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
The Helix Methodology

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
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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

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

Amazingly FAST!!!!!
The Helix Methodology

Achieving organizational alignment is the primary goal of HELIX. As VADS become aligned with business objectsives and strategic direction, people will become more aligned with each other. They understand their role and how they, personally, add value to others. Value is optimized for all stakeholders and the organization prospers.

By systematically applying each of the nine alignment factors, the changes needed to achieve organizational alignment can be identified, explored and acted on. The process can be done top down, bottom up or inside out. It really does not matter where it starts.
The Helix Methodology

Goal of BPI = Alignment
The Helix Methodology
Overview of Process Improvement
Discovery Phases

### HELIX Project Summary

<table>
<thead>
<tr>
<th>Phase A</th>
<th>Phase B</th>
<th>Phase C</th>
<th>Phase D</th>
<th>Phase E</th>
<th>Phase F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Briefing</td>
<td>Kick-off</td>
<td>1st Facilitation Work Session</td>
<td>1st Diagnostic Work Session</td>
<td>Subsequent Facilitation Session</td>
<td>Subsequent Diagnostic Session</td>
</tr>
<tr>
<td>1. Stakeholder needs and objectives</td>
<td>1. Identify team and VADS participants</td>
<td>1. Review objectives and goal of session</td>
<td>1. Summarize knowledge gained</td>
<td>1. Review models, issues, questions</td>
<td>1. Finalize improvement recommendations</td>
</tr>
<tr>
<td>2. Review business plan</td>
<td>2. Select team and VADS participants</td>
<td>2. Facilitate a Change Analysis (CA)</td>
<td>2. Formalize CA, WFL1, EWFL2, PWFL2</td>
<td>2. Update models</td>
<td>2. Finalize working papers</td>
</tr>
<tr>
<td>5. Present project proposal</td>
<td></td>
<td>5. Map the CA current situations to EWFL2</td>
<td>5. Failure analysis &amp; refine PWFL2</td>
<td></td>
<td>5. Present findings to management</td>
</tr>
<tr>
<td>10 hours</td>
<td>4 hours</td>
<td>25 to 40 hours</td>
<td>16 hours</td>
<td>50 to 90 hours</td>
<td>48 hours</td>
</tr>
</tbody>
</table>

Phases C - D
Repeat for Each Value Delivery System
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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
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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
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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