



BA20-Business Process Improvement

Credits: 14 PDUs / 2 Days

Course Level: Basic/Intermediate

Prerequisites:

No prerequisites - This course suitable for both novices and experienced people who need to manage and implement a Business Process Improvement (BPI) initiative. Having an understanding of project management and business processes is helpful and recommended.

Course Description:

This 2-day course aims at introducing its attendees to the core values, principles, and practices of Business Process Improvement.

Course Overview:

Many of today's Project Management and Business Analyst Professionals are finding themselves leading, managing and analyzing Business Process Improvement Initiatives - only to find that many of the tools and techniques applied no longer work as effectively or at all. In order to do more than survive, the Project Manager and Business Analyst must have a strong understanding of how to manage and implement BPI to effectively lead their teams and deliver on these initiatives.

The course will explore how you can easily and successfully make the transition to an effective Business Process Improvement environment.

Included:

- Full Student Guide and templates

Intended Audience:

It is appropriate for Managers, Executives, Project Managers, Business Analysts, Business and IT stakeholders working with analysts, Quality and process engineers, technicians, managers; supervisors, team leaders, and process operators.

Learning Objectives:

- Describe business process improvement (BPI) business drivers.
- Plan, manage and close requirements for a Business Process Improvement project
- Understand the essential elements of a successful BPI initiative.
- Identify candidate business processes for improvement.
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- Identify candidate business processes for improvement.
- Apply a methodology to business process improvement projects.

Section 1: Introduction -- A Business Process Improvement (BPI) Overview

- Why are we here today?
- What is BPI?
- Benefits of BPI
- Specific challenges/obstacles and successes
- Process improvement examples:
 - Industry specific examples
 - Famous debacles to avoid and successes to emulate
- Your role in helping to identify problems



Section 2: Overview of the Joiner 7-Step Method

- What is the Joiner 7-Step Method?
- Walkthrough of the Joiner 7-Step Method
- Template: Introduce and review Process Improvement Template
- **Case Study Exercise:** Read and discuss introduction to the Case Study

Section 3: Step #1 – Initiate Project

- Types of business problems typically encountered at insurance companies and banks
- How to recognize a business-related problem
- Identifying the gaps (delta between current and future states)
- Ownership of the project and the business problem
- Defining measurable success criteria
- **Case Study Exercise:** Complete the *Problem Statement* section (Step #1) of the template

Section 4: Step #2 – Define Current Situation

- What are symptoms of a problem?
- Looking for symptoms of the problem
- Performing Stakeholder Analysis
- Technique: View a RACI Matrix
- Defining the impacts caused by the problem
- Technique: Business Process Modeling (As-Is)
- Understand how to draw an As-Is Business Process Model
- **Case Study Exercise:** Complete the *Define Current Situation* section (Step #2) of the template

Section 5: Step #3 – Identify Root Causes

- What are root causes?
- Performing Root Cause Analysis
- Technique: Fishbone Diagram using the cafeteria example
- **Case Study Exercise:** Discuss a Fishbone Diagram
- Technique: Pareto Chart (discuss and show example)
- **Case Study Exercise:** Complete the *Identify Root Causes* section (Step #3) of the template

Section 6: Step #4 – Develop Solutions

- Identifying options for problem resolution
- Avoid jumping to conclusions
- Technique: Brainstorming
- **Case Study Exercise:** Conduct a Brainstorming Session
- Recognizing pros and cons for each option
- Technique: Kempner-Tregoe (“Must-Have” vs. “Nice-to-Have”)
- **Case Study Exercise:** Determine best solution using a “simple” Kempner-Tregoe model
- **Case Study Exercise:** Complete the *Develop Solutions* section (Step #4) of the template

Section 7: Step #5 – Define Measurable Results

- Prototyping the solution
- Technique: Business Process Modeling (To-Be)
- Measuring results against the success criteria (Step #1)
- **Case Study Exercise:** Review changes to an As-Is Business Process Model
- **Case Study Exercise:** Complete the *Define Measurable Results* section (Step #5) of the template



Section 8: Step #6 – Standardize Process

- Defining how the process will be documented
- Plan and understand organizational readiness
- Discuss how employees are empowered to identify and act upon their ideas
- Identifying follow-up needs (i.e., training) for the staff that will be impacted
- Technique: Communication Plan

Case Study Exercise: Complete the *Standardize Process* section (Step #6) of the template

Section 9: Step #7 – Determine Future Plans

- Monitoring the process for Continuous Process Improvement (The “Plan-Do-Check-Act” Cycle)
- Understand how to sustain the improvements made by the Joiner 7-Step Method
- Technique: PDCA form

Case Study Exercise: Complete the *Determine Future Plans* section (Step #7) of the template

Section 10: Going Forward with a Plan for Action

- Identifying process problems in your organization
Individual Exercise: Name three (3) possible areas for improvement
- Prioritize and define the next steps
Individual Exercise: Using a new template complete Step 2 & Step 3 for one possible area for improvement you have identified