

Implementation Plan

Response ID:10 Data

2. Step 1 - Clarify the problem

1. What is your name?

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2. Define the ultimate goal of the process you're trying to improve:

I would like to have a system to gather all of the client projects that we have to do so that they can be efficiently controlled and delegated for optimal customer service.

3. Define the *Current Situation*:

Clients give us requests for information by mail, text, email, phone or osmosis(we did it last year). Different people in my office know about different things to do and there is no combined system to accumulate them.

4. Define the *Ideal Situation*:

All projects and client requests would be set up in a simple and comprehensive system that everyone can see, act on and insure that all client service projects get finished on time and delighting the client.

5. Visualize the gap between your *Current Situation* and your *Ideal Situation*. This defines your *Problem Statement*; articulate it below:

Our gap is the lack of knowledge of what needs to be done by different team members.

3. Step 3 - Break down the problem

6. Break the problem down into chunks, and list the highest priority component below:

Find the best software that is simple and interactive that will be shared among my team.

7. Specify the *Point of Occurrence* by studying the problem in a real world scenario, where the work takes place. Once you've identified it, list it below:

All client interactions will be logged into the software with next steps and projects to be completed.

4. Step 3 - Identify the target setting

8. Set measurable, concrete and challenging targets that will help move you towards your *Ideal Situation*, and commit to action. List your target(s) below:

The target is all work is done off of the project tracking software.

5. Step 4 - Conduct a root cause analysis

9. Examine the *Point of Occurrence* and objectively consider possible causes. List them below:

Possible causes are:

- lack of appropriate software
- too busy to write down projects
- lack of discipline

10. Gather facts from your 'genba', and keep asking 'why?' at each level until you're able to isolate the root cause. Write it

down:

The root cause is that we don't have a simple system to track projects.

6. Step 5 - Develop countermeasures and process KPIs

11. Brainstorm as many countermeasure ideas as possible in the space below:

The countermeasures would include:

- Weekly meeting to evaluate what wasn't working
- Team review of each other's time reports to determine what wasn't logged in
- Digging on why things aren't logged in.

12. Shorten your list to include only the highest value-add countermeasures, and write them down:

Weekly meeting and review of each other's time reports

13. Discuss with your team which of the countermeasures on your shortlist makes the most sense to adopt. Once you've reached a consensus, list it here:

weekly meeting

14. Write out a clear and concise plan of action:

We will set up the right software to gather client projects. We will then institute systems and processes to log all projects and move those projects to the next level.

8. (untitled)

15. Do you have any other process improvement tips that could benefit the community?

16. Community learning is almost as powerful as learning from the thought leaders. We encourage you to share your implementation plans and progress as some leaders may be struggling with problems you've already overcome. Would you like to share your plan with the community?

Yes, I'd like to make my plan available to Scaling Up Club members.

17. Please include your email address so we can send you your plan:

trfitz@fitz-net.com

18. How much extra revenue do you expect to generate after fully implementing this plan?

(options below in USD)

\$50k - \$100k