Stop the Pain

University of California
Agile Brown Bag Session
May 18, 2015
Shelley Sweet

I4 Process
Agenda

• What is Business Process Improvement?
• Develop a Process Map
• What frustrates you in the workflow?
• Where do you find the pain?
• Create countermeasures for the pain
• Next Steps
Shelley Sweet is President of I4 Process (Ideas, Involvement, Implementation, Impact) in Palo Alto, California. She facilitates process improvement using lean, six sigma, reengineering, and continuous improvement techniques. Her track record includes over 100 complex projects redesigning processes to eliminate wastes, minimize wait and cycle time, and create customer delight. Her unique method “3 Peat” method produces organizational results, builds leaders from the middle out, and imprints process thinking into the organization. She has used this method with over 65 teams at UC Berkeley. She also teaches at executive education programs at BPM Institute. She is the author of The BPI Blueprint: A Step-By-Step Guide to Make Your Business Process Improvement Projects Simple, Structured, and Successful.

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Business Process Management: A management practice that provides for governance of a business's process environment toward the goal of improving agility and operational performance.
BPI and Agile

**Similarities**
- Value Voice of the Customer
- Use data
- Conduct experiments
- Follow a process
- Based on many Lean principles

**Differences**
- Agile often brings customer onto the team; BPI may
- Agile uses time-boxed sprints; BPI has several time boxed projects
- Agile originally for software development; BPI for manufacturing, service and information processes
Making the Process Visual

- Flowchart symbols for process map

A box is an activity

Verb-Noun

A diamond is a review, inspection, or decision point

A connecting arrow shows the direction of the flow, and transport
Your high level map should be 6-12 steps long. If you have more steps than that you are getting too detailed.
Create a High Level Map

After seeing how to do a high level map, create a high level map of 6-10 steps for the process you identified:

1. Start with the first step and last step.
2. Add the steps in between.
3. Add more details if desired; put them as bullets points under a major step.
4. Use 1-2 decision diamonds if you need them.
5. Write the name of the sponsor, and 2 improvement targets your sponsor would want for this process.
Asking About Employee Experience

Employees know the work and can identify many of the problems Pain!!!
8 - Wastes

D - Defects—Errors or mistakes caused by rework, and incorrect information
  e.g. Invoice errors, inaccurate information, services not meeting customer specifications, data entry errors.

O - Overproduction—Producing more, sooner, or faster than needed or before it’s needed
  e.g. Printing paperwork before it is really needed, purchasing items before they are needed, processing paperwork before the next person is ready for it, production that needs storage, posters, stickers or name badges that are left over.

W - Waiting—Time waiting for the next step in a process or customers waiting for service
  e.g. System downtime, approvals and or information from others, documentation reviews by others.

N - Non-Utilized Talents—Underutilizing people’s talents, skills & knowledge.
  e.g. Losing, time, ideas, skills or improvements by not engaging or listening to employees. Limited employee authority and responsibility for basic tasks, command and control management style.

D - Transportation—Unnecessary movements of paperwork, supplies, products or materials. (TR)
  e.g. Movement of materials around campus, moving material in and out of storage, data routed through approval queues in systems.

I - Inventory—Excess supplies, products or materials not being processed or used.
  e.g. Office supplies, informational materials, other materials and supplies.

M - Motion—unnecessary movements by people.
  e.g. Walking to and from copier, central filing, searching for supplies, records or documentation.

E - Extra Processing—Doing more work at a higher quality than required by the customer (EP)
  e.g. Re-entering data, making extra copies, creating unnecessary reports, taking unneeded steps to process information, inefficiencies due to improper use of software.

Source: BPM 101, UCB and Lean Wastes
<table>
<thead>
<tr>
<th>W</th>
<th>Waiting (for information, for approvals, in between steps)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Absent information (missing, skipped, not visible)</td>
</tr>
<tr>
<td>S</td>
<td>Systems (don’t interface, have different definitions, too slow)</td>
</tr>
<tr>
<td>T</td>
<td>Too many cooks (need to consult, many approvers, not clear responsibilities, don’t know who to ask for help)</td>
</tr>
<tr>
<td>E</td>
<td>Excess work, materials, inventory, redoing, approvals, re-entering work</td>
</tr>
<tr>
<td>D</td>
<td>Defects (inaccurate information, change orders, not meeting customer spec.)</td>
</tr>
</tbody>
</table>
Visualize Employee Experience

• Take three green stickies and put an unhappy face on each.
• Write a specific WASTED problem on each sticky. Then write a phrase to explain what that problem is in your process.
• Put the stickies at the steps where you met obstacles or felt frustration – where you were WASTED
• Look at your map. Discuss with a partner what the I-WASTED pain points tell you.
• Later discuss with another employee at work. Have them add new points.
Finding Quick Wins for Early Implementation

<table>
<thead>
<tr>
<th>High Value to the customer</th>
<th>Quick Wins</th>
<th>Longer Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheap and Easy</td>
<td>We’ll see 1</td>
<td>2</td>
</tr>
<tr>
<td>Expensive or Difficult</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
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Next Steps

• Take your process map and pain points back to work
• Review with other employees and sponsor and develop countermeasures to implement

• Later- Take other workshops offered by UCB
Process Analysis

- Costs
- Employee Experience
- Errors
- Standardization
- Waste
- Time
- Roles & Responsibilities
- Risk
- Client Satisfaction
Gather Data and Metrics

- Baseline
- Diagnostic
- Ongoing
Voice of the Customer

Customer Scorecard

To find out
• What do you need, want and require from this process?
Courses at UCB Extension

• BPM A: Process Modeling and Analysis- Fall 2015, Spring 2016


• Courses for your group onsite
Business Process Improvement 101 through UCB Talent and Organizational Performance

May 21, 2015 1-5pm or June 17, 2015 1-5pm

Why take this workshop?
Improvement of processes incorporates all of our Operating Principles and helps us to move, "**Toward a more together, innovative, simplified, accountable and service-oriented workplace.**" Everything that we do involves a process, and to create a culture of continuous improvement, we need to know how to assess and improve our processes.

What will I learn?
Participants will:
· Be equipped to create a detailed process map
· Understand the elements of a process improvement effort
· Use core analysis tools

How to enroll
· Login to the "blu" portal
· Click the UC Learning Center link at the bottom of the “Self Service” section
· Use the “activity search” to search for the event code: BECOBT-BPI101-052115 for May 21 Class or BECOBT-BPI101-061715 for June 17 Class
· Click register
We take the waste out of work.

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