Business Process Improvement (BPI) Joiner 7-Step Method – Quick Reference Card

Step 1 Initiate Project	Step 2 Define Current Situation	Step 3 Identify Root Causes	Step 4 Develop Solutions	Step 5 Define Measurable Results	Step 6 Standardize Process	Step 7 Determine Future Plans
Goal: To define the **Project's purpose and scope**	**Goal:** To further focus the improvement effort by gathering data on the current situation.	**Goal:** To identify and verify deep causes with data: To pave the way for effective solutions.	**Goal:** To develop, try out, and implement solutions that address root causes.	**Goal:** To evaluate both the solutions and the plans used to implement them.	**Goal:** To maintain the gains achieved by standardizing work methods or products.	**Goal:** To anticipate future improvements and preserve the lessons from this effort
Questions: **What is the project's purpose?** What is the problem / opportunity of this initiative? Why are we doing it this way today? What are the impacts/benefits to other departments and or stakeholders? How will know if things get better? (What are the results the results you are trying to achieve?) What is your plan for this project?	**Questions:** **What is the history of the problem?** Can the problem be described in a sketch or flowchart? What occurs when the problem appears? What are the symptoms? Where and when do symptoms appear? How often does this problem occur? What are the "current" baseline metrics being observed? Who is and who is not involved? What is working in the current step & needs improvement moving forward?	**Questions:** **What were the possible causes of the symptoms described in step 2?** Which of those symptoms are verified by data? Are there deeper causes (of the verified causes?) How does verifying the causes affect decisions about who should be working on this effort? What is working in the current step & needs improvement moving forward?	**Questions:** **What solutions were considered that addressed the causes verified in step 3?** What "criteria" was useful for comparing potential solutions? What are the pros and cons of each solution? Which solution seems best? How will you try them on a small scale? What data will you collect? Are there problems for implementing it full scale? What is working in the current step & needs improvement moving forward?	**Questions:** **How well did the results meet the targets for this project?** How well was the plan executed? What challenges did you face? What worked and what would you do differently? What is working in the current step & needs improvement moving forward? **NOTE:** Did you meet your expected baseline metrics?	**Questions:** **(In the future), what new standard method or product will be put in place?** How will you train employees? What's shall be put in place to ensure that the gains are maintained? (To prevent backsliding) What will we monitor regularly to ensure the change process is still working properly and effective? Have you established a date/timeline for conducting BPI lessons learned? (In the future), once the solution has been implemented, what is working and what needs to be improved?* (PDCA cycle)	**Questions:** **What remaining needs were not addressed by this project?** What are your recommendations for investigating these remaining needs? What did you learn from this project? How can these lessons learned be communicated? How will the documentation be completed? What happens to it when it's finished? How will this project be brought to a close? How will you celebrate?

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