Starting a Process Improvement Project

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| Department |  |
| Executive Sponsor |  |
| Process Name |  |
| Process Owner |  |
| What does this process achieve? |  |
| How critical is this process for our business? |  |
| How critical is this process for our customers? |  |

## Who will sign off the requirements and final production for this process?

*It is vital to ensure top management is committed to process improvement and give their full support to the project.*

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| Executive Sponsor |  | Process Owner |  |
| Region (If Applicable) |  | Region (If Applicable) |  |
| Department |  | Department (If Applicable) |  |
| Job Title |  | Job Title |  |
| Full Name |  | Full Name |  |
| E-Mail Address |  | E-Mail Address |  |
| Mobile Number |  | Mobile Number |  |

## Who is included in this process?

*List all the team members, their department and the function that they play in the process. Their feedback and buy-in will contribute to the success of the project.*

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| Team Member | Department | Function in Process |
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## What industry are you in?

*What unique rules and considerations apply to your industry?*

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## How will the success of the process be determined?

*What measurable improvements do you wish to see (time, cost, resource savings)?*

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## What is the value of the process to your customers or business?

*Processes should directly contribute to fulfilling customer needs or strategic business objectives. Tasks in the process that are not clearly contributing to these goal should be either removed or be improved.*

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## How do users experience the process?

*Consider the following from a user’s perspective when documenting a process.*

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| **Knowledge** | The knowledge I need to do my work. |
| **Context** | The context I am working in (adding a debtor, processing a customer’s application form). |
| **Sequence** | The logical steps I must follow to do my job effectively. |
| **Workflow** | The information that passes in and out of my work area. |
| **Transactions** | Define the start and commit points at which workflows become transactions and the rollback possibilities |
| **Messaging** | What are the current methods of coordinating your transactions – often via email. |
| **Network** | The medium through which the messages move. |

## How does the process currently work?

*The intention is to understand how the process works today, therefore, it is important to have all relevant parties participate in mapping the process.*

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## Where does the process start and end?

*Confirm that everyone involved in the process understands both their part, and the purpose of the entire process. This motivates people to be more proactive in process improvement and will similarly make the work more meaningful to them, as they will appreciate how their role influences the big picture.*

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## Which business units participate in the process?

*Understand who the stakeholders are and how complex the process will be. The general rule is the more units, the more complex the process will be.*

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## Who are the participants in the process, what are their roles?

*The correct people should be doing the correct work. This is why it is important to have individuals from all parts of the process participating, as they may perform tasks that others don’t know of, and therefore couldn’t model them into process map.*

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## What information flows from one person to another?

*This will help you determine what data fields are required and what the screens should look like. You could be dealing with complex sets of data. Question why these information flows happen and whether they are truly useful.*

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## With which internal and external systems will this process interact/integrate?

*Integration is a tool for providing successful customer outcomes. Identify what systems will require integration or interaction, at what point and to what end.*

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## What business rules are associated with the process?

*How often do they change? Are they still relevant?*

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## What documents are required by or associated with the process?

*Gather all the document templates and review, there may be steps or fields in the documents that are redundant.*

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## What are your reporting requirements?

*Data layouts and process routing could depend on reporting requirements. If users require reports on a business unit or a region this information must be incorporated into workflow fields. It is crucial that KPIs are aligned with successful customer outcomes.*

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## What are your implementation time lines and constraints?

*Be sure you keep timelines realistic.*

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