Process Improvement Methods and Tools at Campus Shared Services:

The role of facilitation, metrics and project management.

Presenters
George Noble, Director, Process Transformation and Innovation, CSS
Nick Endsley, Lead Process Transformation Consultant, CSS
Overview

• Process Improvement Methods
  – What is a Lean Six Sigma (LSS) DMAIC approach
  – What is a Lean/Continuous Improvement

• What are the transferable skills from
  – Project Management
  – Facilitation
  – Metrics/Data Analysis
  – Business Process Improvement

• Examples of how they are being used in CSS today

• Q&A
What is LSS DMAIC & Lean/Continuous Improvement

LSS DMAIC

• Combination of 2 Business Process Improvement methodologies, Lean (TPS) & Six Sigma
• Focused on removing wastes, simplifying process, narrowing variance, reducing cycle times and reducing defects
• Rigorous phased methodology
  – Define
  – Measure
  – Analyze
  – Improve
  – Control
• Project Start/End

Lean/Continuous Improvement

• Focused on removing wastes
  – Pain Points, Reduce Cycle Times
• Empowers the staff doing the work to make changes
• Small incremental
• Test, check, adapt
• Ongoing continuous, iterative
Which is the right tool for the right job?

LSS DMAIC

- Process may need significant change/redesign
- Cause for problems are unclear
- Solution is not known

Lean/Continuous Improvement

- Need to make small tweak to an existing process
- Likely Solution is known
- Test in small scale before implementation
- Used to maintain/improve the efficiency of a process
LSS DMAIC - Define

- Set the foundation scope for the project
  - Charter

- High level process map

- Voice of the customer (VOC)

- Stakeholder analysis*

- Estimate cost benefits*

- Risk Analysis*

*These are updated throughout all phases of DMAIC
LSS DMAIC - Measure

- Data centered - Statistical
  - Output measurements
  - Defects defined
  - Process capability
  - Voice of the process
LSS DMAIC - Analyze

• Detailed Process Maps/Pain Points

• Root Cause Analysis
  – Project Team Brain Storming

• Prioritize Causes

• Review Performance Gap between process and Customer Requirements
LSS DMAIC - Improve

- Solution Generation
- Select Solutions
- Pilot Test
- Implementation Plan (WBS)
LSS DMAIC - Improve

- Process Documentation
- Controls in place
- Measure performance
- Transfer Ownership
- Identify Other Improvement Opportunities
Close of a process improvement project will transition to continuous improvement
Which is the right tool for the right job?

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Lean/Continuous Improvement

- Need to make small tweak to an existing process
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Lean/Continuous Improvement

• Staff are taught to be aware of how they do the work and to look for improvement opportunities

• Empowers the staff doing the work to suggest changes in areas of their control

• Staff meet regularly to discuss ideas and use visual management tools
Lean/Continuous Improvement

- 3 Phases used in our approach to Lean/Continuous Improvement
  - Idea Generation
  - Develop Solutions & Test
  - Results/Act
  - Plan
  - Do & Check
  - Act

- Did our change work, did we get the results we expected
- Do we need further changes or roll back to prior state
Lean/Continuous Improvement

Idea Generation

- Staff submit ideas any time or bring up at regular CI discussions
- Supervisor/Team Lead facilitates regular meetings
- Team reviews which solutions to work on and assigns owner
- Ideas that are larger in scope get submitted to CSS Senior Leadership Team
Lean/Continuous Improvement
Develop Solution & Test

- Staff further develop the original solution idea and make plan to test
- Gather data about current state and plan how to track impact of change
Lean/Continuous Improvement
Results/Act

• Discuss results and decide to
  – Implement new standards
  – Revise and retest
  – Roll Back

• Monitor improved process

• Review additional improvement ideas…
  Begin again
Lean/Continuous Improvement
Visual Management
Lean Continuous Improvement

Idea Generation > Develop Solutions & Test > Results/Act

Larger Ideas submitted to SLT

SLT reviews potential projects and defines

SLT initiates additional project to meet business needs

Prioritize Projects

Active LSS DMAIC Projects

LSS DMAIC & Lean/Continuous Improvement @ CSS
Examples of past and current projects/efforts

LSS DMAIC

- Summer Salary
- T&E
- GSR/ASE Hiring

Lean/Continuous Improvement

- Summer Salary
- Vacation Final Payout
- Vacation Reconciliation
- Seniority Calculation
- Paperless Onboarding
Future steps for trainings

- **Yellow Belt**
  - Lean/CI Focused
  - @CSS all staff will receive this training

- **Green Belt**
  - Learn the LSS DMAIC process
  - 5 half day sessions
  - Active learning, students will come into training with a project signed off on by sponsor and lead that project throughout the sessions
  - Green belt learners will be coached in between sessions by Black Belts
  - Smaller class sizes, will require application process
  - @CSS only staff that have been identified as needing to lead BPI projects will go through the series of classes

- **Certification program**
  - Working to develop a LSS Green Belt certification program
  - Requires learner to complete project and give presentation to sponsors and review board (Master Black Belt & Black Belts)
  - Working to align certification and LSS Programs with all three tiers of California’s higher education institutions
    - UCs
    - CSUs
    - Community Colleges