



Improvement Project Roadmap

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

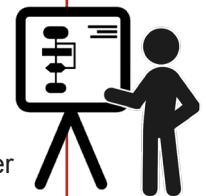
2. PROJECT

| | |
|-------------|---|
| 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.

