BA20-Business Process Improvement

Course ID: **BA20**
Credits: **14 PDUs**
Course Duration: 2 days (Live in person class only)
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.
- Understand the essential elements of a successful BPI initiative.
- Identify candidate business processes for improvement.
- Apply a methodology to business process improvement projects.

Section 1: <u>Introduction – Business Process Improvement (BPI) Overview</u>

- Why are we here?
- What is BPI?
- BPI as a driving innovator in organizations
- Benefits of BPI
- Challenges/obstacles & successes
- Uncovering BPI challenges
  - o Analyzing your personal BPI skills
  - o Assessing BPI in your organization
- Process improvement examples
  - o Famous debacles to avoid and successes to emulate
- Your role in helping to identify problems

Section 2: <u>Overview of the Joiner 7-Step Method</u>

- What is it?
- Walkthrough of the seven step process
- <u>Template:</u> Introduce and review the Process Improvement Template
- **<u>Case Study Exercise:</u>** Discuss and determine a group case study that BPI can be applied

Section 3: <u>Step #1 – Initiating the Project</u>

- Types of business problems typically encountered
- 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 the measurable success criteria
  - o Key Performance Indicators
- **<u>Case Study Exercise:</u>** Fill-out the Problem Statement section (Step #1) in the template

Section 4: <u>Step #2 – Defining the Current Situation</u>

- What are symptoms of a problem?
- Looking for symptoms of the problem
  - o Recognizing the causes of poor process performance
- Performing stakeholder analysis
  - o Understanding your stakeholder needs
- <u>Technique:</u> View a RACI Matrix
- Defining the impacts caused by the problem
- <u>Technique:</u> Business Process Modeling (As-Is)
  - o Determine how using the Business Process Management Notation (BPMN) can help
  - o Key elements of BPMN
  - o How to conduct a BPMN workshop
- Understand how to draw an As-Is Business Process Model
- **<u>Case Study Exercise:</u>** Fill out the Current Situation section (Step #2) in the template

Section 5: <u>Step #3 - Identification of the Root Cause(s)</u>

- 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:** Fill out the Cause Analysis section (Step #3) in the template

Section 6: Step #4 - Development of Potential 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
- **Case Study Exercise:** Fill out the Solutions section (Step #4) in the template

Section 7: Step #5 – Defining the Results

- Prototyping the solution
- Technique: Business Process Modeling (To-be)
- Measuring the results against the success criteria (Step #1)
- **Case Study Exercise:** Review changes to an As-is Business Process Model
- **Case Study Exercise:** Fill out the Results section (Step #5) in the template

Section 8: Step #6 – Standardizing the Process

- Defining the how the process will be documented
- Plan and understand organizational readiness
- Discuss how stakeholders can be empowered to identify and act upon their ideas
- Identifying follow-up needs (i.e., training) for the people impacted
- Technique: Communication Plan
- **Case Study Exercise:** Fill out the Standardization section (Step #6) of the template

Section 9: Step #7 – Future Plans

- Monitoring the process for continuous process improvement (Plan-Do-Check-Act Cycle)
- Understand how to sustain the improvements made by the Joiner 7-step method
- Technique: PDCA form
- **Case Study Exercise:** Fill out the 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:** Fill-out the Problem Statement section (Step #1) in the template