

3 – Assess

Now that we have our project team formed, a project manager named, and a charter in place we're ready to start. The initial meeting will be where we want to get more specific on which processes need to be documented or improved and prioritize our list.

For a small business or office this may be simple while for a larger or more established office this may still seem like a large mountain to climb. The best starting point tends to be either a brainstorming session to identify common activities or processes or start at the very beginning, e.g., imagine a new employee coming into the organization and you have to give them an orientation and show them how to do their job. The orientation itself is a process – organization overview, the organization's mission, leadership/management overview, equipment/uniforms, identification cards, passwords, etc. The employees' job functions: preparing invoices, writing proposals, preparing food products for customers. These are all processes that have a series of resources, materials, or references used, the employee will do certain actions in a somewhat certain order, and there will be an end result (an output) such as a submitted invoice, a memo, or a hot tea for a customer.

You do not have to have every process identified in this early session. In the beginning, we just need a few to get the project teams working. Remember that the Project Manager will be responsible for maintaining a running log of processes and more will be identified as time goes on. This is going to be the Process Improvement Log. The Process Improvement Log can be (and should be) as simple as a physical notebook, or an electronic document, and is a running list of identified processes that need to be evaluated.

Once a list of processes or activities has been prepared, it is best to prioritize them. There is no hard and fast rule on what takes priority – use your best judgment or, even better, allow the project manager and the team to use theirs. Consider how critical a process is, but also consider how complicated it is or how complicated you believe it is. Initially we want to focus on more simple processes which will allow the team to practice working together, using ASI, and mapping processes. Don't be too ambitious in the beginning. If you or the team selects a long process or one that is overly complicated, frustration can easily break excitement and morale. Start off simple to get people used to using the ASI process.

As mentioned before, the new staff orientation is likely a good starting point as many higher-level processes are going to be dependent on staff members having some basic tools and access at their disposal. Starting with orientation builds a solid foundation and builds up the project team's confidence since many will be familiar with what needs to occur and can contribute.

A common request or topic brought up in process improvement efforts is metrics or using numbers to make judgements on how good, bad, or successful an organization or process is performing. One of the reasons people are scared of process improvement is that many times metrics are brought up early and either the staff's eyes glaze over from boredom or anxiety builds from fear of judgement. Metrics do have their place in measuring the success of an organization and within process improvement, but it is cited much too often by those with limited understanding of how to properly use them to help (instead of judge) and organization and its staff. Many times, the metrics that are in place are weak or even irrelevant. The vast majority of businesses can be run and improved successfully with very simple and very basic metrics. If processes do not exist, are inconsistent, or not followed, metrics are not going to tell you much of anything and comparing current metrics to future ones, while possible, are beyond the

necessary expertise of most owners and managers. For now, our focus is on the processes; we will incorporate metrics and measurements later.

The initial projects or processes will likely be very obvious to you and your staff, but as the overall process improvement project evolves, more complicated processes will come up and prioritization will be difficult. At this point, trust yourself and use your best judgement. Do not waste time trying to decide between one, two, or three processes. Pick the one you think is most important, commit, and go with it.

Sidebar - There may be times when it's not as obvious or the list is huge. In these instances, ranked voting is a useful tool. Each team member can have five votes and use any combination of votes to select the most important or which processes ought to be addressed first. If a process receives no votes, do not erase or remove it. It simply goes to the bottom of the list. For larger lists, multiple rounds of voting are fine to eventually come up with the top or a group of top processes.

Some other considerations with coming up with processes or areas in which to improve. Think about your business as a whole – What do we do? What are we known for? Who is our customer? What do they want or need from us? What do they expect?

These are more business and strategic planning types of questions, but they can help you think from the perspective of your customers and consider what is more important to them versus what is more important to you. You may want your invoicing and accounts receivables tracked and up to date, but your customers want a quality and consistent product that they value. You can have the best accounting process in the world, but if your customers are not getting what they want, then it doesn't matter!

For a smaller organization you will likely start with a single process. For larger organizations you can kick-off multiple process improvements at the same time. In these instances, consider assigning a project manager for each of these efforts and let the original project manager become the head project manager to oversee each PM. If you have the staff and they are ready, willing, and able, you do not need or want to put them all on one small process. Split them up and assign them each a process to work on.

As a running example through this book, we're going to use the process of making tea. Imagine we're running a café and we know tea is a common, and profitable, item ordered by our customers, but each employee does it 'their way', and every few days customers ask to get their tea heated up, cooled with ice, or some other issue. We need to make the tea consistent, so let's begin...