w5.1- Postmortem (3:16)

w5.1- Postmortem (3:16).mp4

Topics

- Adequacy of resources
- Effectiveness
- Tracking of deliverables
- Communication
- Teamwork
- Recognition
- Alignment

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Some of the fundamental review topics will

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This transcript from the Six Sigma Black Belt course (Module 5) focuses on the **postmortem review** as a critical component of the "Control and Improvement" phase.

Key Takeaways

1. The Purpose of a Postmortem

A postmortem is a formal review involving managers, stakeholders, and project leaders. Its primary goal is to foster **continuous improvement** by analyzing the entire project lifecycle—from inception to completion—to understand what worked and what didn't.

2. Core Review Topics

The critique evaluates several operational and interpersonal factors:

- **Resources:** Adequacy of personnel, time, equipment, and budget.

- **Management:** Tracking effectiveness and communication with top leadership.

- **Teamwork:** The quality of collaboration and whether member contributions were recognized.

- **Alignment:** How closely the final results matched the original objectives.

3. Measuring Success

While performance is measured on **results rather than effort**, success is traditionally judged by three criteria:

1. **Goals:** Were the objectives met?

2. **Schedule:** Was it completed by the deadline?

3. **Cost:** Was it at or below budget?

   Note: A project can still be considered "successful" even if it misses these marks, provided it delivers significant business value. In such cases, follow-up projects may be launched to capture remaining objectives.

4. Beyond the Project Scope

Postmortem reviews are not just for closing a file; they are used to:

- **Adapt:** Apply the team's experience to future issues.

- **Standardize:** Identify other areas in the organization that could benefit from similar improvements.

w5.2- Document Management (4:59)

w5.2- Document Management (4:59).mp4

Module 5 - Lesson 2

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But it can be very complex to maintain and control within standards

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w5.2- Document Management (4:59).mp4

Components of Document Management

- Identification and seizure of documents for incorporation
- Storing and archiving of documentation
- Index and retrieval mechanisms for documents
- Distribution of documents
- Protection of documents from authorized access or catastrophic events
- Basis for audit trails

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There are six basic components of the document management system.

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w5.2- Document Management (4:59).mp4

Benefits of Document Management

- Improves productivity
- Reduce costs
- Fosters sharing of knowledge and information
- Improves corporate transparency and governance
- Easy and effective dissemination and access
- Compact means for storage and retrieval

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U N I V E R S I T Y

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w5.2- Document Management (4:59).mp4

Documents and Records

- Documents
  - Communicate policies, processes, and procedures
  - Must be under revision contro
- Records
  - Capture data resulting from requirements set forth in work instructions and procedures
  - Do not change

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Documents communicate policies, processes and

00:02:13 / 00:04:59   85

w5.2- Document Management (4:59).mp4

Policies

- Outline "what to do"
- Encompass the organizational mission, goals, and purpose
- Framework for the quality system
- Cited in the quality manual

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Panel policies outline what we do and
serve as the framework for

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Processes

- Outline the steps involved to uphold the quality policies
- Flow charts can be very useful
- Series of steps designed to carry out a task

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Processes defined how we do things.

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w5.2- Document Management (4:59).mp4

Procedures

- Standard operating procedures (SOP)
  - step-by-step instructions for performing a single activity
- Job aid
  - a shortened version of the SOP
  - does not replace the SOP

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Typical procedures are SOPs or job aids.

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w5.2- Document Management (4:59).mp4

Importance of Documents

- Uniform understanding
- Consensus
- Foundation for training, awareness, and engagement
- Grounded in the critical steps needed to satisfy the customer
- Superior to verbal instructions

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16

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85

w5.2- Document Management (4:59).mp4

Common Document Control Problems

- Old revisions of documents in use

- High distribution creates barriers to control

- Poor control of documents of external and internal origin

- Lack of stakeholder involvement

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Some of the more common issues include the use of obsolete versions of

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00:04:07 / 00:04:59   85

This transcript highlights the importance of **Document Management (DM)** and **Document Control** as pillars of quality standards like ISO 9001. It emphasizes that a strong document control department is essential for sustaining continuous improvement and organizational transparency.

1. Defining Document Management

Document management covers the entire lifecycle of a document—creation, modification, and obsolescence.

- **Media Types:** Can be paper, electronic, databases, spreadsheets, or work instructions.

- **Purpose:** Ensures the most current versions are available, maintains process control, and captures institutional knowledge.

2. Six Components of DM Systems

A robust system must address these six areas:

1. **Identification:** Properly naming and categorizing.

2. **Storage:** Secure housing of information.

3. **Archiving:** Preserving older data for legal or historical needs.

4. **Distribution/Retrieval:** Getting the right info to the right people quickly.

5. **Protection:** Safeguarding sensitive data.

6. **Audit Control:** Tracking changes and access.

3. Key Distinctions and Hierarchy

The text makes a vital distinction between how information is categorized:

- **Documents vs. Records:** Documents (policies/procedures) define **what should happen** and require control. Records (data outputs) capture **what did happen** and generally do not require version control.

- **Policies:** The "What" (Mission, goals, framework).

- **Processes:** The "How" (Method for driving improvement).

- **Procedures (SOPs & Job Aids):** The "Steps." SOPs are detailed instructions; Job Aids are concise reminders of critical steps.

4. Benefits vs. Pitfalls

Benefits	Common Pitfalls
Enhanced productivity & lower costs	Use of **obsolete versions**
Better consensus/training than verbal	Excessive distribution (too many copies)
Improved corporate transparency	Poor control of external documents
Compact storage & easy access	Lack of stakeholder engagement

5. The "One Source" Model

To avoid conflicting information, the text advocates for a **One Source Model.** If the same information is cited in multiple places, a single change requires updating every document. By confining information to one source, an organization ensures consistency and simplifies revision control.

w5.3- Training (3:04)

w5.3- Training (3:04).mp4

Benefits

- Commitment to improve
- Enhanced knowledge
- Expectations
- Consistency
- Implement adjustments
- Support
- Continuously improve

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responsibilities benefits everyone in the organization.

00:02:29 / 00:03:04   85

This transcript outlines the strategic importance of **Training and Development** within the Six Sigma framework, emphasizing that training is an investment in agility and competitive advantage rather than just an expense.

1. The Purpose of Training

Training serves as the bridge between the **current state** of work and the **desired state**.

- **Continuous Process:** It should be ongoing for all employees, regardless of tenure.

- **Contingency Planning:** It acts as a safety net, ensuring critical jobs can be performed even if key personnel are unavailable.

- **Cross-Training:** Promotes workforce stability and increases the overall value of each employee to the organization.

2. Strategies for Effective Training

A successful training program should follow these four pillars:

- **Robust Curriculum:** Modularize content into "bite-sized" pieces and use a knowledge-transfer approach.

- **Interactive Environments:** Encourage peer-to-peer learning, which is often more effective than solo study.

- **Technology Integration:** Use digital tools for drilling, reinforcement, and practice.

- **Standardization:** Avoid "homegrown" instruction. Centralizing the curriculum ensures that **best practices** and "pockets of excellence" are shared across the entire organization.

3. Training for Process Change

When a process is modified, the training must be specific to the operators involved. To gain **buy-in**, the instruction should focus on:

- **The "What"**: What steps have changed?

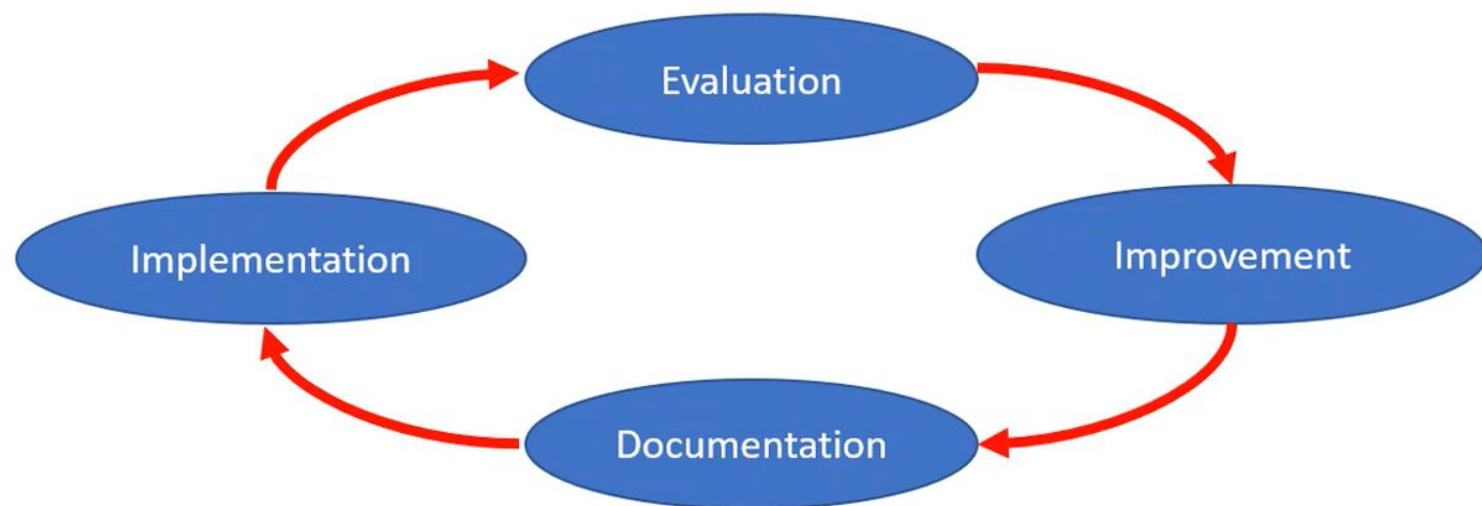- **The "Why"**: Why was the change made? (Understanding the intent drives commitment).

4. Key Benefits of Proper Training

Effective training does more than just teach a task; it provides:

- **Consistency:** Ensuring everyone performs a task the same way every time.

- **Operational Control:** Teaching workers how to adjust a process to reach desired performance levels.

- **Problem Resolution:** Clearly defining where to get help when a process goes out of control.

- **Documentation Audit:** Providing a natural opportunity to find and correct errors in the written SOPs or manuals.

w5.4- Ongoing Evaluation (2:08)

w5.4- Ongoing Evaluation (2:08).mp4

Improvement verses Monitoring

we always need to assess the
effectiveness of the change.

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This transcript highlights the necessity of **Ongoing Evaluation** as the engine behind continuous improvement in a Six Sigma environment. It emphasizes that for an improvement to be effective, it must be monitored, measured, and refined indefinitely.

1. The Continuous Improvement Cycle

Ongoing evaluation is described as a **theoretical, never-ending cycle**. Rather than a one-time event, it involves a constant rotation through four stages:

- **Implementation:** Putting the process or change into action.

- **Evaluation:** Checking the performance of the implemented change.

- **Improvement:** Refining the process based on evaluation findings.

- **Documentation:** Recording the changes to maintain standards.

2. Measurement and Monitoring

The text asserts that **improvement and monitoring are inseparable**. You cannot have one without the other because data from monitoring is what drives the next round of improvements.

Key Data Sources for Evaluation:

Organizations should use a "balanced mix" of metrics, including:

- **Operational:** Performance results, process capability, and quality results.

- **Strategic:** Customer requirements, benchmarking, and SWOT analysis.

- **Financial/Compliance:** Financial results and audit findings.

    Tip: The transcript notes that for management reporting, **graphs and charts** are far more effective than text or columns of raw numbers for identifying trends and issues.

3. Organizational Response

To truly benefit from ongoing evaluation, the organization must be structured to react to the data:

- **Oversight/Executive Committee:** A high-level group tasked with responding to both emerging problems and new opportunities.

- **Rapid Deployment Teams:** Specialized groups that can quickly address specific issues or leverage sudden opportunities discovered during evaluation.

4. Analytical Tools for Evaluation

The same tools used during the initial project phases remain vital for ongoing oversight:

- **Gap Analysis:** Identifying the distance between current and desired performance.

- **Root Cause Analysis:** Digging deep into why a process is failing to meet expectations.

- **Waste Analysis:** Identifying non-value-added activities (Lean principles).

	Strength	Weakness
Threats	**SO** Maxi-Maxi Strategies	**WO** Mini-Maxi Strategies
Opportunities	**ST** Maxi-Mini Strategies	**WT** Mini-Mini Strategies