



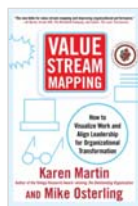
# PROCESS CHANGE

## COMMUNICATION & TRAINING TIPS

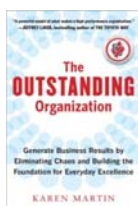
OCTOBER 22, 2015



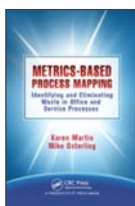
- Consultant – We help clients establish and grow Lean management systems organization-wide.
- Author & Speaker:



Shingo Award



Shingo Award

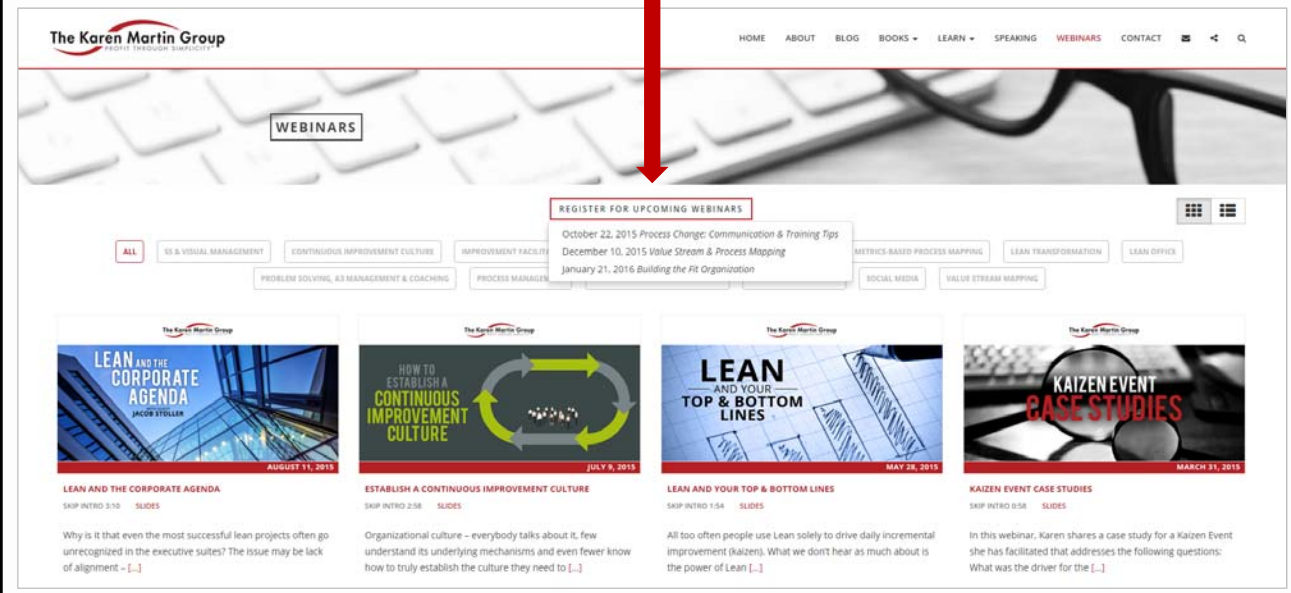


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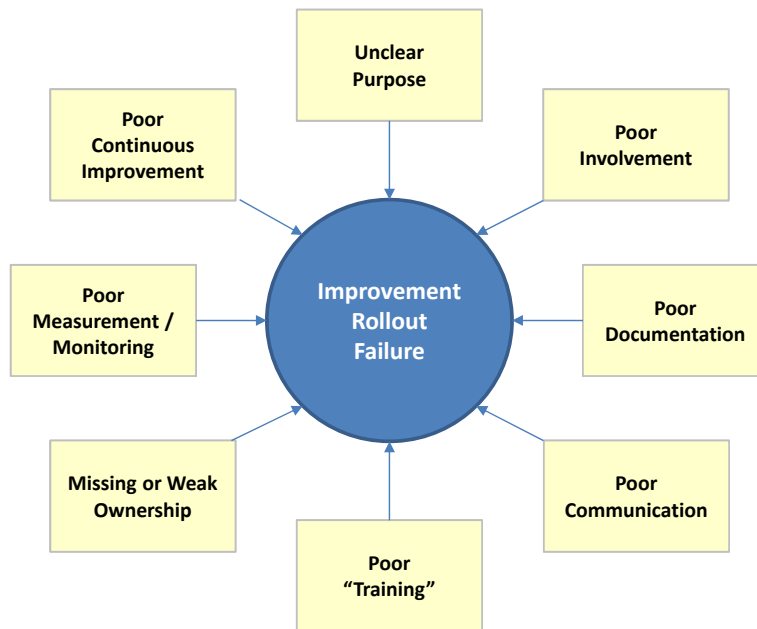
The screenshot shows the 'WEBINARS' page of The Karen Martin Group website. The page features a navigation bar with links: HOME, ABOUT, BLOG, BOOKS, LEARN, SPEAKING, WEBINARS, and CONTACT. Below the navigation bar is a 'WEBINARS' section with a 'REGISTER FOR UPCOMING WEBINARS' button. A list of upcoming webinars is displayed, including 'October 22, 2015 Process Change: Communication & Training Tips', 'December 10, 2015 Value Stream & Process Mapping', and 'January 21, 2016 Building the Fit Organization'. Below this list are four featured webinar cards: 'LEAN AND THE CORPORATE AGENDA' (August 11, 2015), 'HOW TO ESTABLISH A CONTINUOUS IMPROVEMENT CULTURE' (July 9, 2015), 'LEAN AND YOUR TOP & BOTTOM LINES' (May 28, 2015), and 'KAIZEN EVENT CASE STUDIES' (March 31, 2015). Each card includes a title, date, and a brief description. The page number '3' is visible in the bottom right corner.

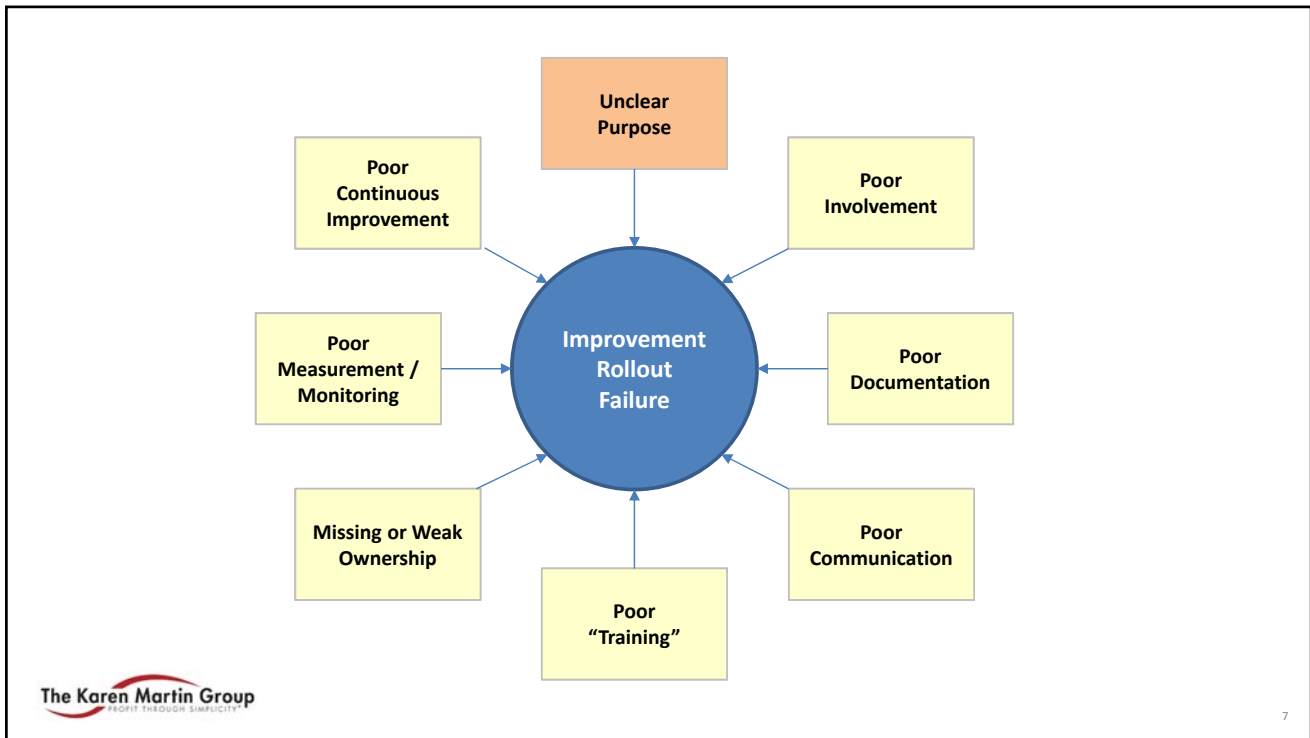


The graphic features a turtle on a skateboard, moving from left to right. The text 'WORK DOESN'T HAVE TO BE AS HARD AS WE MAKE IT' is prominently displayed in a large, bold, sans-serif font. The word 'WORK' is in a dark, bold font, while 'DOESN'T HAVE TO BE AS' and 'AS WE MAKE IT' are in a lighter, bold font. The word 'HARD' is in a very large, bold, dark font. The background is a light, textured surface. The logo for 'The Karen Martin Group' is visible in the bottom left corner.

## You will learn...

- Common points of failure with improvement roll outs.
- How best to communicate change – especially in environments with remote offices.
- “Training” delivery tips for rolling out new processes.
- How to manage processes to assure compliance and timely adjustments.





**WHY  
MATTERS.  
A LOT.**



## Problems:

Gaps between where  
you are and where you  
*need or want to be.*



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## Make a Compelling Case!

“We need to reduce/increase <measurement>  
from **X** to **Y** because...”

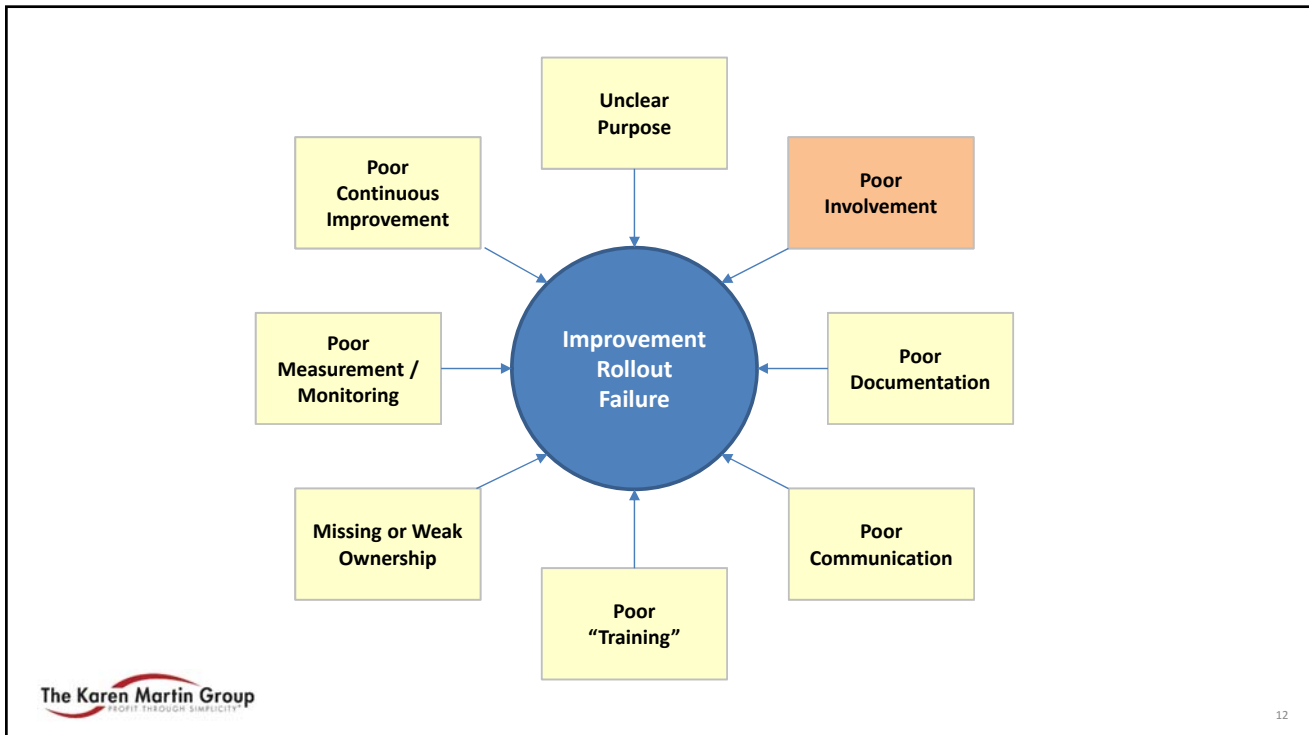


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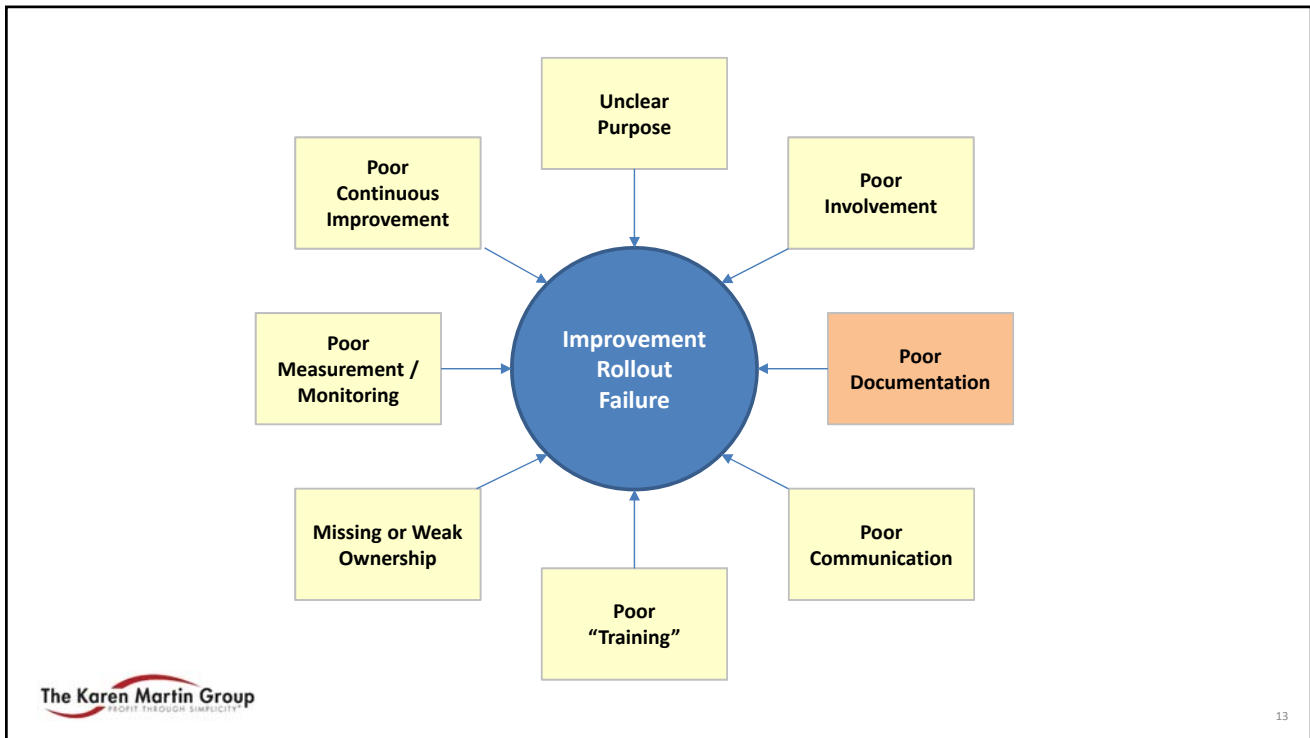
Value Stream Mapping Charter					
Scope		Accountable Parties		Logistics	
Value Stream	Capital equipment	Executive Sponsor	Allen Ward	Event Dates & Times	July 24-26, 2013 8:00 am - 5:00 pm
Specific Conditions	Engineer to order, requires both hardware & software customization	Value Stream Champion	Nancy Little	Base-camp Location	Surfs Up - Room 100
Demand Rate	1000 per week	Facilitator	Dave Parks	Provided	Breakfast & lunch
First Step	Sales reviews the RFQ	Linkages	Linkages	Briefing Dates & Times	July 24, 25, & 26 4:00-5:00 pm
Last Step	Production ships product	Coordination	Coordination		
Boundaries & Limitations	No new tools or equipment changes to existing IT infrastructure; no changes to staff; no budget changes	Briefing Attendees ** required * optional	** Allen W (COO), Joe M (CIO), Sal T (VP Sales) * Bruce R (VP Ops), Carlos P (HR), Su T (CFO), Bill M (VP CS)		
Improvement Time Frame	Future state design is fully realized by December 31, 2013.				
Current State Problems & Business Needs		Mapping Team			
1	Desire to stay ahead of the competition & deepen customer loyalty.	Function / Title	Name	Contact Information	
2	Forecasted growth of 15% for next fiscal year.	1 Sales, Director	Sean Michaels		
3	Unclear & incorrect information flowing through value stream.	2 IT, Director	Diana Marie		
4	RFQ lead time = 2 weeks; PO to software dev lead time = 5 weeks	3 Finance, Controller	Dave Gerald		
5	Competition's RFQ LT is 1 wk; PO to delivery is 4 wks	4 Scrum Master	Ryan Austin		
Goals & Measurable Target Conditions		5 Engineering, Vice President	Nancy Little		
1	Reduce RFQ LT from 2 weeks to 3 days (70% improvement).	6 Manufacturing, Director	Amreen Motiwala		
2	Reduce PO to software dev LT from 5 wks to 3 wks (40% improvement)	7 Customer Service, Manager	Danny Tran		
3	Improve quality of information flowing throughout value stream.	8 Customer (contract manufacturer)	JR Hunt		
4		9			
5		10			
Benefits to Customers & Business		On-Call Support			
1	Faster delivery; less hassle; less cost.	Function	Name	Contact Information	
2	Better working relationships between sales, estimating & engineering.	1 Planning / Purchasing, Planner	Loures Dwyer		
3	Freed capacity to absorb additional business w/o increasing staff.	2 Production Supervisor	Tom St. James		
4		3			
5		4			
Relevant Data		Agreement			
1	Sales effectiveness: RFQ conversion rate.	Executive Sponsor	Value Stream Champion	Facilitator	
2	Financial: Estimate-to-actual cost comparison.	Signature:	Signature:	Signature:	
3	Operational: LT in segments (RFQ to quote; PO to development).	Date:	Date:	Date:	
4					

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Process Change Webinar  
October 22, 2015



Company Logo		STANDARD WORK INSTRUCTIONS	Revision 1 Created: 06.03.15 Revised: 06.06.15
NEW PRODUCT LAUNCH - Post-Beta		Process Owner:	
WHEN - 5 Days before Synthesis Meeting 2			
FUNCTION 1			
1. Step 1 description		Screen Capture of SF fields to be completed	
2. Step 2 description		Image of Checklist Used	
3. Step 3 description			
Confidential - Internal Use Only			

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# Process Change Webinar October 22, 2015

### New Map Creation, Naming, & Page Setup

#### Creating & Naming the File

- Open appropriate template found in Dropbox  
> Documents > iGrafix Templates.

Note: There are 2 templates. One simple, one complex. The simple template is depicted to the right. They are named as:

Template Simple VSM v10  
Template Complex VSM v7

- File > Save As
- Select appropriate folder under "Client" in Dropbox
- File name standard:

Client name or nickname followed by CS VSM or FS VSM followed by v1, v2, v3, etc.

For example: TKMG CS VSM v1

#### Setting Up the Page

Set orientation, scaling, and paper size

- File > Page Setup
- Choose 'Landscape', 'Fit to 1 page wide by 1 page tall', 'legal (14W x 8.5H) if map > 10 blocks

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Page 1 of 2

Assembly Visual Aid

OP#: 2	DESC: Threading Operation	MODEL(S): All model "As	DATE: 03/03/97
CELL: 25	Authorized By: Joe Blow	DOC. NO.: V25-2A	

▲ Inspect work done at previous station    ■ Process steps    ● Self inspection

**Step 1**

1. Take part from cart  
2. Inspect for cracks, burrs and poor plating (see sample boards)

**Step 2**

1. Place body in machine fixture.  
2. Make sure part is seated in fixture as shown in photo

**Step 3**

1. Pull the red button located at the front of the machine

**Step 4**

1. Switch button from "manual" to "automatic"

**Step 5**

1. Once part is threaded, take out of fixture and load next part  
2. Review that part is threaded properly

**Step 6**

1. Place piece on mounting rail for next operation.

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# Process Change Webinar

## October 22, 2015



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Company  
Logo

### New Employee Orientation - Ambassador Checklist

New Employee:

Supervisor:

Ambassador:

Hire Date:


Review Dates:

Background		
Job Description		
Definition of Objectives		
	Yes	No
Have orientation objectives been defined and are they clear?	<input type="checkbox"/>	<input type="checkbox"/>
Outline the objectives to both the new employee and the assigned ambassador.		
Objectives – General		
	Yes	No
Double check workstation, tools, supplies and equipment.	<input type="checkbox"/>	<input type="checkbox"/>
Review desk setup, phone, computer, supplies, tools, safety equipment, etc.		
Meet team members.	<input type="checkbox"/>	<input type="checkbox"/>
Learn the immediate team members and other key individuals in the department.		
Safety briefing.	<input type="checkbox"/>	<input type="checkbox"/>
Review location of safety equipment, evacuation routes, etc. Introduce employee to floor safety wardens.		
Tour work facility.	<input type="checkbox"/>	<input type="checkbox"/>
Learn the location of cafeteria, restrooms, elevators, stairs, etc.		
Introduce department/division employees.	<input type="checkbox"/>	<input type="checkbox"/>
Introduce new employees to others in the department division.		

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# Process Change Webinar October 22, 2015



## Standard Work - Webinars

**Setup**

- Create New Webinar
- Webinar Details
- Registration & Theme
- Registration
- Registration (continued)
- Change Session Settings
- Registration Confirmation & Reminder Emails
- Include Post-Webinar Survey
- Add Registration Link to Website
- Marketing Webinar on Social Media
- Twitter, Share on LinkedIn, Facebook, & Google+

**Registration**

- Select required fields:
  - a. First Name, Last Name, Email Address, State/Province, Country, Industry
- Select new Required fields:
  - a. Organization, Job Title, Questions & Comments
- You will create the following two questions:
  - a. How did you hear about the webinar?
  - b. How did you hear about the webinar?

**Registration (continued)**

- After Registering - select Automatically

### Create New Webinar

- Login to [www.gotwebinar.com](http://www.gotwebinar.com)
- Click on My Webinars (left hand toolbar)
- Click on Schedule Similar Webinar (below Start Date/Time of the most recent webinar)
- This will provide you with the same settings as the last webinar, but you will still need to check all settings to make sure they're correct.

**Webinar Details**

**Title & Description**

- Webinar Name - Enter title provided
- Webinar Description - Enter the description provided

**Date & Time**

- Enter correct date, time, and time zone
- Make sure it does say "Does not recur"

**Schedule a Webinar**

**Title & Description**

**Date & Time**

### Registration

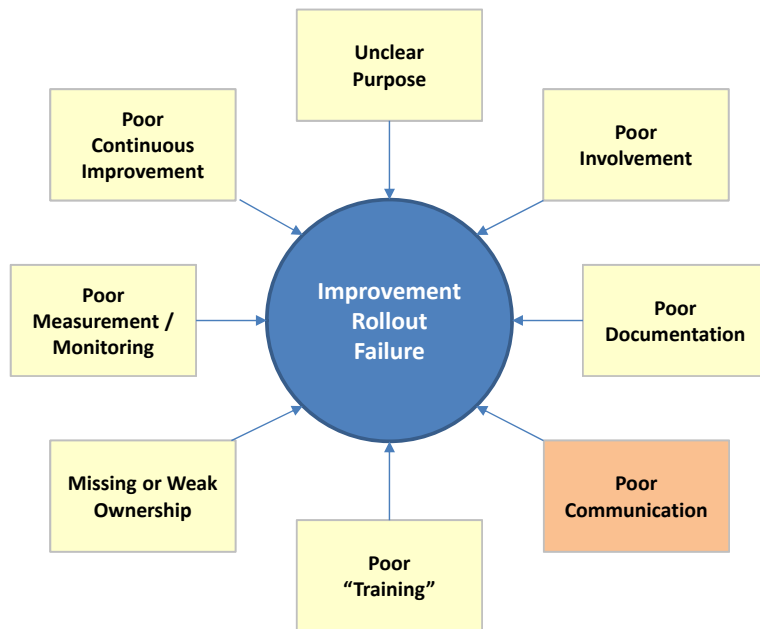
- Select required fields:
  - a. First Name, Last Name, Email Address, State/Province, Country, Industry
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**Registration (continued)**

- After Registering - select Automatically

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**Point of Failure:  
Believing that “telling” = process rollout**



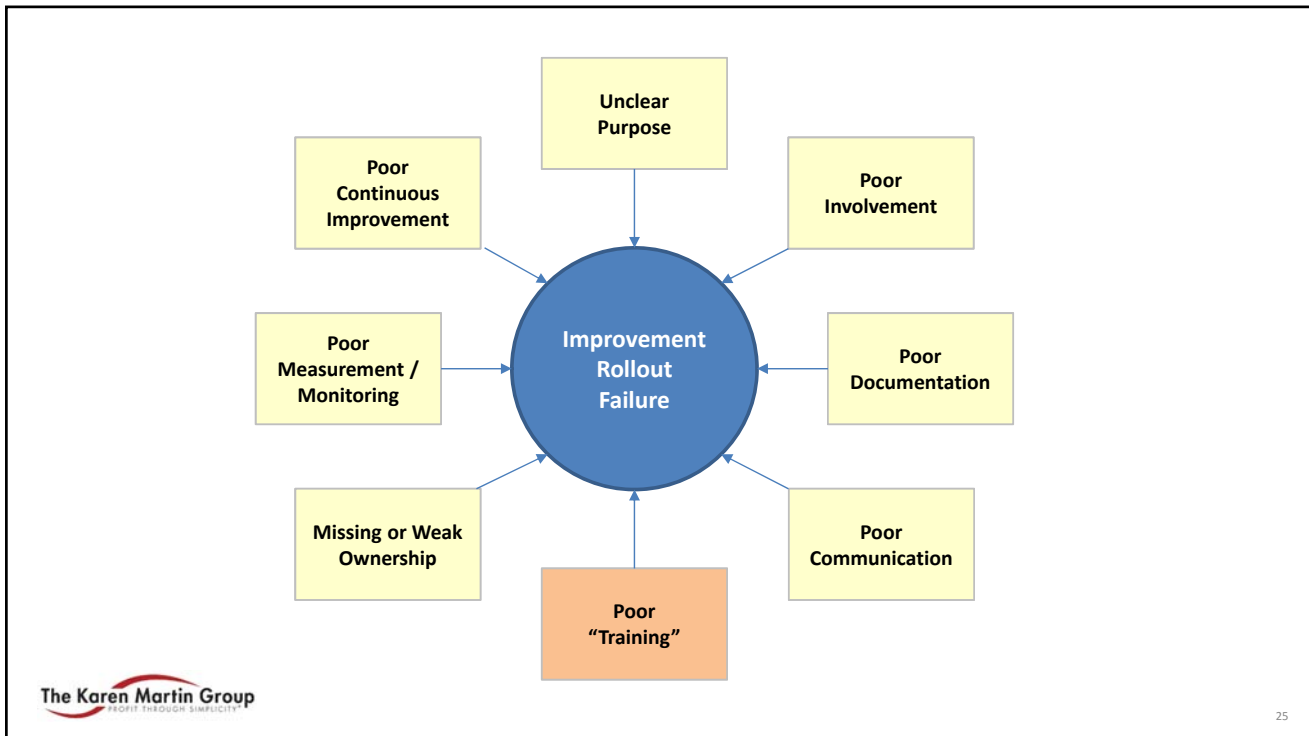
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**Believing that email  
communication =  
process rollout**



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## Questions for Planning Process Rollouts (Communication and Learning Activities)

1. What's the objective? (What do you want people to know or do differently?)
2. Who needs to know? Why?
3. What *specifically* do they need to know?
4. When do they need to know it?
5. What's the best way to deliver the information to assure it meets the objectives of the communication/learning?
6. How will you assess the effectiveness of your communication and learning activities?

## Process Rollout: Learning Requirements

- Documented process
- Conversation, including why, when, how, and Q&A
- Demonstration of new process
- Practice session
- Designated source for questions (Process Owner? Super users?)
  - Ideally onsite close to where the work is done for first few days (or weeks, in some cases)
- Designed source for improvement ideas

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New Process Roll-out - Communication & Learning Work Plan <Process Name>			
Improvements / Process(es)	1	Description	
	2	Description	
	3	Description	
	4		
	5		
Functions / Groups that Need to Attend		Awareness (What & Why)	Details (How)
	1	Sales	X
	2	Engineering	X
	3	Order Management	X X
	4	Account Management	X X
	5	Tech Support	X X
Instructors	1	Amanda Gerber	
	2	Ellen Sampley	
	3	Jeanine Chang	
	4		
Delivery Format(s) Being Used	1	PPT	
	2	Standard work instructions	
	3	Classroom with Webex (recorded)	
	4	Hands on - Participants bring laptops	

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Process Change Webinar  
October 22, 2015

New Process Roll-out - Communication & Learning Work Plan <Process Name>			
When & Where Sessions Will Be Held	Location	Date	Time
1	Conf Room A	8/18/2015	9-11 am PDT
2	Conf Room A	8/19/2015	1-3 pm PDT
3	Conf Room A	8/25/2015	1-3 pm PDT
4	Conf Room A	8/27/2015	9-11 am PDT
5			
6			
7			
8			
Learning Objectives - Awareness Participants	1 Will know...		
	2		
	3		
	4		
	5		
Learning Objectives - Details Participants	1 Will be able to...		
	2		
	3		
	4		
	5		

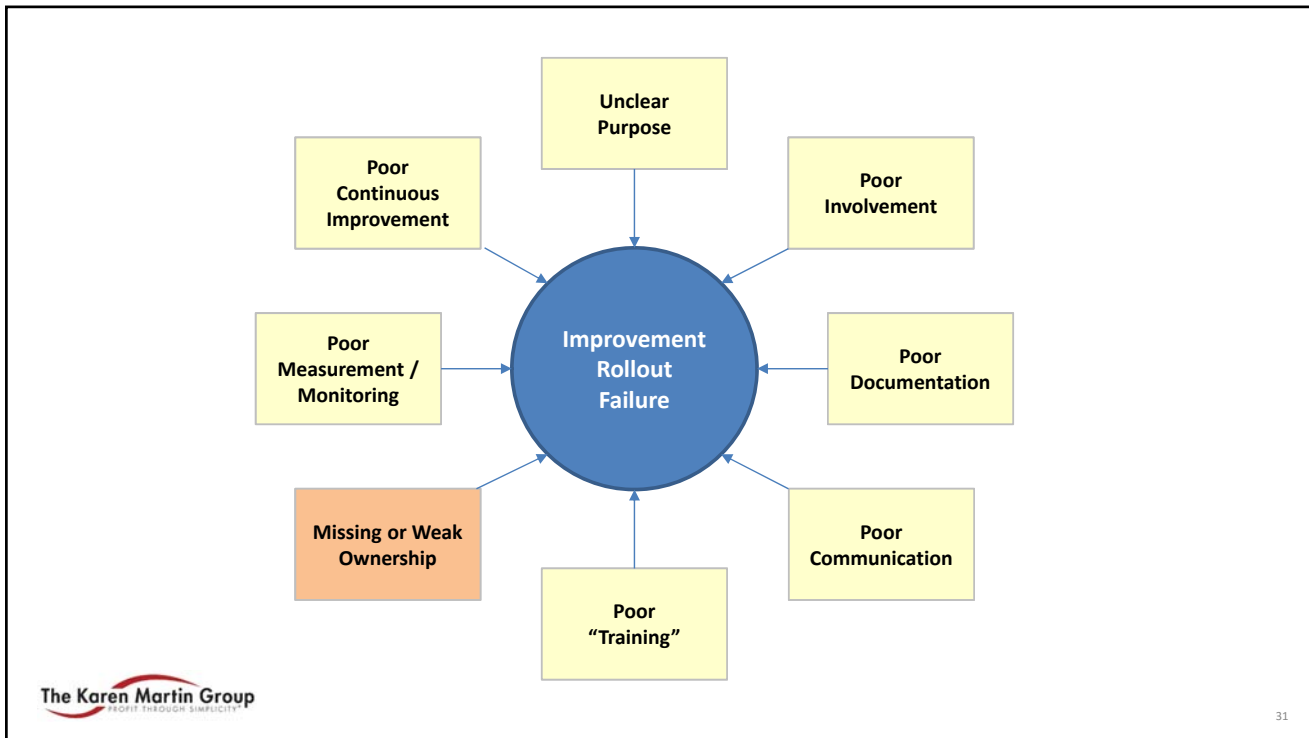
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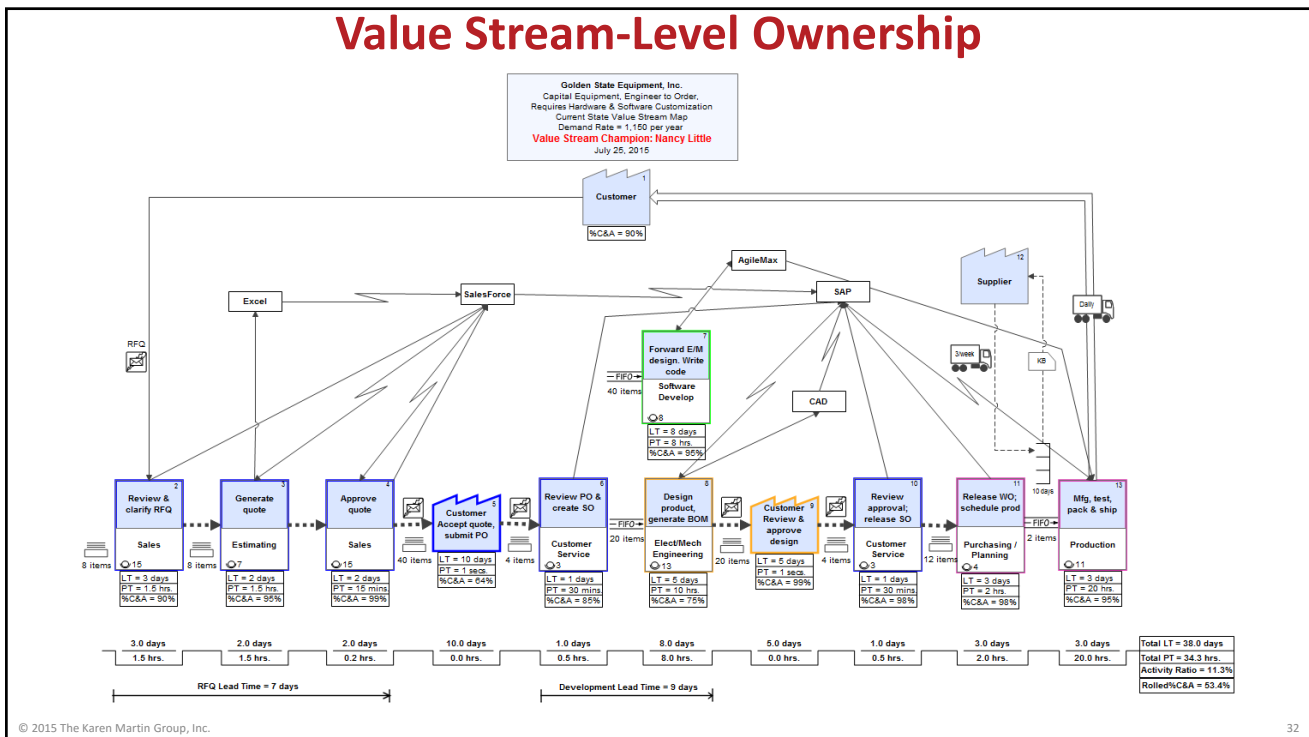
New Process Roll-out - Communication & Learning Work Plan <Process Name>			
Training Materials Needed		Date Due	Owner
1	PPT Overview		
2	Standard work instructions ( How to request billable/non-billable)		
3	Standard work instructions ( How validate & process billable/non-billable)		
4	Standard work instructions ( program setup)		
5	Standard work instructions ( IPM process)		
6	SFG Template		
Action Plan / Preparation	Task	Date Due	Owner
1	Select attendees		
2	Select instructors		
3	Schedule sessions		
4	Send invites		
5	Prepare curriculum & learning materials		
6	Test curriculum & learning materials		
7	Refine curriculum & learning materials		
8	Practice delivering the session		
9	Deliver sessions		
10	Reflect about session; review participant feedback		
11	Revise content as needed		
12	Send follow-up to participants (if needed)		
13	Deliver make-up sessions to those on PTO or at clients		
14	Check with functions to see if process is working well		
15	Design, test, and roll-out adjustments as needed		

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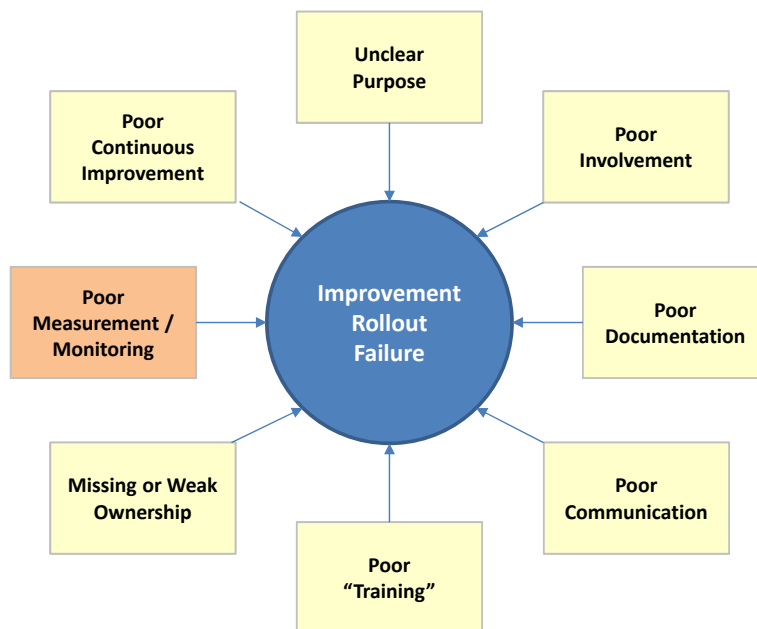
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## Value Stream & Process Oversight

Value Stream & Process Ownership ABC Medical Center			
Value Stream	Value Stream Manager	Process	Process Owner
Outpatient Imaging	Sally V	Scheduling & Registration	Bill G
		Exam & Clinical Reporting	Jose C
		Reports to physician	Maria J
Inpatient surgery	Tonianne S	Admission	Tom M
		Clinical stay	Kathleen T
		Discharge	Mike M
		Billing	Sylvia S
Revenue Cycle Management	Bruce T	N/A	N/A



## 3 Criteria for Proper Process Management

1. Defined and documented processes
2. 2-5 relevant KPIs for each process
  - Visually displayed
  - Consistently measured
  - Consistently improved
3. Sole ownership / oversight

## Guidelines for Establishing KPIs

- 2-5 max
- Measure *performance* (vs. volume - only in certain circumstances)
- Should be heavily operational & customer experience focused
  - But can also include financial & market share measurements
- What problems do you need to shine a light on?
  - Should be dynamic (but don't change them too frequently)

## All value streams & most processes should be monitored via 2-5 KPIs

Defining KPIs									
Process # (on VSM)	Process	Process Owner	Measure of...	KPI	Metric	Data Point Time Period	Single Target	Lower Target (if relevant)	Upper Target (if relevant)
4	Invoicing	Sally Jones	Errors, Customer experience	Credit memos	Raw number	Month			
4	Invoicing	Sally Jones	Errors, Customer experience	Credit memos	% of total \$ due	Month	25%		
4	Invoicing	Sally Jones	Cash flow	Accounts receivables	% of receivables > 60 days	Month	15%		
4	Invoicing	Sally Jones	Customer experience	Accounts receivables	Median TAT (Billing inquiry case open to close)	Month	3.5 business days		
5	Collections	Sally Jones	Cash flow	Accounts receivables	Median invoice age	Month	30 calendar days		

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## Purpose of Visual Management

1. Communicate what needs to be done, when it needs to be done & how to do it
2. Communicate status
3. Show performance
4. Make problems visible

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## How Are We Doing?

Supervisores			
% de Servicio al Cliente	95.3 /100%	100 /100%	100%
Car's Abiertos	0	0	0
Scrap (\$ por Polo Producidos)	10.4 /0.8	0.0 /0.8	1.08
M.E.			
OEE	85%	85%	85%
Mantenimiento Preventivo	55/55	100/50	1
Tarjetas Amarillas Abiertas	2/1	23/1	1
Tarjetas Amarillas Cerradas	10/1	11/1	1
Tarjetas Rojas	2/0	2/0	0
Jefes de Linea			
% SOLD	81%	85%	85%
	84%	85%	85%
	87%	85%	85%
	87%	85%	85%
	90%	85%	85%
	91%	85%	85%
	91%	85%	85%
Hallazgos C, S, & H			
S H A	0/0	0/0	0/0
	0/0	0/0	0/0
	0/0	0/0	0/0
	0/0	0/0	0/0
	0/0	0/0	0/0
	0/0	0/0	0/0
	0/0	0/0	0/0
DPM (Errores de A+B)			
Errores Tipo A + Errores Tipo B X 1,000,000 + Horas Standar	232.2	400	400
	232.2	400	400
	135.2	400	400
	135.2	400	400
	135.2	400	400
	135.2	400	400
	135.2	400	400

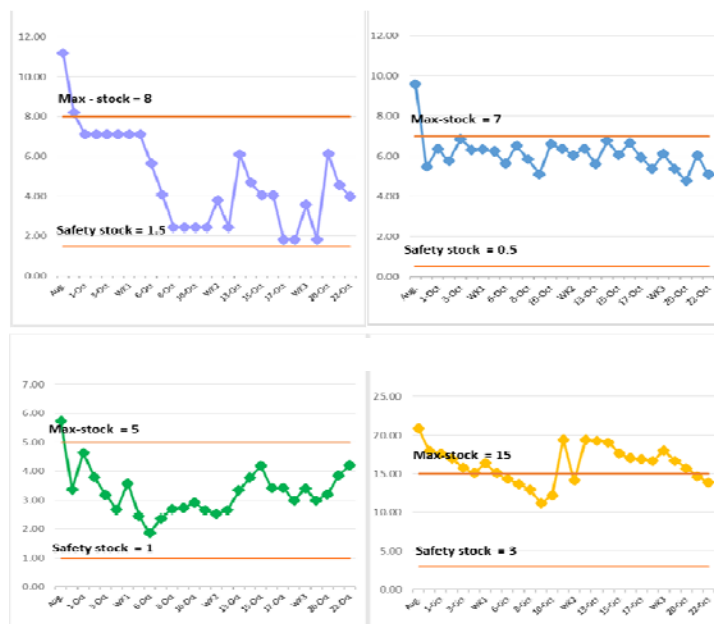
## How Are We Doing?



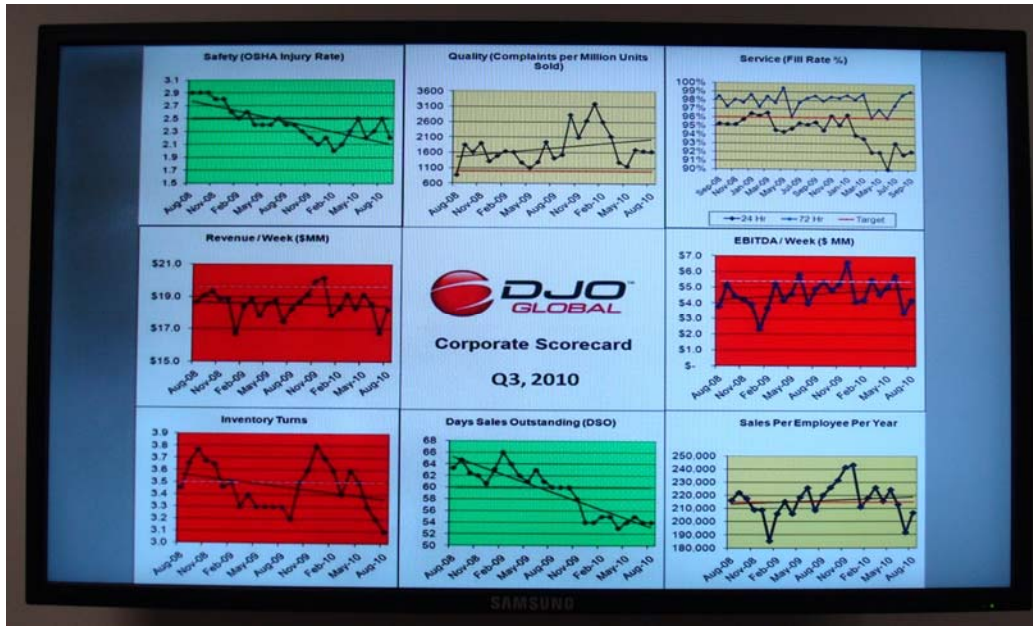
## How Are We Doing?

[illegible]

## How Are We Doing?

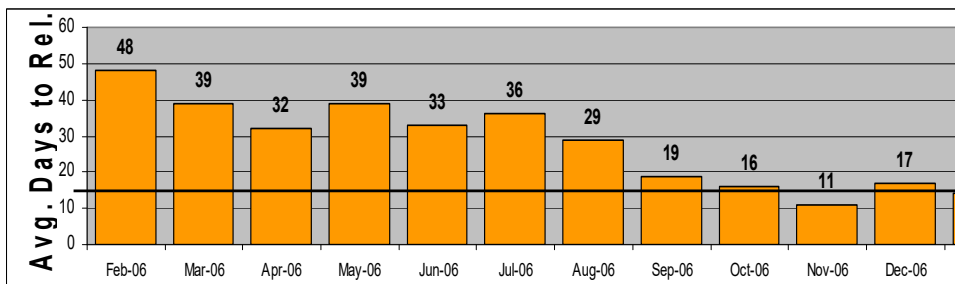
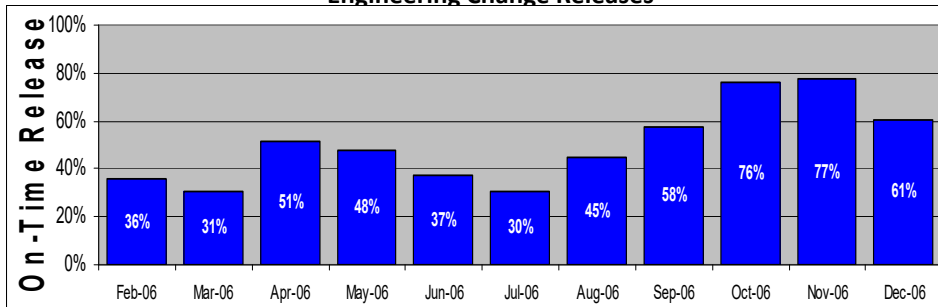


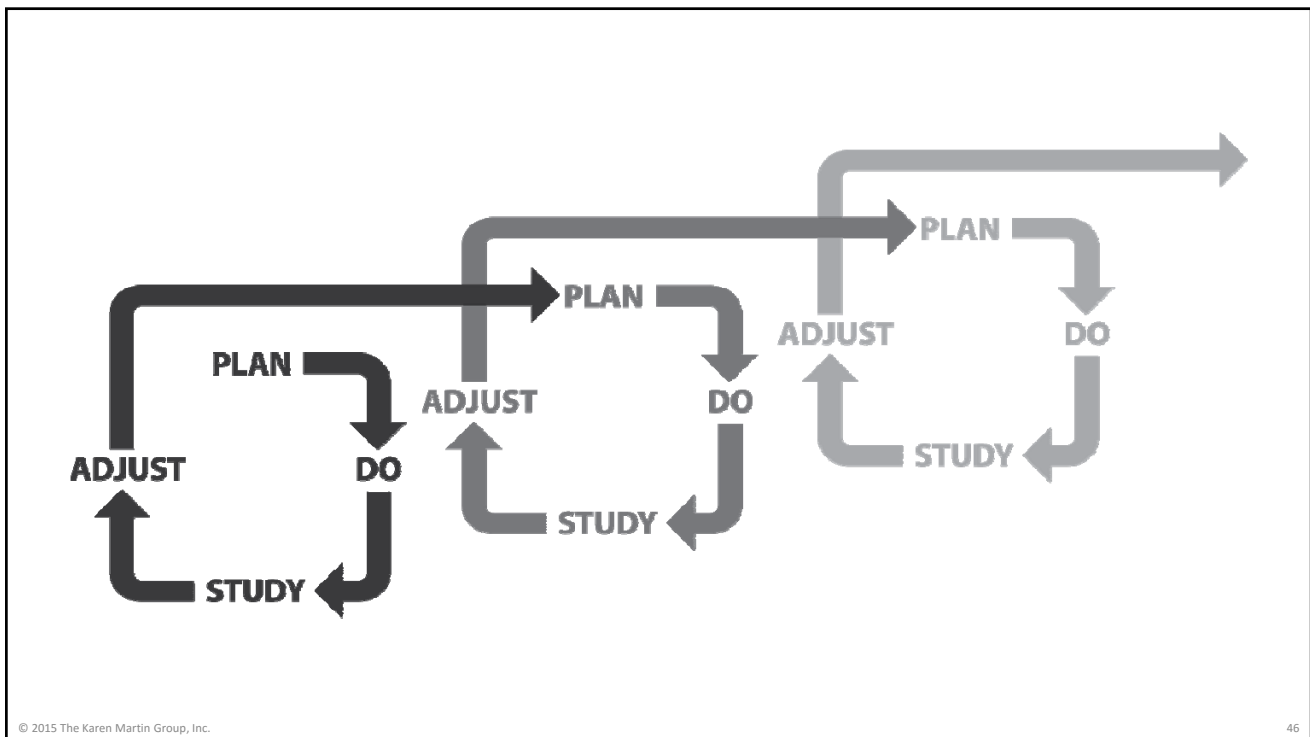
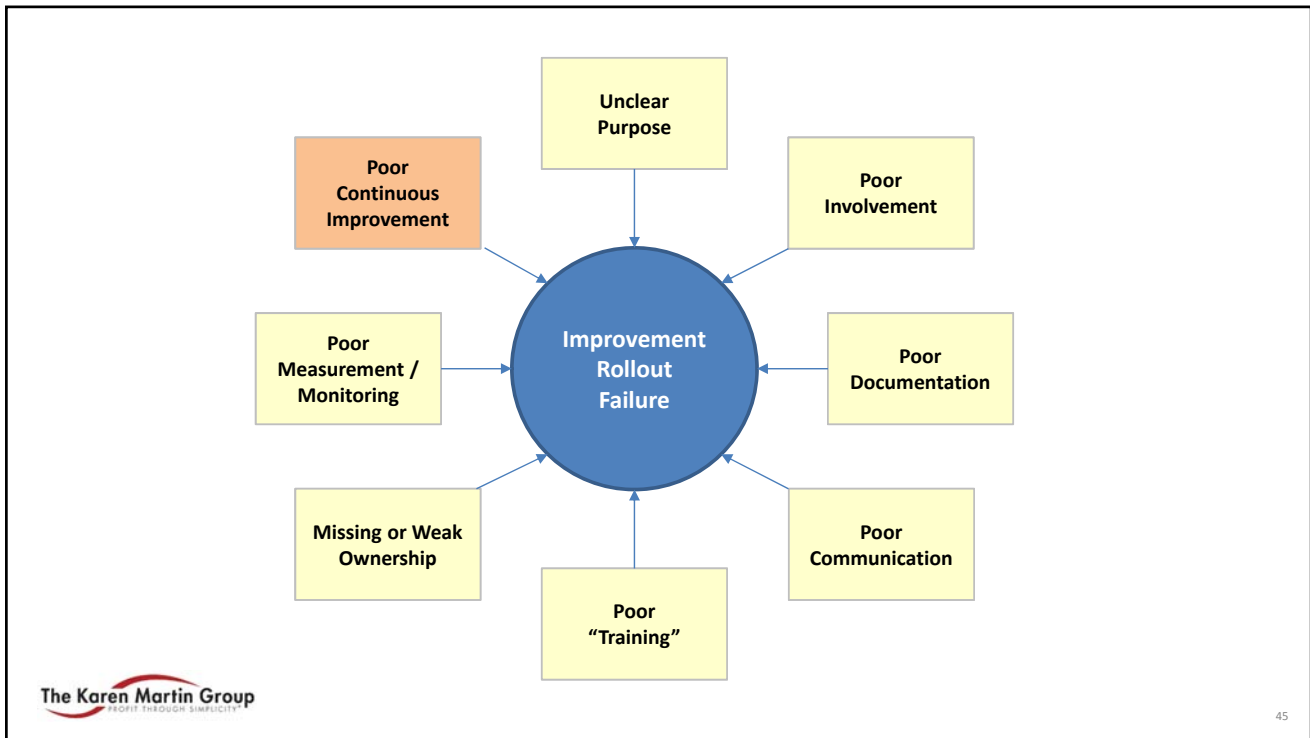
## How Are We Doing?



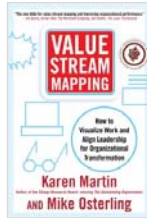
## Administrative Metrics

Engineering Change Releases

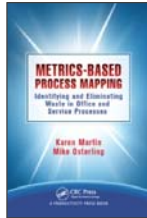




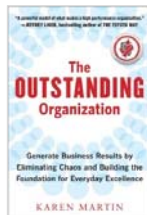
## For Further Learning...



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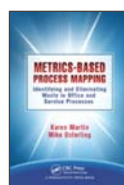
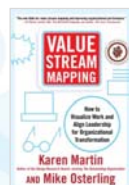
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