult
- Empowering employees to make change promotes ownership of the work and creates a better place to work
VIDEO:
(VOC) Seinfeld Car Reservation

PLAY TIME:
1 mins 54 Sec
DoP APPLICATION SIMULATION

- Department of Prevention (DOP)
- DOP is a Government Organization
- DOP reviews applications from other Government Organizations

DOP Motto: Keeping bad things from happening.

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You will be working in the Application Processing Section. This Section receives applications from government organizations requesting permission to conduct process improvement activities. DOP processes two types of applications: Renewal and Initial. The section goals are to process applications as quickly and efficiently as possible without losing quality. The section must process 16 applications every day in order to meet customer demand and avoid a backlog.
• DOP needs to process 16 apps every day (8 min)
• Each DOP employee is required to work until the end of the day
• Every position has written instructions that must be followed
• Each DOP employee is responsible for getting their own materials
• Materials cannot be shared and must be transported in the authorized folders only
• Each folder can hold only two applications
DoP SIMULATION RULES

- Forms will be processed in batches of two
- Extra materials can be found in the Supply Area
- All DOP employees are responsible for moving their completed work to the next worker
- Folders cannot be moved across the table. All work must travel around the outside of the table
- Running is not permitted
- You are required to follow the written instructions
## DoP JOB ASSIGNMENTS

<table>
<thead>
<tr>
<th>JOB ASSIGNMENT</th>
<th>WORKSTATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail Opener</td>
<td>1</td>
</tr>
<tr>
<td>Renewal Processor</td>
<td>2</td>
</tr>
<tr>
<td>Initial Processor</td>
<td>3</td>
</tr>
<tr>
<td>Legal</td>
<td>4</td>
</tr>
<tr>
<td>Approver</td>
<td>5</td>
</tr>
<tr>
<td>Addressor</td>
<td>6</td>
</tr>
<tr>
<td>Mail Carrier</td>
<td>Mailroom</td>
</tr>
<tr>
<td>Senior Processor</td>
<td>Mailroom</td>
</tr>
<tr>
<td>Quality Assurance</td>
<td>Floating</td>
</tr>
</tbody>
</table>

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VIDEO:
SIPOC
SIPOC

High Level Tool: 50,000 foot view

Will help you gain a snapshot of the process:

- Suppliers
- Inputs
- Process
- Outputs
- Customers

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### SIPOC

<table>
<thead>
<tr>
<th>Suppliers</th>
<th>Inputs</th>
<th>Process</th>
<th>Outputs</th>
<th>Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals or organizations</td>
<td>Material, information and/or services that</td>
<td>The step by step method that produces the</td>
<td>Products, information, services and/or</td>
<td>Those who receive the process output, pay</td>
</tr>
<tr>
<td>that provide inputs to the</td>
<td>are required by the process to produce the</td>
<td>output, defined at a very high level - only</td>
<td>decisions that are produced by the process</td>
<td>for it or are directly impacted by the process</td>
</tr>
<tr>
<td>process.</td>
<td>outputs</td>
<td>5 to 7 steps</td>
<td></td>
<td>output</td>
</tr>
</tbody>
</table>

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SIPOC

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SIPOC: CHOCOLATE CHIP COOKIES

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SIPOC: DOP

Facilitation Tips

- 1 person facilitates and posts on the wall
- Facilitator asks the group questions and listens carefully to responses
- Check your and the groups’ understanding
- Make sure the group comes to consensus
- Write big enough for everyone to see (use sharpies)
PROJECT CHARTER
An authorizing document that defines the project and management support for the project.

- Background
- Opportunity
- Scope
- Measurable Outcomes
- Team Members
- Boundaries
- Project Sponsor(s)
# LEANOhio Project Charter

## Project Background

## Problem/Opportunity Statement

**SCOPE (DEFINE BOUNDARIES)**

- First step in the process:
- Last step in the process:

## Project Goals

## Project Boundaries

## Performance Metrics: What measures will tell you if you are successful.

<table>
<thead>
<tr>
<th>Performance Metric</th>
<th>Current</th>
<th>Goal</th>
<th>Final</th>
<th>% Change</th>
</tr>
</thead>
</table>

## Project Benefits

## Project Team

- **Team Lead:**
- **Team Champion/Sponsor:**
- **Process Owner:**
- **Team Members:**
- **Subject Matter Experts:**

**Project Champion/Sponsor and Process Owner Sign-Off:** I am committed to supporting this project and implementing the team's improvements.

**Sponsor Signature:**

**Process Owner:**
# PROJECT CHARTER

## Background and Project Opportunity

<table>
<thead>
<tr>
<th>Project Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem/Opportunity Statement</td>
</tr>
<tr>
<td>SCOPE (DEFINE BOUNDARIES)</td>
</tr>
<tr>
<td>First step in the process:</td>
</tr>
<tr>
<td>Last step in the process:</td>
</tr>
<tr>
<td>Project Goals</td>
</tr>
<tr>
<td>Project Boundaries</td>
</tr>
</tbody>
</table>

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Problem/Opportunity Statement:

*Eliminate data quality errors in the “application review through grant award” timeframe*
Improved Statement:
Processing time for application review through grant award disbursement has increased by 40% within the past 3 grant cycles. 75% of our customers/providers have complained about delays ranging from 18 – 60 days for award disbursement which prevents the department from complying to the current policy which states that disbursements must be provided within 10 business days after award approval.
PROJECT BACKGROUND AND GOAL

Background:
The Women Infants and Children (WIC) Program provides nutrition education, and benefits to eligible Ohio families. Participants shop local retailers or farmers markets for highly nutritious foods on the authorized foods list (AFL) using their prescribed WIC benefits. ODH WIC reviews brand-specific manufacturer requests for product inclusion to the AFL and determines appropriateness of each product. 24% of registered mail submission requests returned as undeliverable in 2017. 64 hours dedicated to correcting addresses and reissuing portal passwords to manufacturers in 2017. Majority of portal submissions required correction. 2 major manufacturers missed 2017 submission deadline because of mailing problems.

Goal:
Simplify the process for adding products to the WIC Authorized Foods List (AFL) to reduce rework and delays, while maintaining program integrity and meeting USDA requirements so that WIC participants have increased access to nutritious foods.
# PROJECT CHARTER  Scope, Goals and Boundaries

<table>
<thead>
<tr>
<th>Project Background</th>
</tr>
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</table>

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<th>Problem/Opportunity Statement</th>
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</table>

<table>
<thead>
<tr>
<th>Project Goals</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Project Constraints</th>
</tr>
</thead>
</table>
## PROJECT CHARTER

Metrics, Benefits, Members, and Sign-Off

<table>
<thead>
<tr>
<th>Performance Metrics: Measures that will tell you if you are successful</th>
<th>Performance Metrics</th>
<th>Current</th>
<th>Goal</th>
<th>Actual</th>
<th>% Change</th>
</tr>
</thead>
</table>

**Projected Benefits**

**Project Team**

- **Team Lead:**
- **Team:**
- **Champion/Sponsor:**
- **Process Owner:**

**Project Champion/Sponsor and Process Owner Sign-Off:** I am committed to supporting this project and implementing the team’s improvements.

- **Sponsor Signature:**
- **Process Owner:**
Problem/Opportunity Statement: Client wait times are too long

Project Goal: Minimize client wait times and reduce unnecessary interruptions of the front desk reception staff

Scope:
First step: Client presents for services and is signed in by front desk staff
Last Step: Client leaves clinic property

Performance metrics:
- Sign-in sheet data
- Client progress notes with service start/end times
- Schedule of appointments for each practitioner
- Number of clients who repeatedly approach window

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Project Charter

Project/Event Title: Application Processing
Project Facilitator: DOP
Agency/Organization: Instructor
Project Champion: 
Charter Last Updated Date: 

Project Background:
Applications are taking too long to process. Customers are complaining because we are delaying their projects getting started. There is an ongoing backlog. We can’t ever get caught up. Staff are stressed out too.

Problem/Opportunity Statement:
Customer requirements for timely response means processing 16 DOP Applications per workday. Currently we are averaging 2.75 days to process 16 applications which means we are falling more behind every day and customers are not happy. We need to improve this process to at least meet customer requirements.

First step in the process:
Application is received in the mail room

Last step in the process:
Customer receives notification of approval or denial of
FINDING PDCA PROJECTS
FINDING PDCA PROJECTS

- Performance or Strategic Plan measures
- Evaluations/audits of programs or administrative systems and functions
- Regular surveys of employees
- Customer service data
- Your customers are complaining
- When something bugs you
- You find yourself saying, there’s got to be a better way!
PROJECT SELECTION PITFALLS

• Morale, communication, etc.
• Preconceived solutions
• Small or trivial – doesn’t matter to anyone
• Other peoples’ problems
• The boss’ policy decisions
• Sacred cows
• You are the primary customer
• Something that is/will be undergoing major change
PROJECT SELECTION

1. Generate a list of ideas of improvement opportunities
2. Clarify those ideas
3. Reduce the list and prioritize
4. Using the Project Selection Criteria, choose the one idea that is most likely to be a successful first process improvement project
5. Pair up with 1-2 others and share ideas. Clarify for each other and make sure the selected projects fit the criteria.

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Criteria for Project Selection

<table>
<thead>
<tr>
<th>Idea 1</th>
<th>Idea 2</th>
<th>Idea 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Technical Issues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it a process?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the scope manageable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can it be reliably measured?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What data are available?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Strategic Issues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it important?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it a “sacred cow”?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does it support the organization’s priorities?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer focus?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High probability of success in 3-6 months?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Empowerment Issues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it within my/our control?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can I/we devote adequate time to it?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do I/we already know the solution?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the organization prepared to implement change?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do we have Leadership Support?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PROJECT SELECTION

Project idea:

*Improve the water heater inspection process* (too much rework and call backs)

Reality Check:

✓ Process
✓ Measurable
✓ Important to customers and staff
✓ We control the process
Step 6. Identify the **major steps** in the process: First step, last step, 3-5 steps in between

Identify the

- Outputs (*Completed Inspection*)
- Customers (*Home Owners*)
- Inputs (*Phone calls, schedules, documents*)
- Suppliers (*Home owners, clerical staff, inspectors*)

This will help you determine who needs to be on your team!

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IF you need a team for this project, Identify needed team members

1. Inspector A
2. Inspector B
3. Supervisor
4. Clerk
5. Customer Service Representative

• Identify data needed to measure improvement
• Develop a project goal statement
• Develop a Team Charter
END OF DAY

• Questions
• What Went Well
• Lessons Learned

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