



Sample Chapter from “How to Identify and Charter a Lean Six Sigma Project – Tips and Tricks Learned the Hard Way”

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Note to Reader

This is a free chapter from the book “How to Identify and Charter a Lean Six Sigma Project – Tips and Tricks Learned the Hard Way” by Keith Johnson. The full edition can be read in less than an hour. It can be purchased from our website www.rapidci.com or through Amazon, Barnes & Noble or Kobo. Thank you for downloading, and enjoy!

Chapter 3 – Top Down Project Selection Workshops

This workshop should occur once, either at the enterprise level or within a major business function. Repeat it annually to refill the project pipeline.

Preparation

The critical path is scheduling all the executives into a 90-minute workshop. It helps to have the assistance of an executive assistant, since they coordinate these events all the time and know how to work the schedules and the meeting rooms.

In the meeting invitation, send a description of what makes a good lean six sigma project. If you give everyone a copy of this book, that list is on page one (the entire project identification section takes less than 30 minutes to read).

The champion should develop a fact base that top leadership will use to identify strategic, customer, financial and process opportunities during the workshop.



This fact base should include the following kinds of information:

- Strategy - annual goals, strategic planning documents
- Customers - customer meeting database, call center data, customer complaint, list of key customers
- Financials - budget, profit and loss statements, any other reports to understand where the money lives
- Processes - core value stream maps of the business (may need to be developed), list of core processes and functions, scorecards, inventory information

Provide an electronic copy to the workshop attendees in advance, and bring hardcopies to the workshop.

The meeting room will need post-it notes, two flipcharts, markers, highlighters, pens. A laptop and projector (to project the fact base) is optional.

You should provide refreshments such as water, coffee and soft drinks. Food is optional, although fresh fruit and candy provide an energy boost for brainstorming.

Tip: Unless there are internal experts that have run this kind of workshop before, it is very useful to contract an external lean six sigma deployment expert to help prepare and facilitate the actual meeting.



Workshop

Agenda for the workshop:

Kickoff and expectations 5 min

Review fact base, discuss what makes a good lean six sigma project and give instructions for filling out post-it notes 15 min

Develop opportunities 20 min

Explain benefit-effort matrix 5min

Share & prioritize the opportunities 30 min

Next steps 15 min

The top leader in the room should kick off the workshop and set the expectations.

The deployment champion reminds the group what makes a good lean six sigma project and explain the fact base. Tell them to capture their ideas on post-it notes.

Participants should work individually to develop lean six sigma opportunities based on the fact base, and document on post-its.

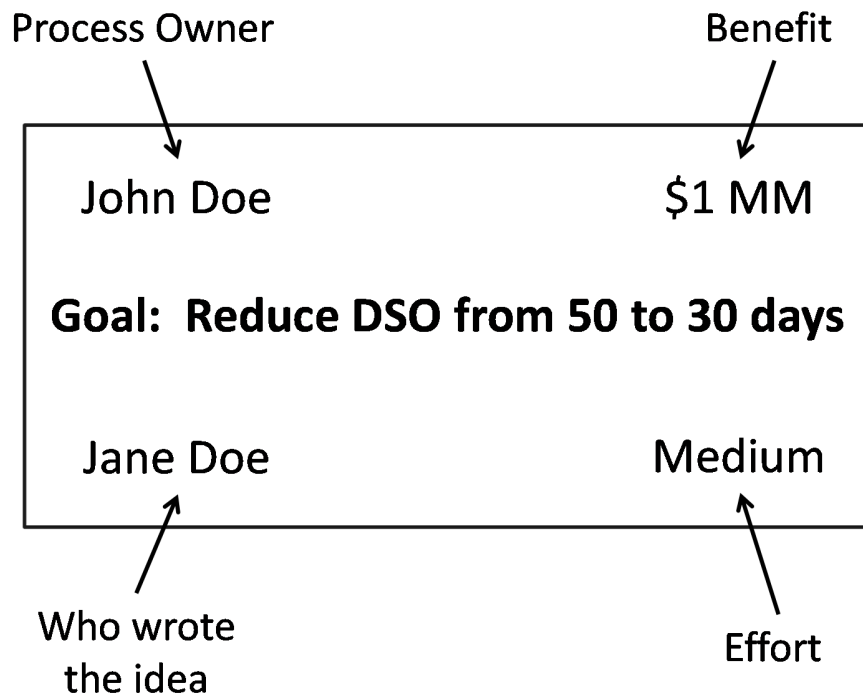


Figure 2 - Opportunity post-it note

The key information includes:

- Name of process owner
- Name of the person who wrote the idea
- Problem / Opportunity / Goal statement
- Benefit (in local currency)
- Effort (High/Medium/Low)

Pick the benefits scale for high, medium, low based on the highest benefit opportunities.

Leave the effort scale at high, medium and low. Explain that effort is a combination of resources required, complexity and time to complete the project.



The facilitators should circulate around the room, helping to clarify opportunities that could become good lean six sigma projects.

Trick: tell them they each have to write at least 10 post-it notes. This expectation will help them get past their first 2-3 ideas and become the start of a solid project pipeline.

While they are creating post-it notes, take four pages of flipchart paper and hang them on the wall to make a large square. Draw a chart, with the Y-axis labeled "Benefit" and the X-axis labeled "Effort".

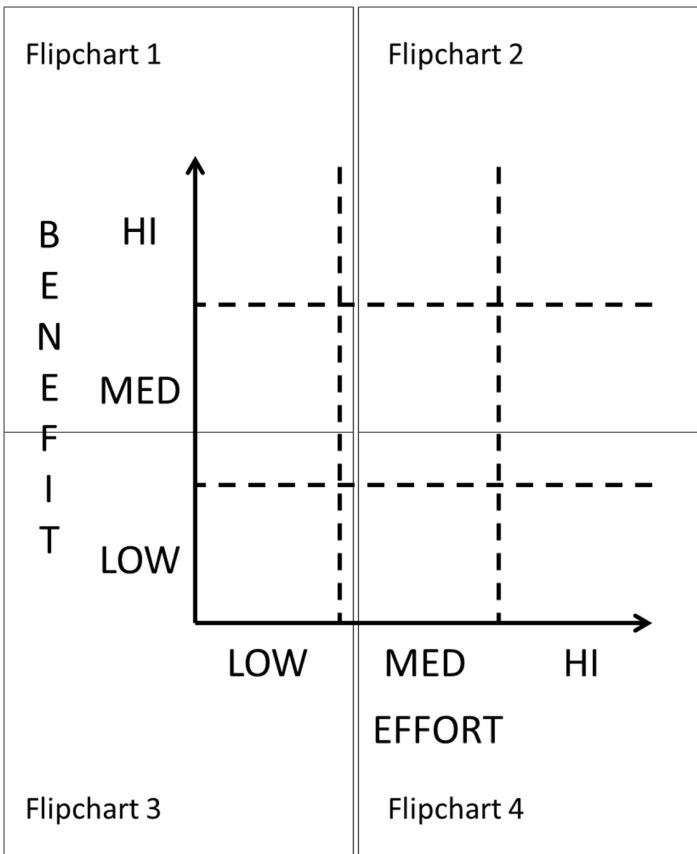


Figure 3 - Benefit Effort matrix on flipcharts



When the exercise is over, ask a volunteer to plot their post-it notes on the benefit effort matrix, and explain each one as they place it on the wall. Repeat until everyone's post-it notes are on the wall.

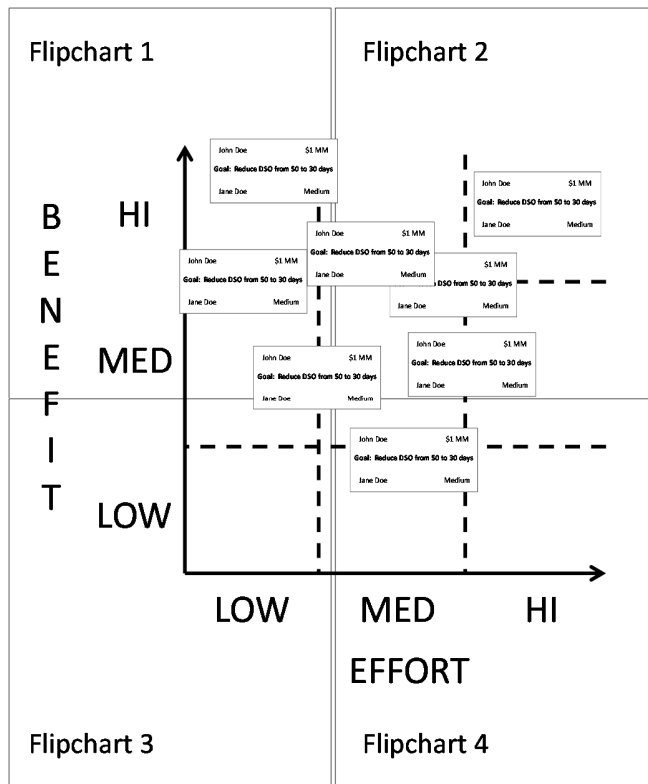


Figure 4 - Benefit Effort matrix with post-its

It will take time to hear all the ideas (and may trigger some new ones). This is the most valuable part of the workshop because these ideas have been developed, prioritized and are now owned by the leadership team. Highlight the high benefit, low effort ideas. If any are missing the name of the process owner, ask the team who that is (or who it should be, if none exists) and add it to the post-it note.

Tip: Count the number of ideas and add up the estimated benefits from the benefit effort matrix, it is usually more than people expected. Thank them for their work!



Explain the next steps, which should be to schedule one-hour bottom-up workshops with each of their teams. Some of the ideas generated in the workshop have reasonable scope, but many will be broad project areas.

Follow-up

Take pictures of all the flipcharts developed during the workshop. Add each opportunity area to the project pipeline (excel spreadsheets work), along with all the information from each post-it note.

Identify which leaders will sponsor lean six sigma projects in their area. Schedule 45-minute Bottom-Up Workshops with each leader plus that person's direct staff.

Tip: Ask each leader to confirm who to invite and how to schedule the meeting. Send the invitation immediately while this is fresh in their minds.

Conclusions

We hope you find this sample chapter useful. The entire table of contents for the book is listed on the following page.

Keith Johnson

Bestselling Author of “How to Identify and Charter a Lean Six Sigma Project” and Founder of RCI Consulting

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