WorkOut Overview

Overview

One-day Problem Solving
What is WorkOut

A disciplined problem solving approach that in one day (sometimes less), ensures:

- Issues are analyzed
- Causes are identified
- Recommendations are created
- Action plans of 60 days or less are developed
- Manager approval is obtained
Why use it

Fast Solutions

• Solve it in a day and sometimes less
• Identify low- or no-cost solutions

Fast Results

• Identify all kinds of quick wins:
  ✓ Unleash cost saving ideas
  ✓ Improve customer service
  ✓ Eliminate unnecessary work
When to use WorkOut

Use When:
- The issue is not complex
- Little data is needed
- Process knowledge is not documented
- A quick-hit, immediate solution is feasible. The solution can be implemented within 30-60 days
- The issue can be addressed in a day or less (can be extended to 2 days if many participants are needed or operational requirements require splitting the session)
- The solution is low cost and requires few resources

Do Not Use When:
- Participants have no control over or passion for the issue.
- The problem involves complex/technical issues
- Complex analysis, rigorous problem-solving required, or long-term data collection is needed
- Extensive documentation is needed to deploy solutions
Keys to Success

- Under control of the team
- Focus on local problems encountered in daily operations
- Focus on a tightly-defined issue
- Led by trained/certified facilitators
- Solutions the team can implement in 30 to 60 days
- Participants are passionate about the topic
How it Works

Seven-Step Process with Planning, Follow Through...

**Prepare**
- Introduce
- Brainstorm
- Brainstorm Solutions
- Plan
- Present
- Deploy

**Pre Event**
- Work with sponsor to confirm topic
- Identify the participants and roles
- Logistics

**WorkOut Event**
- Sponsor kick-off
- Brainstorming issues and solutions
- Prioritizing solutions
- Action Planning
- Sponsor Approval
- Identify next steps

**Post Event**
- Implement Action Plan
- Follow-up meeting with Sponsor
- Celebrate & communicate success!

...and Clearly Defined Roles & Responsibilities
Topic Selection

Try a topic like . . .

- Eliminate unnecessary work and expense in the recruitment process
- Decrease costs of vendor management
- Increase customer satisfaction in the warranty process
- Improve efficiencies in Operations accounting process

Avoid a topic like . . .

- Identify, source, and plan implementation of new HR system (complex, long-term, technical solution; centers around planning, rather than eliminating work)
- Choose vendor short list from RFP responses (does not eliminate redundancy, take cost out, etc.)
- Analyze customer satisfaction survey results (requires data, rather than group knowledge and experience; not action-oriented)
- Resolve conflict between Finance and Operations (does not empower employees or remove work)
Problem Statement:

Measures:

Scope Diagram (as appropriate:

Current Understanding:  Out-of-Scope:
Key Tools Used in Event

- Brainstorming
- Affinity Diagrams
- Interrelationship Diagraph

- Brainstorming
- Payoff matrix (impact vs. effort)
- Multi-vote

- Use template to complete Action plans.
- Plans completed as a whole group or in subgroups depending on time and group desires

- Present to sponsor using the completed template

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Roles and Responsibilities

Facilitators

- Prepare & coach Sponsor
- Guide topic, scope, and event planning
- Prepare and facilitate event
- Document results
- Track progress with action teams, every 2 weeks
- Report outcomes

Participants

- Articulate issues/problems
- Develop and present recommendations:
  a) Recommendation
  b) Action plan
  c) Timeline/due dates
- Assign Recommendation Owner from within Team for each recommendation
- Implement recommendations. Get help when needed

Sponsor

- Define & select topic, expectations, in/out boundaries, constraints, success indicators, and desired outcomes/measures
- Select & notify attendees
- Present business context and problem at beginning of event
- Decide on recommendations on the spot. Maintain a “bias to approve”, but negotiate areas of question
- During deployment, remove barriers, provide support, accountability

Recommendation Owners

- One WorkOut team member assigned to each recommendation
- Provide light project mgmt and follow-up
- Participate in follow-up meetings with Facilitators
Measures and WorkOut

What and Why Measure?

• Measures give you concrete data that says you’re making progress and that the approach is meeting expectations
• Validates employees’ work and motivates them to make further improvements
• Measures provide data that demonstrate the company’s progress toward its goals

If it’s important enough for staff to spend a whole day resolving, it’s probably important enough to measure.
Barriers to Success

- Inadequate preparation of the Sponsor
- Insufficient rigor in selecting the issue/topic
- Right people are not in the room
- Too many recommendations to implement
- Action items vague
- No follow-up on recommendations
- Little to no support from upper management for implementation
- Sponsor doesn’t truly support the recommendations (“Bias to approve,” doesn’t mean accepting everything)

Set the Team Up for Success!
Contact

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