# Forming Project Plan – Preparing the Organization and Initial Design Template

| **Project Step** | **Responsibility** | **Date Planned** | **Date Complete** |
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| 1. Designate project sponsors and team leaders taking into consideration processes improvement and ongoing current operations
	1. Outline leadership responsibilities and expectations
	2. Conduct adaptive leadership training as appropriate to prepare leaders to lead
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| 1. Define the Value Proposition in terms of internal and / or external customers and stakeholders. Develop the Project Charter Document
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| 1. Develop the project staffing plan staffing both Team “P” (present ongoing operations) and Team “F” (future process improvements)
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| 1. Develop strategic and tactical communications plans:
	1. Communicate organization mission and vision
	2. Compelling reason for change
	3. Expected outcomes
	4. Realistic costs and benefits of project
	5. Organizational impact including how it will affect roles, responsibilities, and staffing
	6. Assess feedback and address concerns
	7. Establish schedules for regular ongoing communications
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| 1. Conduct orientation sessions
	1. Orientation for all organizational members
	2. Orientation for project members
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| 1. Review Project Charter with Teams
	1. Modify as appropriate to promote involvement and commitment amongst teams
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| 1. Conduct team and process improvement skills training for project team members
	1. DISC Temperament
	2. Effective meeting skills
	3. Process improvement technical skills
	4. Group decision making and problem solving techniques
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| 1. Teams define their team’s working approaches
	1. Team Charters
	2. Team Ground Rules
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| 1. Refine the vision and mission working collaboratively with key stakeholders, and organizational influencers to ensure broad acceptance
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| 1. Team report out sessions and process check
	1. Value Proposition
	2. Team initial project plans and team working approach
		1. Team charters and ground rules
	3. Next Steps to move towards Focusing
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# Focusing Project Plan – Finalizing Designs and the Start of Systems Development and Deployment Template

| **Project Step** | **Responsibility** | **Date Planned** | **Date Complete** |
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| 1. Develop organizational strategy maps that define the elements that accomplish the mission
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| 1. Disaggregate the Mission and Vision into Strategy and Tactics by developing subsequent strategy and process maps
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| 1. Select and implement Management Action Teams (MAT) that cooperate to affect the communication plan, roll out strategy, develop leaders and align the organization
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| 1. Utilizing SMEs, design and begin development of systems that transform the strategies into day-to-day operational tactics
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| 1. Utilizing the process maps created for systems, identify the roles and responsibilities including the associated time horizons for each organizational layer and position, develop metrics and behavioral anchors aligned to the strategy map(s)
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| 1. Begin the deployment of systems
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| * 1. Conduct initial training of operations
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| * 1. Explain the roles and responsibilities for each position including interrelations of systems and the obligations to upstream processes and downstream customers
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| * 1. Ensure that each system has measurement devices and/or methods capable of accurately monitoring and recording each essential parameter
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| * 1. Ensure systems response feedback loops are sufficient to allow operators a timely view to each process
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| 1. Develop initial goals for each position
 |  |  |  |
| * 1. Based upon the initial parameters set for each system, develop Key Performance Indicators (KPIs)
 |  |  |  |
| 1. Set up focus sessions to receive feedback to the effectiveness of each newly deployed system
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| * 1. Pay particular attention to the “seams” between processes that can be fall points where outputs from one system don’t feed the downstream system in a timely manner
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| 1. Use a systematic problem solving to adapt your systems as required and appropriate based upon the functionality and effectiveness of the system
 |  |  |  |
| * 1. Adjust the goals as necessary based upon system modifications
 |  |  |  |
| 1. Ensure project teams and SMEs document system and procedural changes to capture “As Designed” as compared to “As Built / Implemented”
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# Committing Project Plan – Deployment & Targeted Training Template

| **Project Step** | **Responsibility** | **Date Planned** | **Date Complete** |
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| 1. Establish appropriate Spans of Control and Limits of Authority for every position and aspect of organizational performance
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| 1. Ensure each system is monitored via “Timely View to the Processes”
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| * 1. Identify Leading Key Performance Indicators
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| * 1. Identify Trigger points
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| * 1. Outline the appropriate responses to key triggers
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| 1. Develop Training Strategy and Process
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| * 1. Utilize the strategy maps, process flowcharts, and any procedures, manuals, plans, and policies as well as other materials to conduct a DACUM to form the basis for Training Checklists
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| * 1. Develop the Essential Elements of Training (just enough – more formalized materials will be created to codify the final procedures during the Sustaining Phase)
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| 1. Broadly roll out training throughout the organization. Utilize the SMEs and others integral in the design of the process as trainers
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| * 1. Conduct Principles and Systems training to lay the foundation of solid understanding throughout the organization
 |  |  |  |
| * 1. Analyze gaps between Training Checklists and individual performance to develop Individual Development Plans
 |  |  |  |
| * 1. Implement Structured On the Job training to conduct targeted training as necessary to fill the gaps and build support – just in time and just enough
 |  |  |  |
| 1. Continue to engage the Management Action Teams (MAT) created during Focusing to monitor, mentor, and support the growing skills
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| * 1. Establish consistent managerial norms regarding “Logical Consequences”
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| * 1. Ensure ongoing engagement, involvement, and awareness of leaders in the fledgling processes, procedures, and the nascent culture growing within the organization
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| * 1. Reinforce behaviors and demonstration of excellence, address lapses as they emerge through intervention
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# Sustaining Project Plan – Institutionalizing and Optimizing Template

| **Project Step** | **Responsibility** | **Date Planned** | **Date Complete** |
| --- | --- | --- | --- |
| 1. Establish regular and ongoing evaluations customer and key stakeholder requirements and satisfaction
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| 1. Implement process for regular verification and alignment department and individual goals to drive delivery of the organization’s value proposition
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| 1. Documentation of policies and procedures to include regular review and revision
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| * 1. Prioritization of documentation requirements
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| * 1. Ongoing procedural review
 |  |  |  |
| * 1. Ready access to documentation
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| * 1. Effective change notification process
 |  |  |  |
| 1. Evaluate lines of communications – revise as needed
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| 1. Ensure an ongoing and holistic view to the process
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| * 1. Implementation of “Balanced Scorecard” reporting
 |  |  |  |
| * 1. Implementation of “Dashboard” technology to automate the view to the proves
 |  |  |  |
| 1. Establish / codify vendor and supplier review and feedback processes
 |  |  |  |
| 1. Introduction and implementation of LSS Concepts:
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| * 1. Implementation of 5S
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| * 1. Implement Visual Management
 |  |  |  |
| * 1. Conducting Value Stream Mapping
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| 1. Ensure managers and leaders maintain the cascading lines of communication within their areas and managing according to a climate of “logical consequences”
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# Renewal Plan – Refitting and Redeploying Template

| **Project Step** | **Responsibility** | **Date Planned** | **Date Complete** |
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| 1. Evaluate your communication processes and practices. Ensure individual and organizational successes are broadly shared and documented
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| 1. Celebrate organizational successes in a way that is significant to whomever is being recognized
 |  |  |  |
| 1. Evaluate internal and external auditing processes. Ensure that there is appropriate documentation and follow up to audit findings
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| 1. Benchmark competitors as well as customer alternatives. Incorporate findings into goals and action plans
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| 1. Review the ROI of past process improvement projects and initiatives. Ensure ROI is consistently used as a justification and validation of projects
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| 1. Utilize Meeting Assessments to gauge the effectiveness of meetings. Address shortfalls and ineffective practices
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| 1. Review and evaluate the Performance Review and Reward processes to ensure consistency and the judicious application of logical consequences
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| 1. Evaluate the organization’s learning climate, processes, and degree of engagement. Verify Career Pathways are planned and utilized
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| 1. Audit the effectiveness of the training process and practices
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| 1. Review the hiring process to ensure it effectively incorporates the elements of TCLs
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| 1. Evaluate the process and outcomes of New Hire Orientation. Ensure ongoing enculturation and inclusion of new hires to establish the line of sight to the value proposition
 |  |  |  |
| 1. Review and evaluate the succession planning process. Benchmark mentoring and adapt into the organization
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