# 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.

How a Lean practitioner can help:
Guide above prep; serve as point person for developing 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**

### 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**

## 2. PROJECT

<table>
<thead>
<tr>
<th>Day</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 1</td>
<td>Getting started • Scope document review • Data • Process walk-around • Learning • Current-state map</td>
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<tr>
<td>Day 2</td>
<td>Current-state map (continued) • Learning • Waste and inefficiencies • Data • Learning • Idea generation • Idea review and synthesis</td>
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<tr>
<td>Day 3</td>
<td>Learning • Draft process redesigns • Report, review, and discuss • Future-state process</td>
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<td>Day 4</td>
<td>Future-state process (continued) • Implementation plans • Data analysis and projections • Fine-tuning</td>
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<td>Day 5</td>
<td>Finalize plans, and projections • Team photo • Presentation planning • Team presentation (see below)</td>
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**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)

How a Lean practitioner can help:
Facilitate team sessions; 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; provide 1-page summary and article with photos.

## 3. IMPLEMENTATION

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ 1 Week</td>
<td>Submit postscript materials • Convene key people in one conversation • Review early progress • Review next steps • Answer questions</td>
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<tr>
<td>+2 Weeks</td>
<td>Touch base with key people • Check progress and possible roadblocks • Discuss, clarify immediate next steps</td>
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<tr>
<td>+30 Days</td>
<td>Meet with team • Review progress relative to plan, projections, and any new developments • Refine as needed • Clarify actions for next 30 days</td>
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<tr>
<td>+60 Days</td>
<td>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</td>
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<tr>
<td>+90 Days</td>
<td>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</td>
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<tr>
<td>Ongoing</td>
<td>Be available to key people as needed</td>
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How a Lean practitioner can help:
Facilitate conversations with sponsor, team lead, and project manager as shown above; meet with team at 30/60 days; conference call at 90 days; provide additional guidance to ensure success.