

Recommended Steps for Successful Process Improvement

Process Improvement (PI) requires investments that are particularly demanding, therefore you should carefully select and carry out improvement activities in a controlled way, so that the risk of failed improvements is minimised. Focusing on specific improvement objectives allows organisations to conduct progressive improvements while limiting the investment in effort and other costs. In this way improvement becomes a continuous exercise that should be continuously used to enhance the organisation processes as needs and the business environment change.

Listed below are the recommended steps to be followed to assist in implementing a successful process improvement programme.

Step 1 - Initiate Improvement Program

Critical groundwork is completed during this step. The business reasons for change are clearly defined as effective process improvement must be driven by the organisation needs and business goals. The support of critical managers is secured and an infrastructure for managing and implementing the improvement program is put in place.

- Identify the business needs and drivers for process improvement
- Document high level Improvement Plan i.e. general improvement goals & objectives established from business needs of your organisation – this ensures your PI program is linked to your business goals
- Educate all staff members on reasons for and benefits of process improvement and change principles - this will help to build support and assess the climate for change
- Provide orientation to business units on benefits of and reasons for PI.
- Obtain senior management approval for Improvement Plan and their commitment on the allocation of time and resources necessary
- Establish required infrastructure for implementing improvements and assign appropriate resources i.e.
 - Management Steering Committee (MSC)
 - Process Group (PG)
- Communicate the start of the PI initiative to all staff and business units.

Step 2 – Evaluate Current Practices

This step involves gaining a complete understanding of the current state of practices within an organisation. Once this is understood then the organisation can prioritise and plan how to progress forward.

- Plan & perform baseline assessment (is recommended to use a recognised model such as the CMMI).
- Present findings and recommendations to organisation

- Process Group evaluate recommendations, prioritise, agree, plan & schedule key tasks required to implement them – agree key milestones for each improvement area.
- Establish process and measurement baselines i.e. what measurements are currently being collected and what is content of current procedure, policies and process definitions.
- Plan improvements (PI plan in greater detail) & measurements to be taken - ensure consider central location for storage of all measurements (i.e. a process database).
- Communicate plan to all staff.
- Set up Process Improvement Teams (PITs) required to implement improvements and assign resources. Resources should be those involved in the area for improvement. Include resources with expertise in that area. Each PIT should contain a representative from each of the groups.

Step 3 - Establish New Processes

The activities in this step ensure the implementation of the work that has been planned and prioritised in previous steps.

- Kick-off Process Group and document their own procedures and guidelines
- Kick-off Process Improvement Teams - PIT and agree and document detailed plan for tasks & agree key milestones
- Ensure each PIT understands their objectives & goals – provide training if necessary
- Workshops for each PIT to agree and define process for their area of improvement
- Each PIT define solutions for areas prioritised in PI plan
- Solutions reviewed with Peers and Process Group
- Pilot solutions on appropriate projects & make amendments as necessary
- Train appropriate members of staff on new processes and ensure anyone not directly involved in the use of the processes is aware of their existence and purpose
- Formally release new processes for use to whole organisation – ensure are centrally available

Step 4 – Learn

This step evaluates whether planned targets have been achieved and expected benefits have been delivered. Remember process improvement is a continuous activity, which supports your organisation to continuously evolve to meet its business goals. Therefore, once an improvement cycle has been completed, that is the time to think again what are the organisation's objectives and what can be improved to better achieve them. Then a new improvement cycle can be started.

- Monitor use of new processes on a regular basis

- Provide on-going mechanism for 'Change Requests' to be raised, analysed, reviewed and implemented as necessary
- Gather lessons learned from relevant users of new processes
- Highlight successes
- Plan 'Round 2' based on improvements required