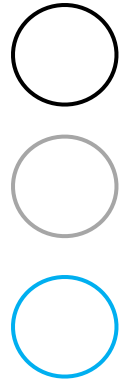


Barrington Consulting



Planning and Facilitating and Value Stream Mapping Workshop

Robert Newcombe

P.Eng, MBA, PMP, LSSBB



Introduction



Has a traditional value stream map not included **important details** about your processes?



Have you struggled to understand the **importance of cycle time** for your processes?



Have you completed a value stream map and **not realized any results** from it?

Agenda



1. Identification



2. Preparation



3. Facilitation



4. Execution

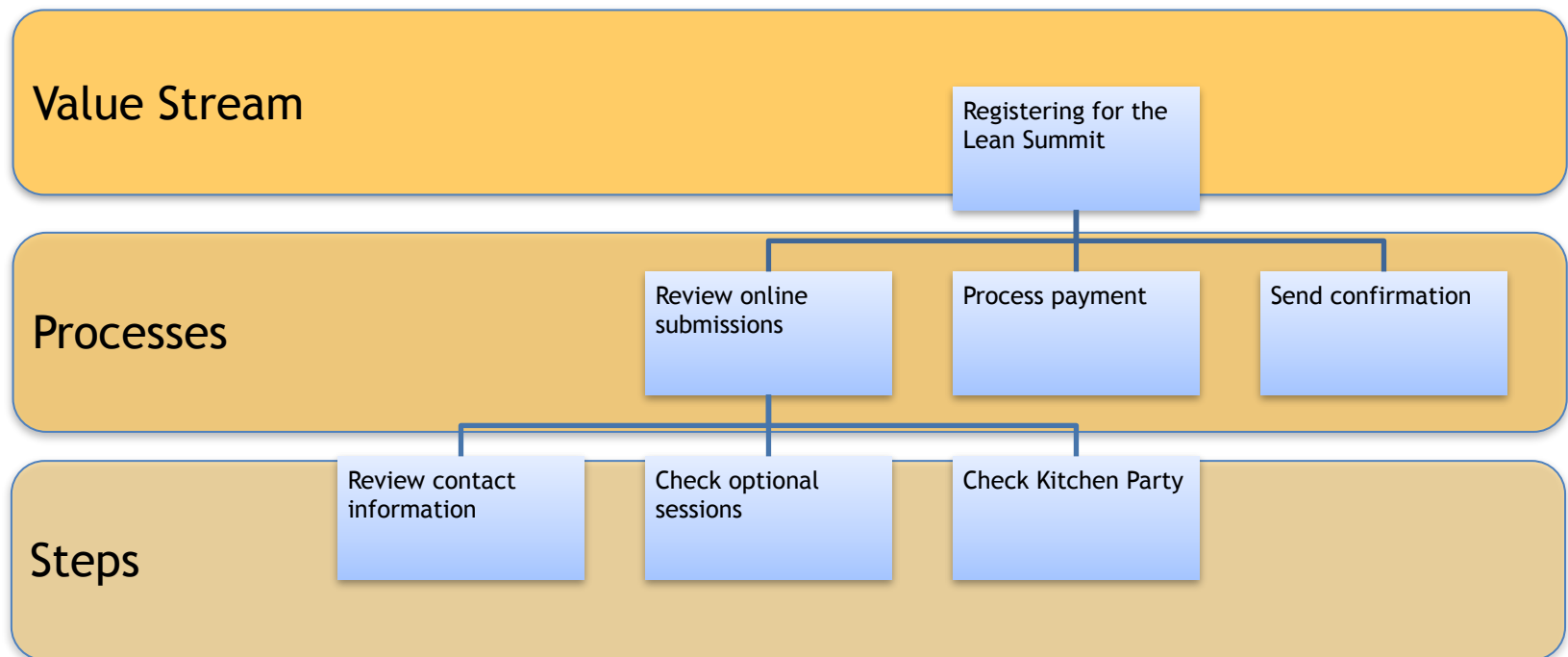


IDENTIFICATION



What is a Value Stream?

- The sequence of activities an organization undertakes to deliver on a customer request





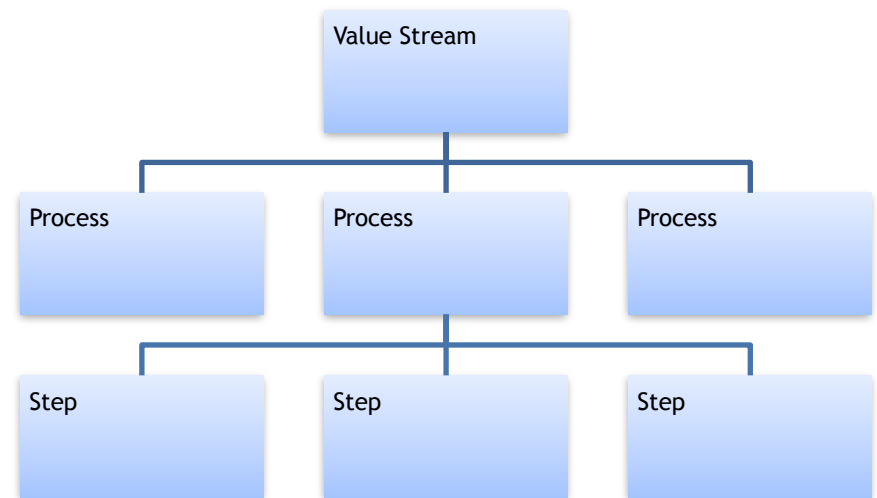
From Macro to Micro

Macro Perspective

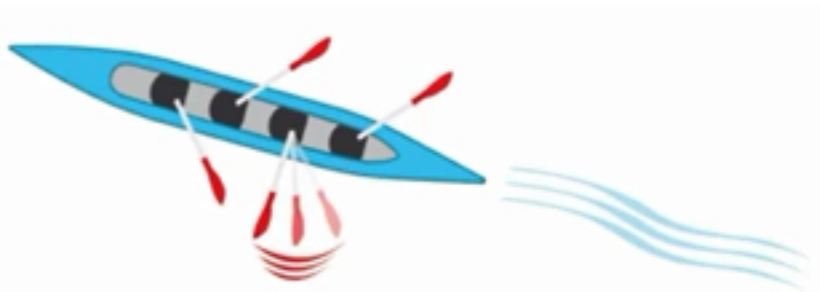
- Strategic direction (“what”)
- Heavy leadership involvement
- **Value Stream Mapping**

Micro Perspective

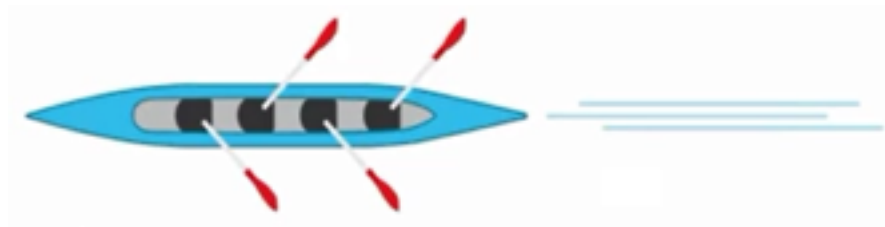
- Identify the tactical (“how”)
- Heavy frontline involvement
- **Kaizen Events (process mapping)**



Why Start with the Value Stream?



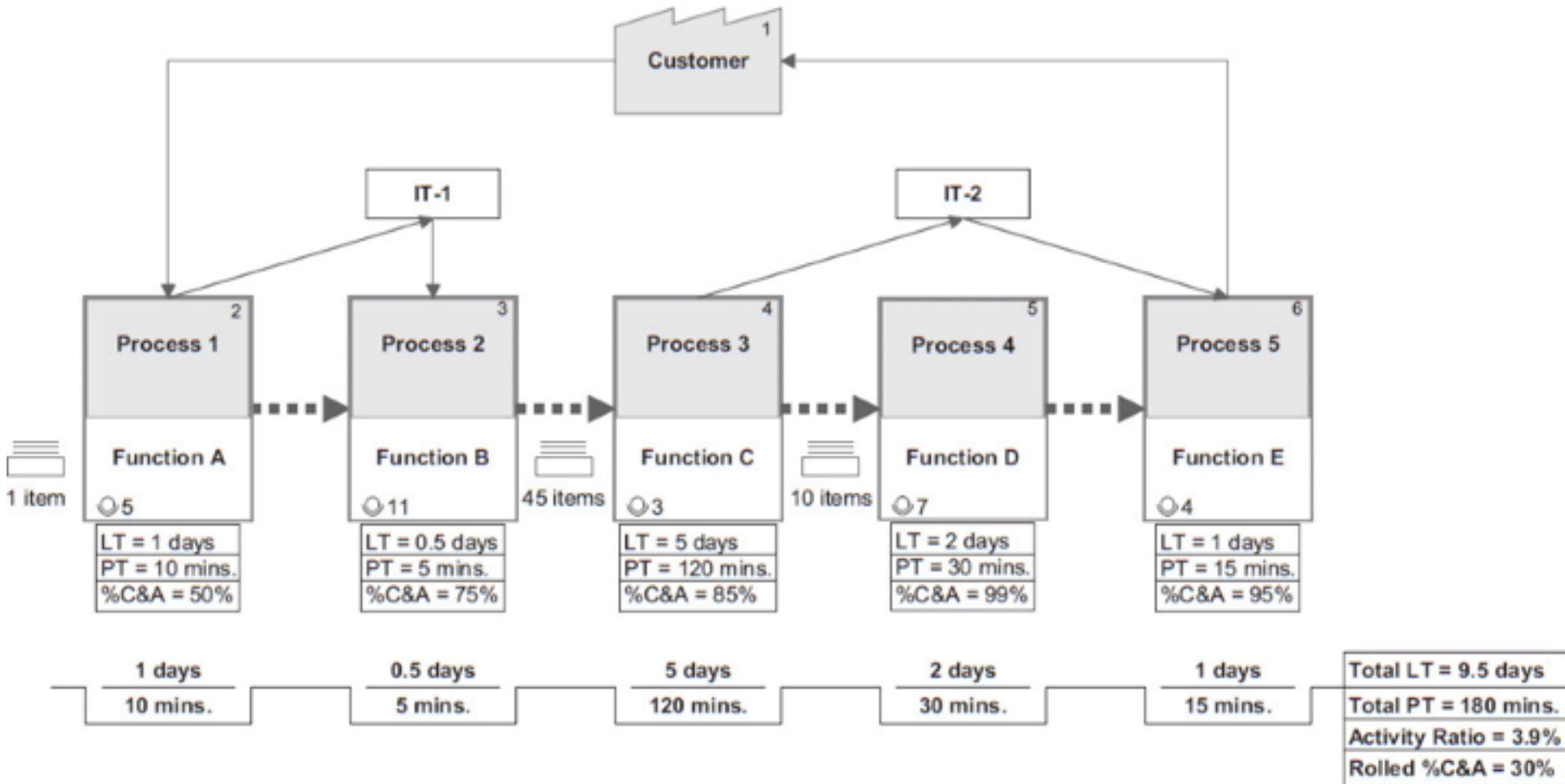
Individual Efficiency = Sub-optimization



System Efficiency = Optimal Value Stream Performance



ABC Technology, Inc.
Current State Value Stream Map
Name of Value Stream Being Mapped
Demand Rate = XX / Year
Name of Value Stream Champion
Mapping Date



When to Use Value Stream Mapping



Identify waste and bottleneck across a series of processes



Determine the lead time for a service to be provided (or a product to be produced)



Determine the total processing time for that service or product



Visualize the sequence of activities to deliver on a customer's request



Siloes are apparent throughout the value stream



When Not to Use Value Stream Mapping



The bottleneck is known - a Kaizen event may be more applicable to dig deeper into the process



The business does not have capacity to take on more projects



A solution is known



No leadership support



VSM Charter - The “WHY”

- **Current State Problems and Business Needs** - What’s driving the need for improvement?
- **Goals and Measurable Target Conditions** - Starting line. Finish line. Deadline. Reduce <defined metric> from X to Y (Z% improvement) by XX Date.
- **Benefits to Customers and Business** - How will the business, internal and external customers, and internal and external suppliers benefit from value stream improvement?



PREPARATION

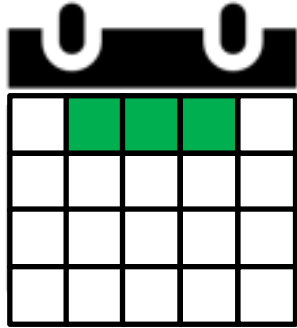
VSM Charter



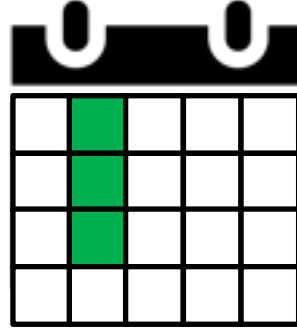
Charter				
Event Scope		Leadership		Schedule
Value Stream		Executive Sponsor		Event Dates and Times
Specific Conditions		Value Stream Champion		
Demand Rate		Facilitator		Location
Trigger		Logistics Coordinator		Meals Provided
First Step		Briefing attendees (**required, *optional)		Briefing Dates and Times
Last Step				
Boundaries & Limitations				
Improvement Timeframe				
Current State Problems & Business Needs		Mapping Team		
1		Function / Title	Name	Email / Phone Number
2		1		
3		2		
4		3		
5		4		
Goals and Measurable Target Conditions		5		
1		6		
2		On-Call Support		
3		Function / Title	Name	Email / Phone Number
4		1		
5		2		
Benefits to Customers & Business		3		
1		4		
2		5		
3		6		
4		7		
5		8		
Relevant Data		Approvals		
1		Executive Sponsor	Value Stream Champion	Facilitator
2				
3		Signature	Signature	Signature
4		Date	Date	Date



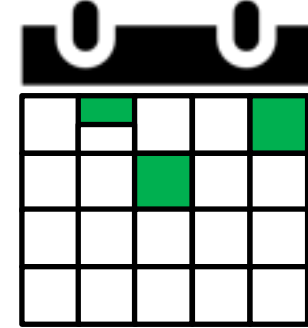
Schedule



Option 1:
3 full days
(consecutive)



Option 2:
3 full days
(non-consecutive)



Option 3:
Ad-hoc

- Ideally, three full, consecutive days
- Sometimes you just have to make it fit within schedules

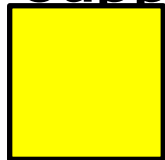


Location and Supplies

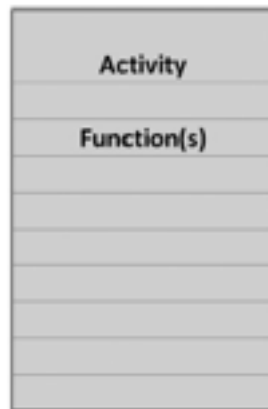
Location Requirements

- Boardroom located close to where the actual value stream work is done
- Whiteboard/wall to map value stream
- Preferably, do not have to setup/takedown between days

Key Supplies:



Post-it
notes



Large sticky
notes



Markers



Slides



Print-outs



Event Scope

- **Value Stream** - The sequence of activities to be improved
- **Specific Conditions** - What circumstances are included/excluded? (e.g., type of customer, geographic location, 80/20 rule)
- **Demand Rate** - How often does this need to be done?
- **Trigger** - What initiates the process?
- **First Step** - Task on the first process block
- **Last Step** - Task on the last process block
- **Boundaries and Limitations** - What is the team NOT authorized to change
- **Improvement Timeframe** - Typically 3-12 months



Leadership



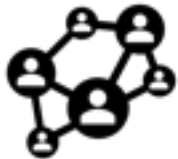
Executive Sponsor - Who can authorize decisions and make changes to the value stream?



Value Stream Champion - Who owns the value stream? Who will be accountable for its success?



Facilitator - Skilled, objective person leading the activity



Logistics Coordinator - Person to help organize meeting rooms, food, etc.



Mapping Team



Supervisors/Front-line Staff

- Understand the information and work flow



Organizational Leaders

- Have a vision for the future state



- Understand “the big picture”



- Can influence and authorize large future state improvements



On-Call Support



On-call support need to be immediately available so to not slow down the value stream mapping process.



Play a very minor role in the value stream



Provide indirect support to one or more areas in the value stream



Have detailed knowledge around specific processes



Briefings

What: Workshop participants share with their colleagues what was discovered/accomplished

Why:

- To share knowledge / spread organizational learning
- Build consensus
- Inform those that are unable to attend the full event

When: The last 30 minutes of each day

Who attends:

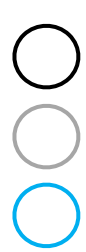
- Those who may need to sign-off on changes
- Those who would gain value from seeing process in action
- Those who need to support and align with change
- Those who need to be sold on the idea and process of value stream mapping



Data Collection

When do you collect data to populate the value stream map?

	Pros	Cons
Before	<ul style="list-style-type: none">• Helps determine key metrics for Charter• Decreases the time required during the workshop	<ul style="list-style-type: none">• May collect more data than required• May not collect all the right data
During	<ul style="list-style-type: none">• Helps gain consensus• Real-time information	<ul style="list-style-type: none">• May be time-consuming• May be difficult for a large group
After	<ul style="list-style-type: none">• Know exactly what data to collect	<ul style="list-style-type: none">• May be challenging to prioritize action items



Data Collection: HALIFAX TRANSIT



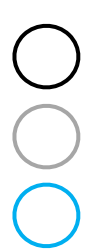
When: After VSM Workshop

Why:

- Had reasonable estimates entering the workshop
- Did not know the critical data elements to collect
- Wanted to establish stakeholder buy-in first

How:

- Created a data collection plan after workshop
- Visited front-line staff performing activities
 - We were also able to confirm pain points and barriers to flow as noted in the VSM Workshop



Data Collection:



When: During VSM Workshop

Why:

- We only had 5 days in Edmonton
- Wanted to understand the value stream first
- Needed data to complete the value stream and action plan

How:

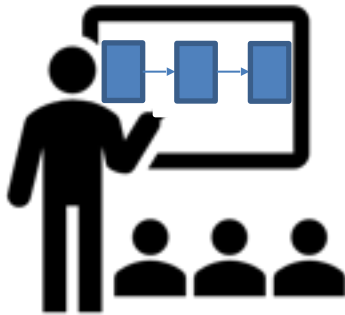
- First, determined activities in value stream
- Identified key resources and systems to collect data from
- Broke from VSM workshop, consulting team collected information while SMEs/Leadership got back to daily activities

 Regrouped the next day to finalize current state VSM

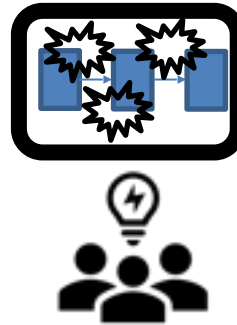


FACILITATION

Value Stream Mapping Workshop



Day 1



Day 2



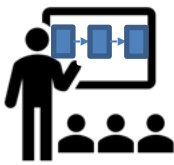
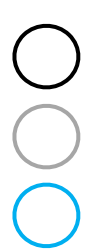
Day 3

Map Current State Design Future State

Create Action Plan



DAY 1: MAP CURRENT STATE



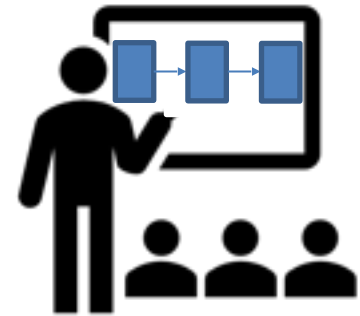
Day 1 Agenda: Current State



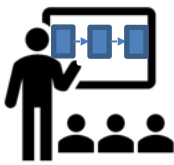
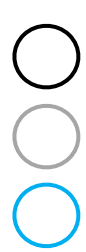
Kick-off event
Executive Sponsor,
overview, and
introductions



Value Stream Walk
I.E., Waste walk, “going
to the Gemba”



**Map the Current
State**
Create a current state
value stream map with the
mapping team



Value Stream Walk

Why??



**Organizational
Learning**



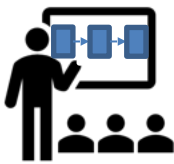
**Gain Consensus and
Grow Relationships**



Show Respect



CURRENT STATE VALUE STREAM MAPPING (OFFICE ENVIRONMENT)



Step 1: Title Block

Name the Value Stream: Remind participants of the scope of the value stream and specific conditions.

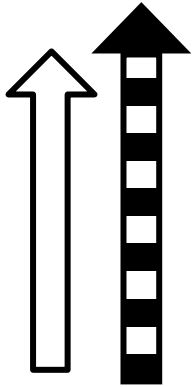
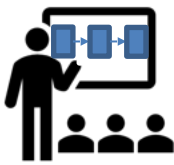
ABC Company Name
XYZ Value Stream
John Doe
January 1, 2017
Daily Demand: X units
Available Time: X minutes
Takt Time: X minutes

State the Daily Demand: How many 'things' need to be done in a specified period of time.

Calculate Available Time: How much time do you have to produce the 'thing'? Only include actual time work can be done. If everyone stops for lunch, remove it, if everyone attends a regular morning meeting, remove it.

Calculate Takt Time: The rate at which each thing must be produced: $\text{Available time} / \text{Daily Demand}$

Step 2: Customer/Supplier

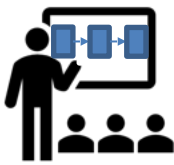


State the customer or client who is receiving the 'thing' produced. Put them right below the title box in the middle of the page if the customer is also the supplier.

Note with the appropriate icon if:

- The customer has a scheduled delivery
- The customer receives electronic information
- Production was triggered by someone other than the customer

Also note how the customer receive their goods (e.g., pushed with a shipment, shipped based on an order)

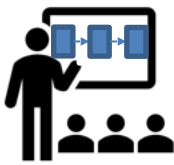


Step 3: Process Blocks

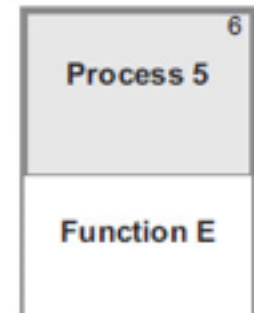
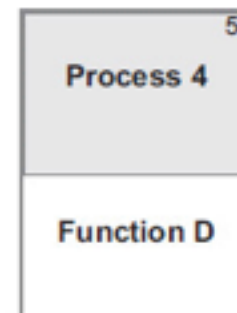
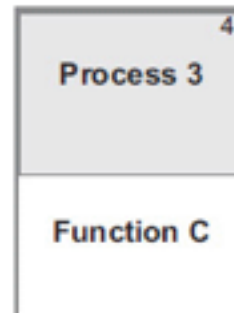
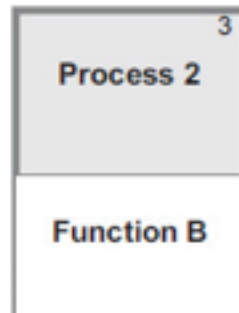
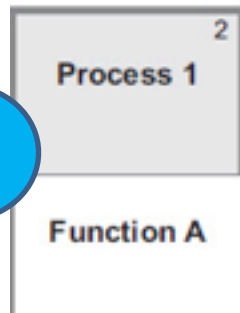
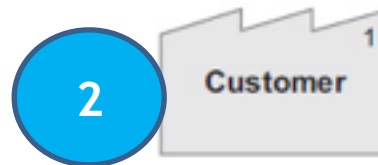
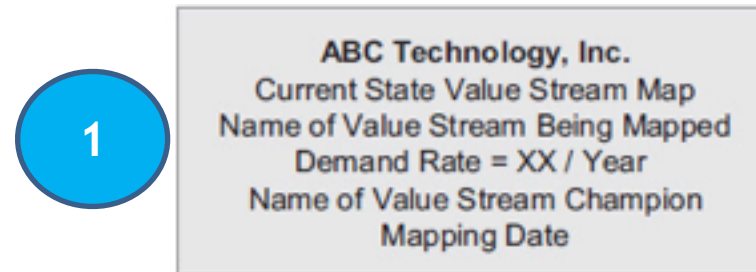
- 5 to 15 process blocks
- Generally, a new process block is warranted when the work stops flowing
 - Handoffs
 - Work-in-process buildup
 - Timed processing
- **Activity** - Verb-plus-noun format that describes the activity in the fewest amount of words
- **Function/Role** - Either the position(s) or department(s) that take part in the activity

Activity
Function(s)

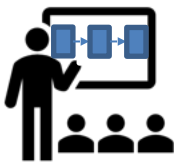
Negotiate contract
Sales, Legal, Finance



Office CSVSM - First Draft

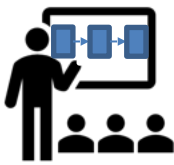


Step 4: Process Block Details



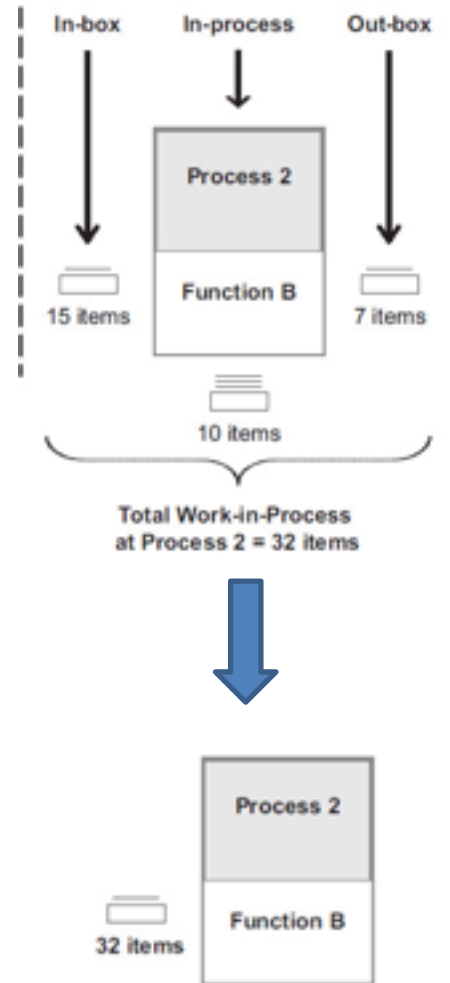
- ✓ Activity
- ✓ Role responsible
- ✓ # Resources in that role
- ✓ Measure of quality (%C&A)
- ✓ Lead time
- ✓ Hands-on processing time
- ✓ Pain Points (barriers to flow)

1 Provide List of Operators Eligible to Pick
Employee Services Supervisor ● 6 C&A = 95%
LT = 5 days
PT = 3 hours
Barriers to flow: <ul style="list-style-type: none">- data not centrally located- Operator list can change daily- multiple consultations required (significant peer review)- manual process (typos possible)- no documentation

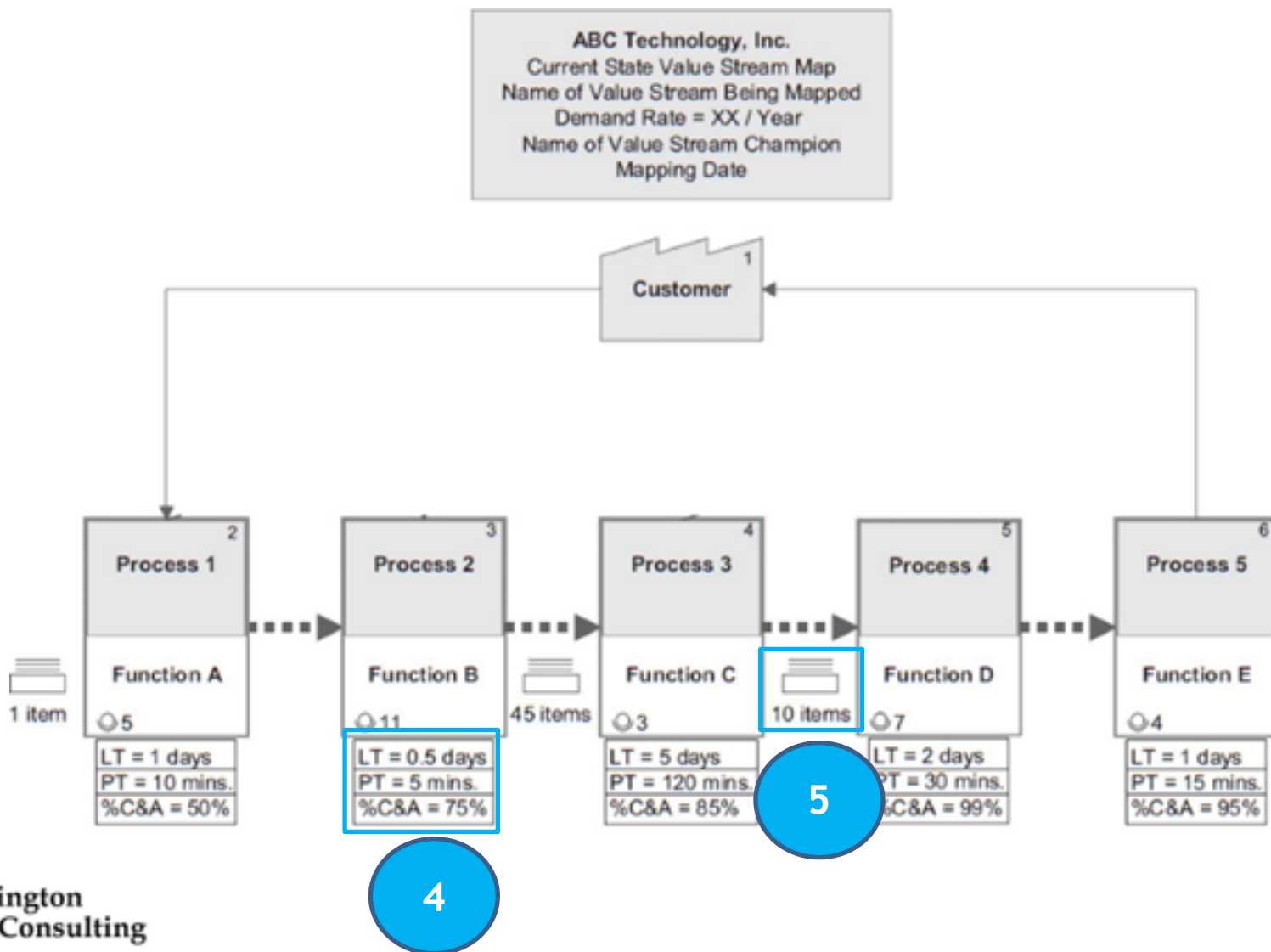
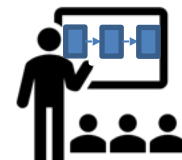


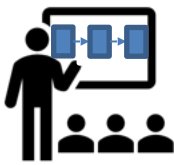
Step 5: Work In Process

- Determine the number of items in the inbox (completed in queue), in-process (have started the process but not yet completed), and in the outbox (completed but not yet in the next process)
- Why treat differently than manufacturing?
 - Easier to measure lead time than production rate
 - Max lead time may be more important than average lead time
 - Service processes often have more than one piece being worked on at any given time



Office CSVSM - Second Draft

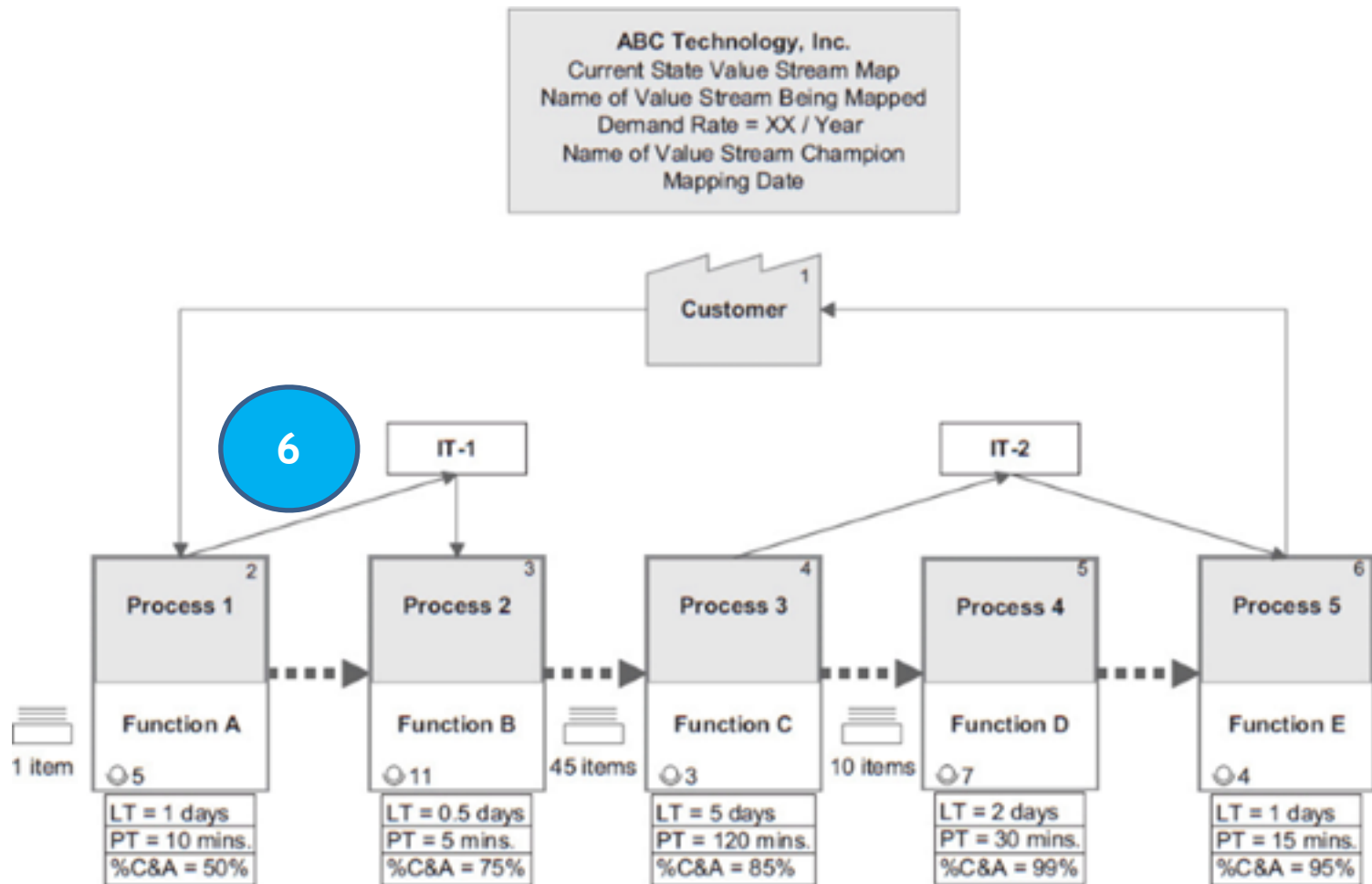
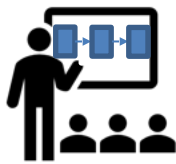




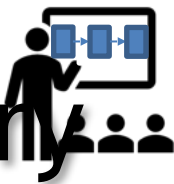
Step 6: Information Flow

- Identify the systems and applications that each process in the value stream interfaces with
 - Store data
 - Transmit data
 - Produce data (work output)
 - Generate reports
- Include applications such as Excel, Access, and SharePoint if they're being used to house data and drive decisions relevant to the value stream.
- Connect processes to IT systems and applications with arrows

Office CSVSM - Third Draft



Step 7: Timeline and Map Summary



- ○ Bring down lead time and processing time
 - If there are parallel paths, only bring down the times on the path that has the longest lead time
- Calculate total lead time
- Calculate total processing time
- Calculate activity ratio (be sure to convert times to the same units)
- **Calculate rolled %C&A (Multiply all %C&A together)**
- Calculate the number of FTEs

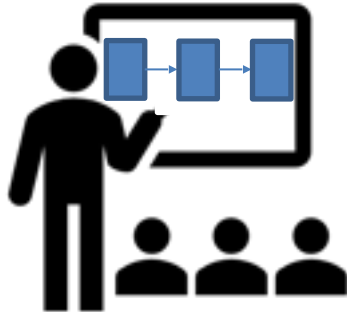
$$\frac{\text{Total process time per occurrence} * \text{\# of occurrences per year}}{\text{\# available work hours per employee per year}} = \text{\# FTEs}$$



DAY 2: DESIGN FUTURE STATE

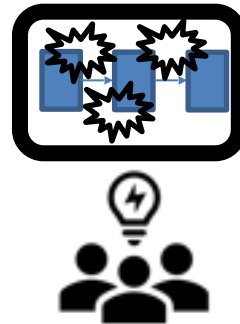


Day 2 Agenda: Future State



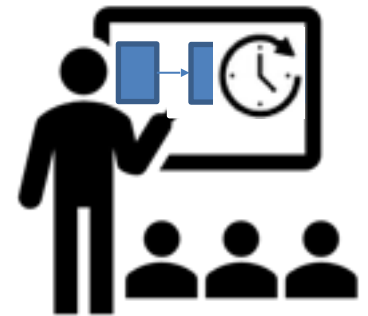
Review Current State

Value Stream Charter
and Map



Identify Kaizen Bursts

FSVSM Activities, Affinity
Diagram, Kaizen Bursts



Create Future State

What is the vision of the
value stream?



Key Notes



**Current State (day 1):
Fact-finding and Discovery**



**Future State (day 2):
Innovation and Creativity**

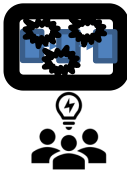
**There is no single “right” future state map!*



Activity 1: Determine the “Right Work”

- Effectiveness and Efficiency - delivering value as defined by the customer.
- Eliminating waste (TIMWOODS) throughout the value stream
- Focus on the macro prospective - IT systems, lead times, and handoffs/rework. *Processing time reduction is covered during the Kaizen Events*
- Goal is to reduce overall process time and lead time - adding processes and process steps may help this goal

**Write proposed countermeasures
(kaizen bursts) on your sticky
notes**



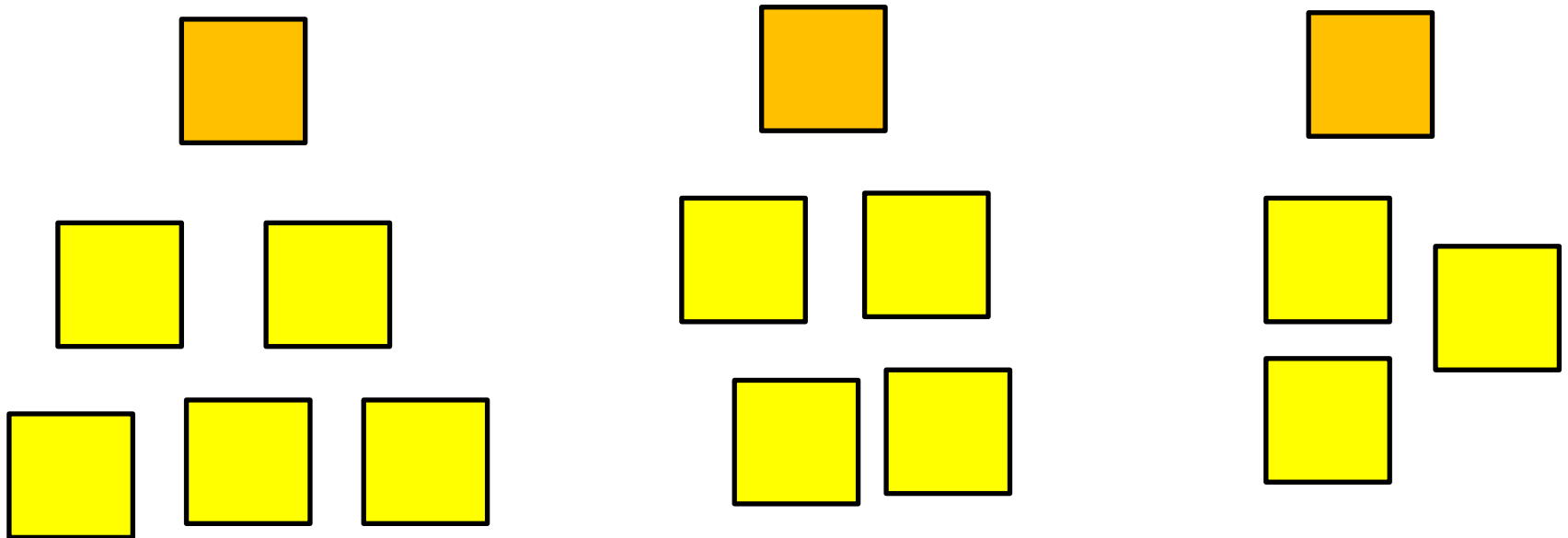
Activity 2: Make Work Flow

- Ideally, the “work item” passing through the value stream never stops. It moves effortlessly from with no hang-ups, hiccups, headaches, or delays.
- What is preventing the lead time from being the same as the process time for each and every process block?
- Look at reducing batching or batch sizes at a macro-level, if possible
- Some options:
 - Shifting consecutive processes to parallel activities
 - Combining tasks to reduce handoffs (cross-training, updating tasks)
 - Resequencing work (starting work earlier in the process or delaying the start of work)
 - Creating service-level and handoff agreements
 - Introducing standard work

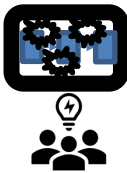
**Write proposed countermeasures
(kaizen bursts) on your sticky** ⁴⁴



Affinity Diagram



- As a team, group like-ideas and assign a category/header
- Discuss and make a final list of kaizen bursts



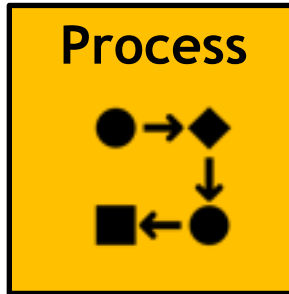
Typical Kaizen Bursts



Cross-train

Work
Balancing

Change in
Suppliers



Batch
Reductions

Visual
Manage-
ment

Error-proof

Standard
Work

Layout
Changes

5S

Process
Changes

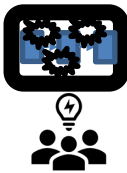


Capital
Investment

Auto-
mation

Technology
Upgrades

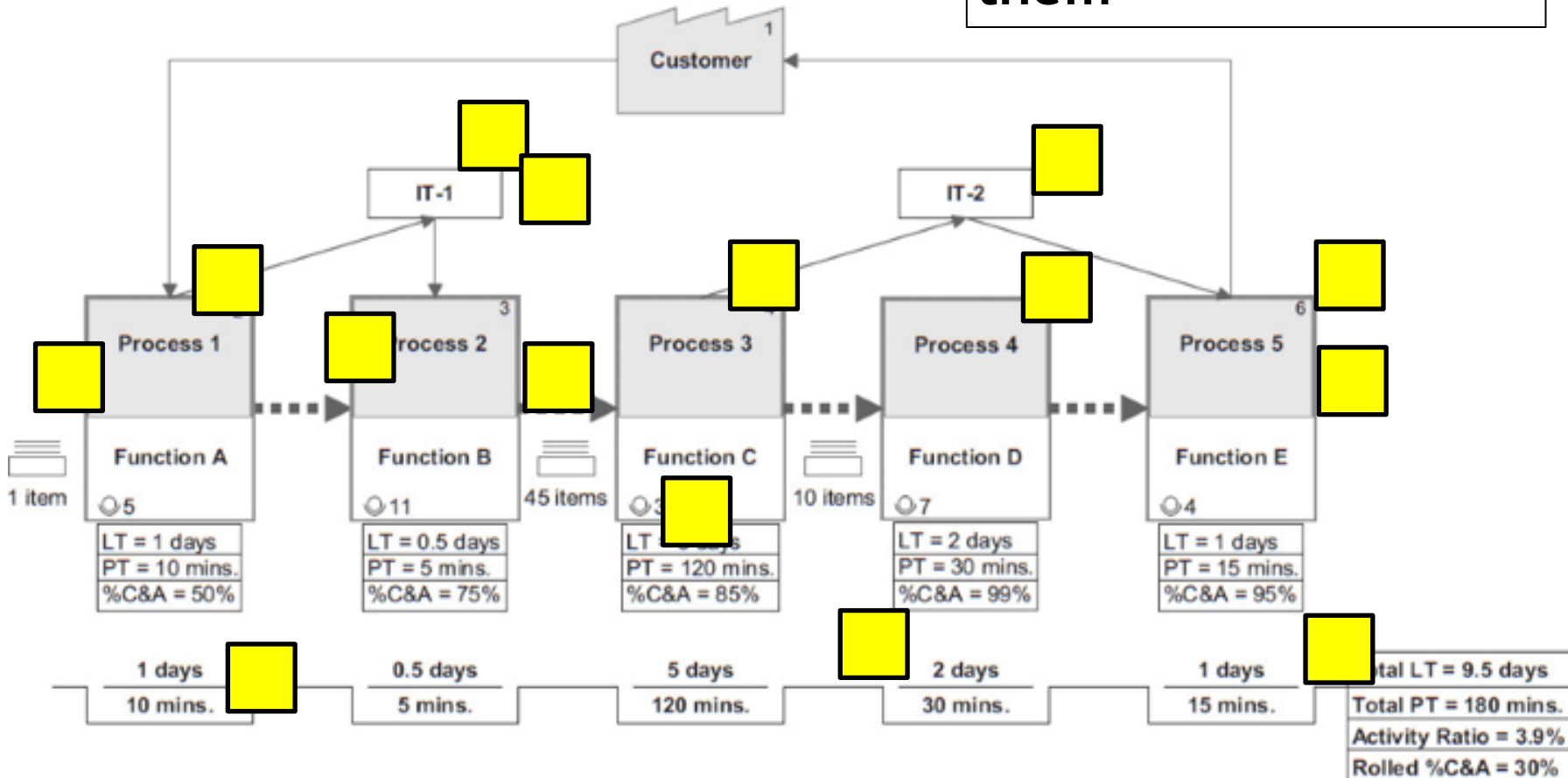
Material
Changes



Current State with Kaizen Bursts

ABC Technology, Inc.
Current State Value Stream Map
Name of Value Stream Being Mapped
Demand Rate = XX / Year
Name of Value Stream Champion
Mapping Date

Post kaizen bursts on map and number them

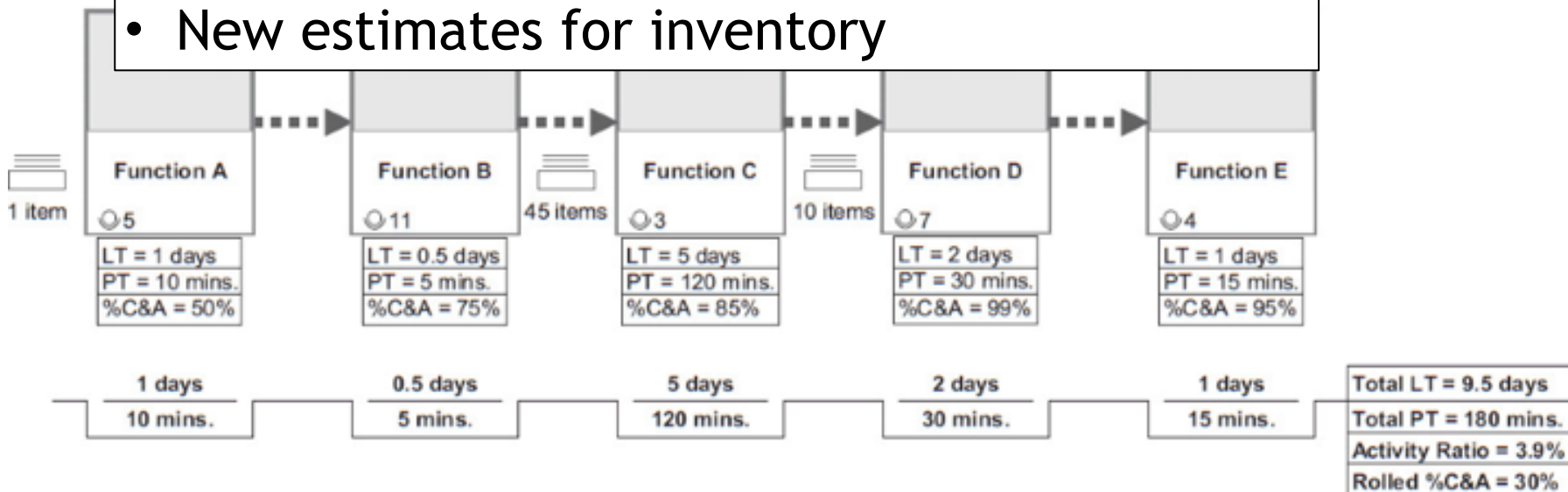




Future State Vision

ABC Technology, Inc.
Current State Value Stream Map
Name of Value Stream Being Mapped

- Changes in IT systems
- New activities
- Removed activities
- Redistribution of work
- Redistribution of staff
- New estimates for lead and processing times
- New estimates for inventory





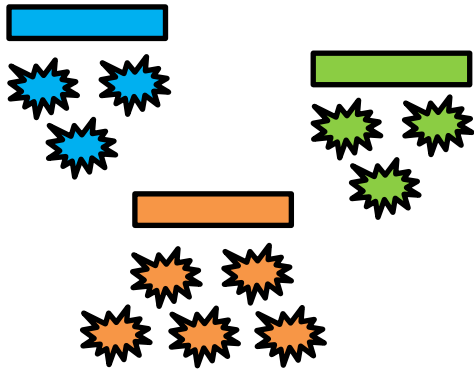
Value Stream Performance Metrics

Metric	Current State	Projected Future State	Projected % Improvement
Total Lead Time			
Total Process Time			
Activity Ratio			
Rolled % Complete and Accurate			
Process-specific (<i>e.g., number of meetings, number of emails, etc.</i>)			



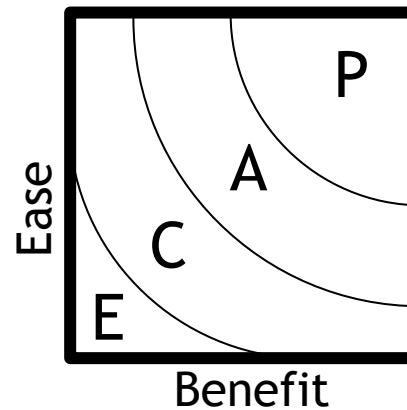
DAY 3: CREATE ACTION PLAN

Day 3 Agenda: Create Action Plan



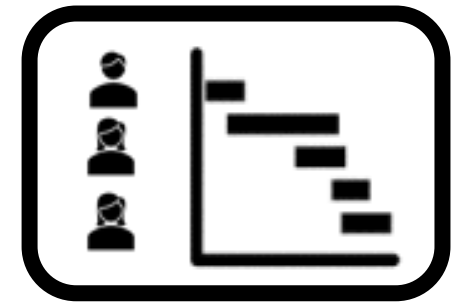
Group Activities

What's a "just-do-it" vs. Kaizen Event vs. Project



Prioritize Activities

Based on anticipated benefit and ease of implementation



Create Action Plan

Assign activities with deadlines to team members



Action Plan Keys to Success



1. A well-crafted plan



2. Consensus around that plan



3. The discipline to stick with it



4. The wisdom to know when to adjust the plan



5. The restraint to deviate from the plan only when absolutely necessary



Group Activities (by Execution Method)



Just-Do-Its (JDIs) - The low-hanging fruit that can be done in a day or less with low risk. Results should be evaluated then adjusted if necessary.



Kaizen Events (Rapid Improvement Workshops) - 2-5 day workshop to achieve rapid results, often for process flow redesign and development and implementation of standard work.



Projects - Complex improvements that do not fit the earlier two methods such as those that require extensive data analysis, capital investment, technology modifications. These often require a project manager.



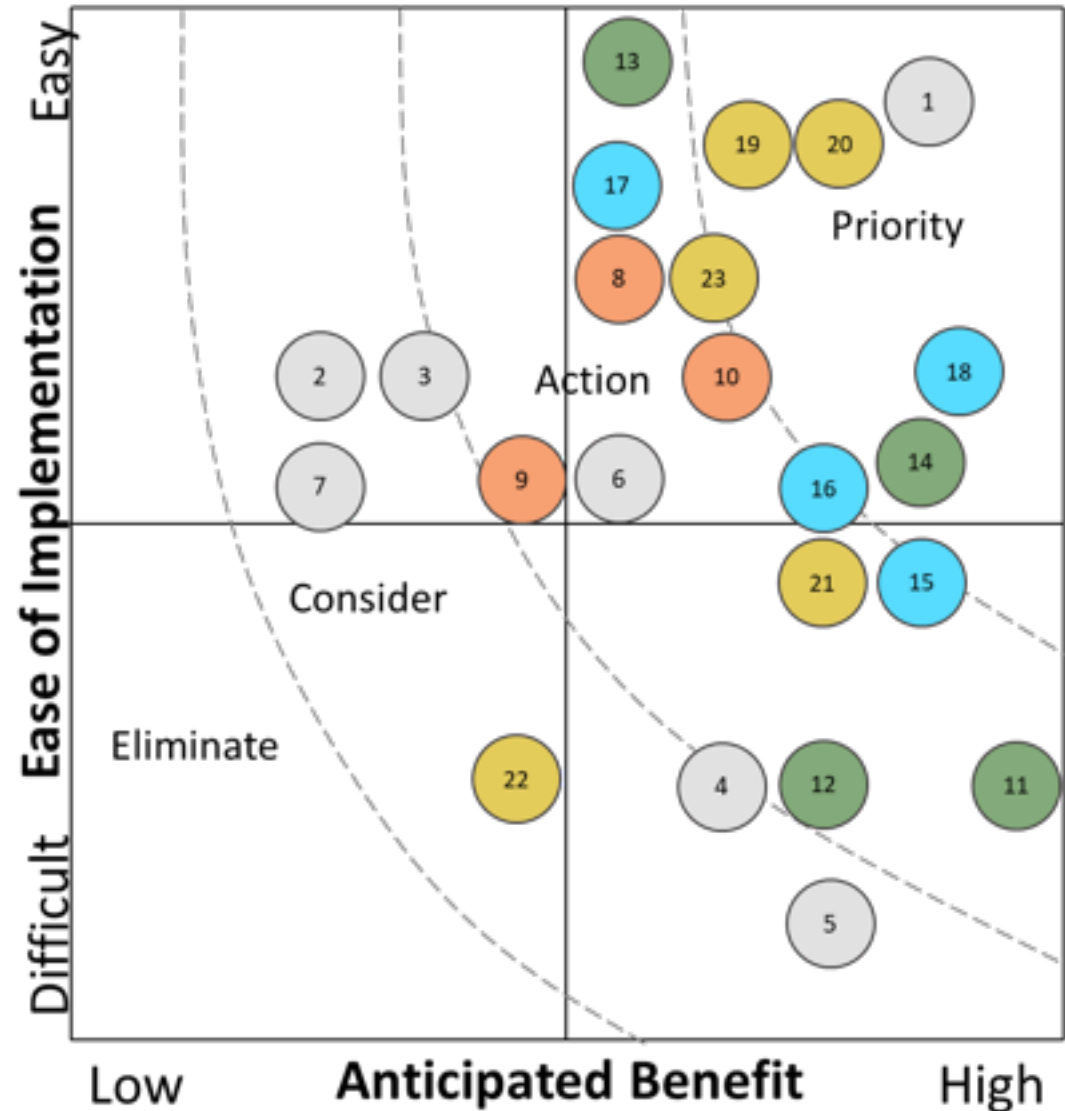
PACE Matrix

Ease of Implementation

- Time
- Effort
- Policy changes
- Technology
- Risks
- Change management

Anticipated Benefit

- Client satisfaction
- Employee satisfaction
- Cost reduction
- Increase in quality



Action Plan



FS VSM Block #	Measurable Target	Proposed Countermeasure	Exec. Method*	Owner	Planned Timeline for Execution												Status
					1	2	3	4	5	6	7	8	9	10	11	12	
2	Improve quality of referral to 85%	Implement standard work for referral process	KE	Sean Michaels													100%
3,4	Reduce lead time between scheduling and preregistration step to 45 minutes	Cross-train and co-locate work teams	Proj	Dianne Marie													75%
4	Only one check in per patient	Collect copays in imaging	KE	Ryan Austin													50%
4	Reduce wait time in waiting area by 50%	Balance work / level demand	KE	Dianne Marie													50%
6	Eliminate 6 hour lead time associated with transcription step	Implement voice recognition technology	Proj	Dave Gerald													50%
7	Eliminate redundant data entry	Auto populate between PACS and Meditech	Proj	Dave Gerald													25%
5	Visually managed inventory; no outages or expired items	5S CT supplies area; implement kanban	KE	Michael O'Shea													100%
6	Reduce imaging LT to one hour	Value-stream specific radiologists	Proj	Martha Allen													25%
8	Reduce report delivery LT to 30 minutes	Increase % of physicians receiving electronic delivery	Proj	Martha Allen													0%
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FSVSM Block Numbers - To correlate the intended shifts in metrics with the portion of the value stream improved.



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Measurable Target - The specific objective (i.e., predicted result) related to the corresponding countermeasure. Use process-specific target metrics when possible.



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Proposed Countermeasures - Improvements contained in the kaizen bursts (the “what”). A hypothesis that needs to be tested and evaluated (potential solution).



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Execution Method - Just-do-it, Kaizen Event, or Project?



Action Plan

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Owner - One person accountable for planning, implementing, and stabilizing. Often a value stream mapping team member.

Action Plan



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Planned Timeline - Simple Gantt chart to gain consensus

Action Plan



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Status - Updated during status meetings to see progress



Final Briefing

- **Buy-in from relevant leaders for the path forward**
- Candid discussions about the time and resources that will be necessary to properly execute the plan and potential obstacles/risks to success
- Huddle dates
- Celebration!





EXECUTION



Action Plan Keys to Success



1. A well-crafted plan



2. Consensus around that plan



3. The discipline to stick with it



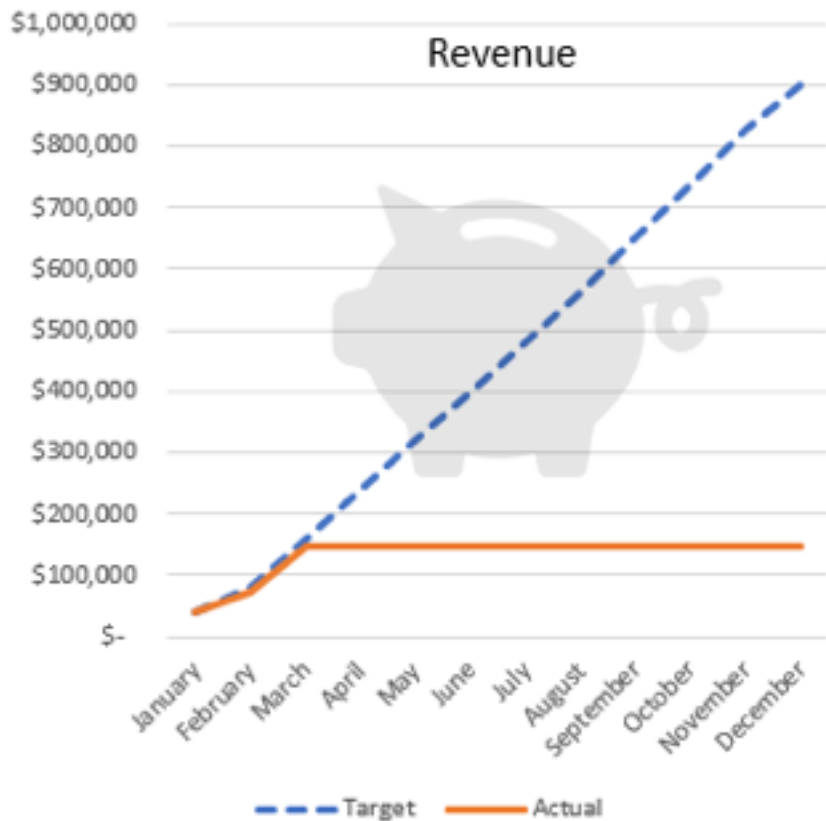
4. The wisdom to know when to adjust the plan



5. The restraint to deviate from the plan only when absolutely necessary



Keep a Compelling Scoreboard



Lead/Lag Measures

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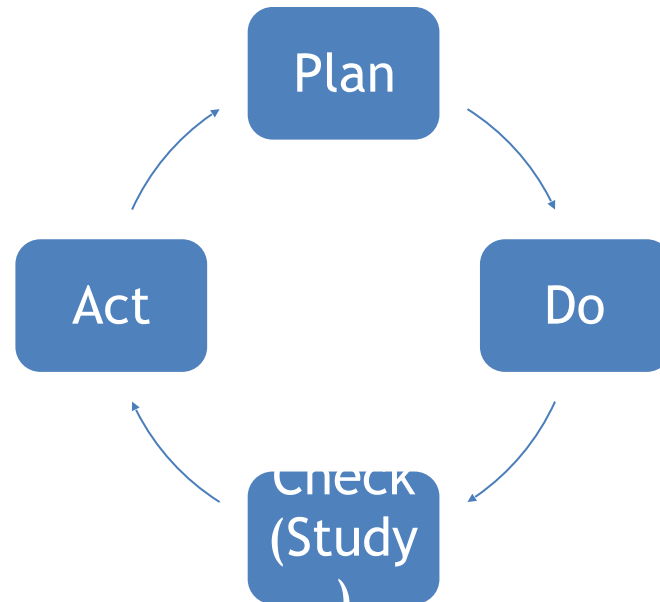
Action Tracker



Create a Cadence of Accountability

- **What/When:** (Bi-)Weekly Huddles
- **Where:** At the Gemba, if possible (opportunity to see the results of their work)
- **Who:** Executive sponsor, value stream champion, and owners of improvements

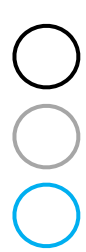
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References

- Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation - Karen Martin and Mike Osterling
- <https://tkmg.com/> (The Karen Martin Group)
- The 4 Disciplines of Execution: Achieving Your Wildly Important Goals - Chris McChesney, Jim Huling, and Sean Covey



Thank You!!!



Questions?