

Introduction to Helix

An Enterprise Improvement Methodology

By

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Preface - The Quest

Develop a Method to Help People and Organizations to

- ❑ Discover and define opportunities for improvement
- ❑ Gain consensus and support for changes needed to achieve improvement
- ❑ Increase empathy and teamwork between cross functional work groups
- ❑ Build criteria for knowing how and when improvements will be realized
- ❑ Develop a framework for renewal for future improvements
- ❑ Enhance innovations related to achieving strategic initiatives
- ❑ To improve the way organizations and people think about and do business

Preface – Evolution

- ❑ 1979 - Started as an SDLC Methodology
- ❑ Mid 1980's Added
 - Process Analysis
 - Discovery Functions
- ❑ 1990's Added
 - Alignment Analysis
- ❑ 2000's Added
 - Organizational Development Components
 - Governance and Maturity Assessment

Present Day

- ❑ 30 Years of Research, Field Proven Experience and Refinement
- ❑ 2 Books Published and Distributed in over 15 Countries
- ❑ Lean Six Sigma Friendly

Adaptable and Scalable

Deployable

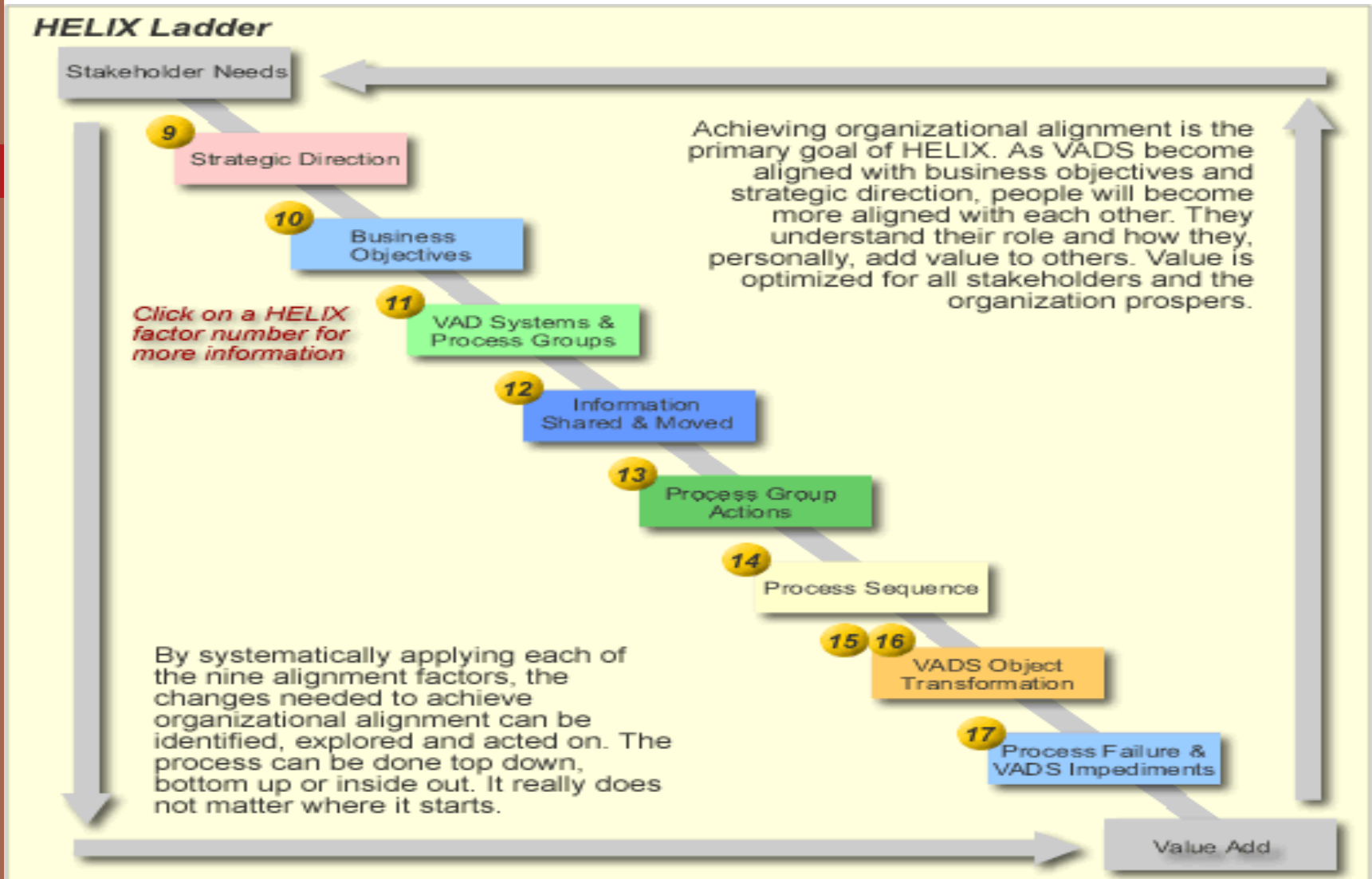
- Enterprise Wide
or
- Single Project

Amazingly
FAST!!!!!!

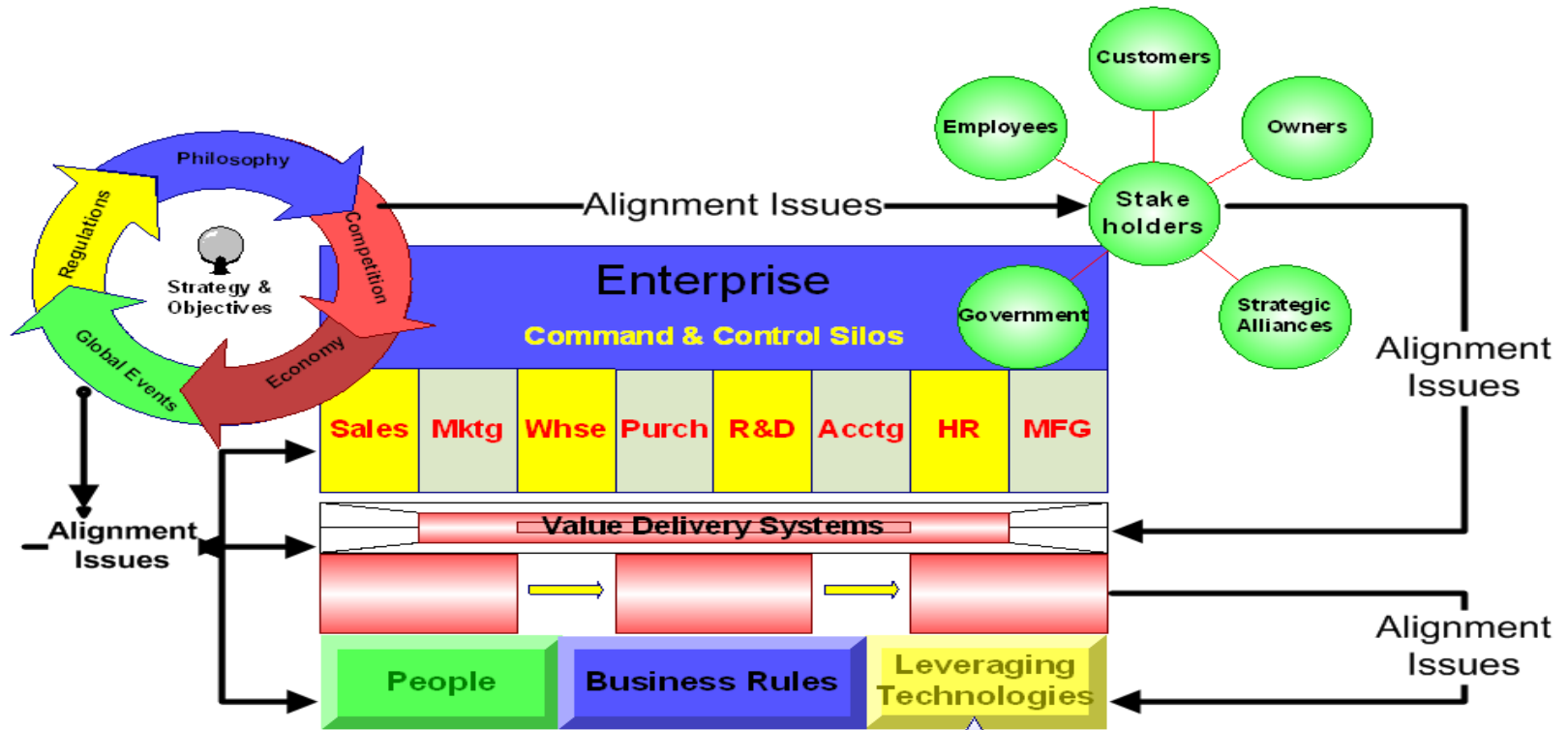
Used As

- Prescriptive Method (using proven process & templates)
or
- Flexible Framework (adapt to fit)

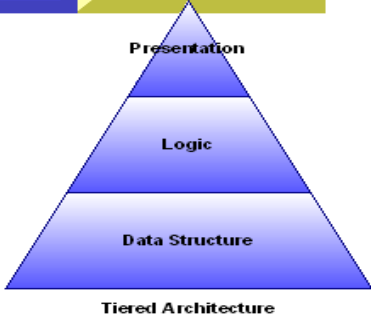
The Helix Methodology



The Helix Methodology



**Goal of BPI
= Alignment**



The Helix Methodology

Overview of Process Improvement Discovery Phases

Phases C - D Repeat for Each Value Delivery System					
Phase A	Phase B	Phase C	Phase D	Phase E	Phase F
Executive Briefing	Kick-off	1st Facilitation Work Session	1st Diagnostic Work Session	Subsequent Facilitation Session	Subsequent Diagnostic Session
<ol style="list-style-type: none"> 1. Stakeholder needs and objectives 2. Review business plan 3. Questions for executives 4. Team consensus and understanding 5. Present project proposal 	<ol style="list-style-type: none"> 1. Identify team and VADS participants 2. Select team and VADS participants 3. Kick-off meeting 4. Confirm team's and participant's understanding of needs, strategic direction, and project goals 	<ol style="list-style-type: none"> 1. Review objectives and goal of session 2. Facilitate a Change Analysis (CA) 3. Facilitate existing level 1 workflow 4. Facilitate existing level 2 workflow 5. Map the CA current situations to EWFL2 6. Facilitate proposed level 2 workflow 7. Map project and CA preliminary goals to PWFL2 	<ol style="list-style-type: none"> 1. Summarize knowledge gained 2. Formalize CA, WFL1, EWFL2, PWFL2 3. Tests on CA, WFL1, EWFL2, PWFL2 4. Complete alignment diagnostics 5. Failure analysis & refine PWFL2 6. Prepare follow up questions for next facilitation workshop 	<ol style="list-style-type: none"> 1. Review models, issues, questions 2. Update models 3. Conduct final walkthroughs 4. Consensus on CA goals and PWFL2 5. Outline action steps for implementation 	<ol style="list-style-type: none"> 1. Finalize improvement recommendations 2. Finalize working papers 3. VADS level implementation plan 4. VADS level cost estimates 5. Present findings to management
<u>10 hours</u>	<u>4 hours</u>	<u>25 to 40 hours</u>	<u>16 hours</u>	<u>50 to 90 hours</u>	<u>48 hours</u>

The Helix Methodology

The Helix Factors – The Principle Factors

- ❑ **Factor #1 - The Principle of Making a Difference**
- ❑ **Factor #2 - The Principle of Value-added Delivery Systems**
- ❑ **Factor #3 - The Principle of Discovery**
- ❑ **Factor #4 - The Principle of Collaboration**
- ❑ **Factor #5 - The Principle of Context**
- ❑ **Factor #6 - The Principle of Conditioning for Change**
- ❑ **Factor #7 - The Principle of Catharsis and Revelation**
- ❑ **Factor #8 - The Principle of Focused Urgency and Momentum**

The Helix Methodology

The Helix Factors – The Alignment Factors

- Factor 9** -- Alignment of Stakeholder Needs to Strategic Direction
- Factor 10** -- Alignment of Strategic Direction to Business Objectives
- Factor 11** -- Alignment of Business Objectives to Value-added Delivery Systems and Process Groups
- Factor 12** -- Alignment of Value-added Delivery Systems & Process Groups to the Information Being Shared & Moved
- Factor 13** -- Alignment of Information Being Shared to Stimulus Triggers & Process Group Actions
- Factor 14** -- Alignment of Process Group Actions to Process Sequence
- Factor 15** -- Alignment of Process Sequence to VADS' Object Transformations
- Factor 16** -- Alignment of VADS Object Transformations to the Value-added
- Factor 17** -- Alignment of VADS Object Transformation to Process Failures & VADS Impediments

Measurable Results Using Helix

- ❑ Increased Value Delivered to Stakeholders
- ❑ Reduced Delivery System Fragmentation
- ❑ Increased Productivity, Efficiency & Profitability
- ❑ Reduced / Eliminated Non-Cost Effective Controls
- ❑ Increased Customer Service
- ❑ Reduced Steps to Complete Delivery System Goals
- ❑ Increased Employee Buy-in and Satisfaction
- ❑ Reduced Errors, Failures & Defects