



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

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**

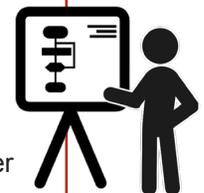
2. PROJECT

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

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



3. IMPLEMENTATION

+ 1 Week	Submit postscript materials • Convene key people in one conversation • Review early progress • Review next steps • Answer questions
+2 Weeks	Touch base with key people • Check progress and possible roadblocks • Discuss, clarify immediate next steps
+30 Days +60 Days	Meet with team • Review progress relative to plan, projections, and any new developments • Refine as needed • Clarify actions for next 30 days
+90 Days	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
Ongoing	Be available to key people as needed

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.