



# Improvement Project Roadmap

Tailored for service-oriented workplaces, including professional service firms, public-sector agencies, and educational institutions

## 1. PREP

### FOCUS

Determine process to be improved

### CHARTER

Develop thorough prep doc (below)

### DATA

Gather and compile key data

### SCAN

Identify strengths and potential challenges of the workplace culture

### LOGISTICS

Finalize timetable, location, etc.

**What we do:** Guide preparations listed above; serve as point person for developing the project charter.

## Project Charter



### • Overview

Process, goals, reasons for project, intended outcomes

### • Process

Customers, outputs, first and last steps, inputs

### • Data relating to process

### • Key People

Sponsor, team leader, team members, project manager, SMEs

### • Schedule

### • Other

## 2. PROJECT

### Day 1

Getting started • Scope document review • Data • Process walk-around • Learning • Current-state map

### Day 2

Current-state map (continued) • Learning • Waste and inefficiencies • Data • Learning • Idea generation • Idea review and synthesis

### Day 3

Learning • Draft process redesigns • Report, review, and discuss • Future-state process

### Day 4

Future-state process (continued) • Implementation plans • Data analysis and projections • Fine-tuning

### Day 5

Finalize plans, and projections • Team photo • Presentation planning • Team presentation (see below)

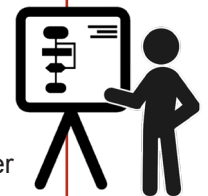
### Post-script

Prep and send cleaned-up versions of future-state map, implementation plans, scorecard, photos, etc. • Submit 1-page summary and article (text and PDF)

**What we do:** Facilitate all team sessions; supply materials and all worksheets; provide just-in-time training during sessions; provide guidance and coaching in-between sessions; within two working days of completion, supply team sponsor, team lead, and project manager with post-event docs; also provide 1-page summary and article with photos.

## Team Presentation

- Why • What • Scope (first step, last step) • Project goals • Key data
- Team's day-to-day work in brief • Current-state process • Major discoveries/opportunities
- Future-state process • Top 3 changes • Projected outcomes • Key measures: before and after
- Implementation plans • Next-week plan
- Experience debrief • Thanks • Q-and-A • Closing comments from leadership • Celebration/mixer



## 3. IMPLEMENTATION

### + 1 Week

Submit postscript materials • Convene key people in one conversation • Review early progress • Review next steps • Answer questions

### +2 Weeks

Touch base with key people • Check progress and possible roadblocks • Discuss, clarify immediate next steps

### +30 Days

### +60 Days

Meet with team • Review progress relative to plan, projections, and any new developments • Refine as needed • Clarify actions for next 30 days

### +90 Days

Conference call with team • Review progress • Discuss emerging factors that can help or hinder implementation • Review and refine action plans covering the next three months

### Ongoing

Be available to key people as needed

**What we do:** Facilitate conversation with sponsor, team lead, and project manager (or PM equivalent) as shown above; meet with team at 30/60 days; conference call at 90 days; provide additional guidance to ensure success.