External Training Purchases L6S Kaizen Event Outbrief

**The External Training Purchases
Process Improvement Team**

Agenda

- Introductions
- Charter
- Schedule
- Event Activities
- Current State & Analysis
- Ideal State
- Brainstorming
- What Changed
- Future State
- Get-To-Excellence (GTE) Plan
- Future Considerations

Introductions

NSSC External Training Purchases L6S Kaizen Event Charter

Problem Statement: Unclear roles and responsibilities, excessive handoffs, and a single metric that covers all submissions regardless of relevance or applicability are impacting the effectiveness of the Training Purchases staff. The metric for this activity requires procurement, registration, and notification to the student within 5 business days of receipt at the NSSC.

Goal Statements:
- Clarify roles & responsibilities, reduce handoffs to the maximum extent possible, reduce end-to-end transaction time by 50%, and level the workload across all 5 days of the SLI (Goal: 1 month).
- Reduce the number of requests processed on or after the last day by 50%; redefine expectations for success (revise SLI) (Goal: 3 months).
- Convert training purchases process to paperless (Goal: 6 months).

Process Boundaries:
- Process begins with receipt of a training request (SF-182)
- Process ends with delivery of records to the records storage facility (SLI ends when student is notified of registration)

Commandment and Monuments:
- Commandments: Must follow applicable Agency policies & directives.
- Monuments: Remedy, SATERN, SAP, P-Card system to be retained.

Event Dates: Nov 29 – Dec 1
Location: Conference Center 107

Co-Champions: Ken Newton, Ginger Smith

Co-Sponsors: Anita Harrell, Scott Taylor

Team Co-Leads: Mike McCann, Vessie Means

Team Members:
Darryl Rouse
Janelle Pearson
Lisa Rhudy
Elaine Couchman
Mabel Delgado
Alicia Ransom (observer)

Facilitators: Paul Rydeen, Donald St. Germain

NSSC External Training Purchases L6S Kaizen Event Charter

Project Mission:
Examine all aspects of the current External Training Purchases process flow (within event scope) and restructure it to make a more efficient, streamlined process that minimizes handoffs and meets or exceeds the SLI

Constraints:
Team members will be expected to devote 100% of their time to the 3-day event, and attend Out-Brief

Assumptions:
The focus of the team will be on improving the timeliness, efficiency, and quality of the existing process, not designing a new process

Reporting:
Status of implementation progress will be presented weekly at scheduled meetings with the Champions and Sponsors

Team Guidelines:
- The team will meet 11/29/10 – 12/1/10 from 8:00 am to 4:00 pm, and 12/2/10 from 9:00 am to 10:00 am
- All decisions will be made by consensus

Preliminary Project Plan:
Project Definition: Oct 29 – Nov 19
-Define scope & goals
-Secure team members
-Gather data

Kickoff: Nov 29 (8:00 – 8:30)
Current State: Nov 29 (8:30 – 4:00)
-Charter review
-Map current state
-Analyze current state

Current State: Nov 30 (8:00 to 10:00)
-Identify waste / optimize flow
Ideal State: Nov 30 (10:00 – 2:00)
-Map ideal state
Future State: Nov 30 (2:00 – 4:00)
-Map future state

Future State: Dec 1 (8:00 – 3:00)
-Develop Implementation Plan
-Prepare for Out-Brief

Out-Brief: Dec 2 (9:00 – 10:00)
-Obtain management commitment to follow through on Implementation Plan

Event Activities Completed

- Constructed Current State

- Current State Analysis

  – Trigger Sheets

  – Value?

- Constructed Ideal State

- Brainstormed Ideal State vs. Future – What prevents us from implementing the ideal state?

- Future State

- Identified Actions

- Get-To-Excellence (GTE) Plan

Tools: Flow Charting, Brainstorming, Trigger Sheets, Value Analysis

Current State

Current State Analysis

Trigger Sheets

| Task:	
Trigger:	
Done:	
Cycle Time:	
Touch Time:	
Takt Time:	
No. of People:	
Items in In-Box:	
No. of Approvals:	
Distance Item Travels:	
ESH Issue:	
% Rework:	
Top 3 Rework Issues:	
1.	
2.	
3.	

Current State Analysis (cont.)

Value-Added Activities

- Activities which change the form, fit or function of the product/service <u>AND</u>
- Activities which, when asked, the customer is willing to pay more if we did more of it <u>AND</u>
- Activities done right the first time

Non Value-Added Required - Needed Activities
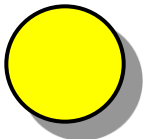
- Activities which may be necessary but the customer will not pay you to do
- Cannot be eliminated (due to non-robustness of process) based on current state of technology
- Required (regulatory, customer mandate, legal)

Non Value – Added Activities

- Activities that consume resources but create no value in the eyes of the customer
- The customer is not willing to pay
- Pure waste (8 forms)

Ideal State

What Changed?

- Instituted paperless process
  - Eliminated activity log checklist (the process has become the checklist)
  - Increased utilization of Remedy
  - Eliminated printing and manual transportation of folders
- Reduced rework
- Reduced handoffs
- Reduced search and queue time
- Reduced multiple storage procedures
- Eliminated duplication of work by eliminating process steps
- Identified process for denying incomplete packages submitted by Centers

Future State

What Changed?

	Current	Future	Improvement
Steps	26	**21**	19%
Cycle Time (minutes)	8767	**2053**	76%
Touch Time (minutes)	225	**140**	38%
First-Pass Yield (FPY)	31%	**92%**	298%

Get-To-Excellence Plan and Follow-up

#	Type	Event Description	Target Date	% Comp	Owner
1	JDI	Purchase Adobe Pro (13 copies)	12/31/2010	0%	Vessie Means
2	JDI	Update metrics data & calcs in NBID (Task 4)	12/31/2010	25%	Vessie Means
3	JDI	Create NSR to correct "no match" for 182s that do not create NSR	12/3/2010	0%	Vessie Means
4	JDI	Create NSR to create NBID report for reconcilation support	12/3/2010	0%	Elaine Couchman
5	JDI	Stop creating paper folders	1/31/2011	0%	Mike McCann
6	JDI	Relate all child NSRs to parent NSRs vs SATERN ID	12/10/2010	0%	Vessie Means
7	JDI	Revise procurement policy for procurement documents (wet sig. vs. electronic)	12/15/2010	0%	Mike McCann
8	JDI	Create NSR to adding fields in Remedy	12/15/2010	0%	Mike McCann
9	JDI	Develop training plan for NSSC employees	12/31/2010	0%	Alicia Ransom
10	JDI	Change Mgmt plan	12/15/2010	0%	Mike McCann
11	JDI	Desk Guide update	12/31/2010	0%	Pearson / Ransom

JDI ☑
Kaizen ☐
Project ☐
VSM ☐

High
Benefit
Low

X I	C
P	K

Easy   Hard
Difficulty

Estimated Task Dates: 12/1/10 to 12/31/10

Owner: Vessie Means

Potential Team Lead and Members:

Lead – Vessie Means
Members – IT Dept

Description/Problem Statement:

Purchase Adobe Pro (13 copies). Needed to move to paperless environment.

Objectives/Deliverables:

Get new software loaded on desktops to allow electronic document management.

Level of Effort: minimal

Benefits:

Essential to paperless environment.

JDI ■
Kaizen ☐
Project ☐
VSM ☐

Benefit High / Low
Difficulty Easy / Hard

	Easy	Hard
High	**X** I	C
Low	P	K

Estimated Task Dates: 12/01/10-12/31/10

Owner: Vessie Means

Potential Team Lead and Members:

Lead: Vessie Means
Members: PMO

Description/Problem Statement:

Update metrics data and calculations in NBID (Task 4).

Eliminated Task 4; concerned that data collection is
   dependent on Task 4 activity.

Objectives/Deliverables:

Accurate data collection.

Level of Effort: Minimal

Benefits:

To ensure utilization and SLA data are collected
correctly.

■ JDI
☐ Kaizen
☐ Project
☐ VSM

Benefit High / Low

X	I	C
	P	K

Easy   Hard
Difficulty

Estimated Task Dates: 12/01/10-12/03/10

Owner: Vessie Means

Description/Problem Statement:

Create NSR to correct "no match" for 182's that do not create NSR.

When employee name cannot be matched no NSR is created.

Potential Team Lead and Members:

Lead: Vessie Means
Members: IT

Objectives/Deliverables:

Accurate creation of all 182's.

Level of Effort: Minimal

Benefits:

Accurate creation of all 182's.

☑ JDI
☐ Kaizen
☐ Project
☐ VSM

Benefit: High / Low
Difficulty: Easy / Hard

X I	C
P	K

Estimated Task Dates: 12/01/10-12/03/10

Owner: Elaine Couchman

Potential Team Lead and Members:

Lead: Elaine Couchman
Members: PMO and IT

Description/Problem Statement:

Create NSR to create NBID Report to support PCard Solutions reconciliation.

Difficulty in matching credit card statements to PCard Solutions entries.

Level of Effort: Minimal

Objectives/Deliverables:

Complete a report that provides all Remedy entries required to match credit card statement to PCard Solution entries.

Benefits:

To reduce reconciliation time.

JDI

- ■ JDI
- ☐ Kaizen
- ☐ Project
- ☐ VSM

Estimated Task Dates: 12/01/10-01/31/11

Owner: Mike McCann

Potential Team Lead and Members:

Lead: Mike McCann
Members: External Training Team

Description/Problem Statement:

Stop creating paper folders.

Manual distribution and handling of training documentation and missing folders.

Objectives/Deliverables:

A paperless external training process.

Level of Effort: Medium

Benefits:

Eliminating handling of paper based products, save money, and GO GREEN!

JDI
☐ Kaizen
☐ Project
☐ VSM

	Easy	Hard
High	**X**	I	C
Low		P	K

Benefit (vertical axis), Difficulty (horizontal axis)

Estimated Task Dates: 12/01/10-12/10/10

Owner: Vessie Means

Potential Team Lead and Members:

Lead: Vessie Means
Members: External Training Team

Description/Problem Statement:

Relate all "child" NSR to "parent" NSR .

Multiple systems of record currently in use to include paper based folders.

Level of Effort: Minimal

Objectives/Deliverables:

Consistent approach to relating all associated NSR's.

Benefits:

Ability to locate all documentation associated with a single External Training event.

JDI ☑
Kaizen ☐
Project ☐
VSM ☐

Benefit: High / Low
Difficulty: Easy — Hard

	I	C
X	P	K

Estimated Task Dates: 12/01/10-12/15/10

Owner: Mike McCann

Potential Team Lead and Members:

Lead: Mike McCann
Members: Mike Sweigart

Description/Problem Statement:

Investigate policy requirement for procurement documents and wet signature approvals.

Objectives/Deliverables:

Eliminate paper by eliminating wet signatures.

Level of Effort: Minimal

Benefits:

GO-GREEN!

JDI ☑
Kaizen ☐
Project ☐
VSM ☐

Benefit: High / Low
Difficulty: Easy / Hard

	X	
	I	C
	P	K

Estimated Task Dates: 12/01/10-12/15/10

Owner: Mike McCann

Potential Team Lead and Members:

Lead: Mike McCann
Members: Vessie Means, Janelle Pearson, Mabel Delgado, IT and PMO

Description/Problem Statement:
Create NSR to add additional fields in Remedy.

Date of Receipt
Bill To
Academic Payment Date
Preparer
Credit Amount
DUNS #

Objectives/Deliverables:

Key elements to facilitate reports and reconciliation.

Level of Effort: Medium

Benefits: Accurate reporting and improved efficiency of reconciliation.

JDI ■
Kaizen ☐
Project ☐
VSM ☐

Benefit — High / Low
Difficulty — Easy / Hard

I	C
P	K

X

Estimated Task Dates: 12/01/10-12/31/10

Owner: Alicia Ransom

Potential Team Lead and Members:

Lead: Alicia Ransom
Members: Lisa Rhudy

Description/Problem Statement:

Develop training plan for NSSC External Training Team.

Process changes and to correct processing inconsistencies.

Objectives/Deliverables:

Outline of training requirements to cover entire External Training process.

Level of Effort: Minimal

Benefits:

Consistent streamline process.

JDI
☑ JDI
☐ Kaizen
☐ Project
☐ VSM

Benefit
High / Low

	I	C **X**
	P	K

Easy — Hard
Difficulty

Estimated Task Dates: 12/01/10-12/15/10

Owner: Mike McCann

Potential Team Lead and Members:

Lead: Mike McCann
Members: Vessie Means

Description/Problem Statement:

Change management plan.

Ensure all parties are aware of process changes and
requirements/expectations.

Level of Effort: Minimal

Objectives/Deliverables:

Successful implementation.

Benefits:

Positive understanding of process changes and
improvements.

JDI
☐ Kaizen
☐ Project
☐ VSM

Benefit: High / Low
Difficulty: Easy / Hard

	Easy	Hard
High	**X** I	C
Low	P	K

Estimated Task Dates: 12/01/10-12/31/10

Owner: Janelle Pearson/Alicia Ransom

Potential Team Lead and Members:

Lead: Janelle Pearson and Alicia Ransom
Members: Vessie Means and Elaine Couchman

Description/Problem Statement:

Current process documentation is out of date (Desk Guides).

Objectives/Deliverables:

Detailed step-by-step guide to External Training process.

Level of Effort: Medium to Significant

Benefits:

Consistent process.

- Desktop faxing capability.

- Modify Certification Exception Report.

- How to do SAP/Invoice for foreign vendor.

- Document invoice approval process for cardholder.

- Bulk purchases.

- Reimbursements.

- Records Retention.

- Venue/Date Change.

- Handling of expedites.

- Substitutions.

- Policy for rejections of 182's.

- Desegregation of work assignments.

- Cancellations with credit.

- Service Delivery Guide update.

Backup Slides

RELEASED - Printed documents may be obsolete; validate prior to use.

28

P.I.C.K. Chart

Parking Lot