Elements of a Successful Process Rollout

**Planning**

- Define objectives and mission statement
- Identify champions and sponsors
- Identify potential business gains when rolled out
- Develop implementation and training strategy
  - Pilot or all users
- Conduct Process Rollout Risk Assessment
  - Event: What could happen?
  - Probability: How likely is it to happen?
  - Impact: How bad will it be if it happens?
  - Mitigation: How the Probability will be reduced? How much?
  - Contingency: How the Impact will be reduced? How much?
  - Reduction: Mitigation X Contingency
  - Exposure: Risk – Reduction
  - Underway: How can the roll out be stopped?
- Develop a change management plan
- Determine and secure a budget
- Process discontinuation impact (i.e., conversion plan)
- Process maintenance
  - Who will be responsible to accomplish/monitor
  - What/when/how will maintenance be carried out
- Identify Departments or User Community to be trained
  - Inform department heads of the training initiative
- Perform User Skill Assessment
  - New Hires
  - Existing workforce
    - Create a list of training recipients by department
    - Send skill assessment forms to department heads
    - Collect results by department
  - Compile User Skill Assessment results
    - Present results to training coordinator
    - Provide feedback to department heads
- End project initiation
Elements of a Successful Process Rollout

❖ **Commencement**

- **Prepare Rollout Schedule**
  - Create a user training placement matrix
  - Prioritize training delivery according to need
  - Determine course dates, start and end times, and locations
  - Post course outlines and schedule on corporate intranet
  - Establish support through help desk for post-training questions

- **Develop a Marketing Strategy (communication plan)**
  - Order promotional material
  - Create posters and place them in high-traffic areas
  - E-mail registration invitation to participants
  - Arrange for catering of meals and refreshments

- **Training Registration**
  - Enroll users who registered
  - Send out confirmations to those registered w/prework requirements
  - Monitor cancellations and late requests for training

- **Schedule Instructors**
  - In-house instructors
  - Outsourced instructors

- **Reserve Training Rooms**
  - Coordinate optimal workstation and equipment setup
  - Ensure workstation and equipment performance

- **Develop training materials necessary for content delivery**
  - Create process/work flow charts
  - Create Work Instructions
  - Record and publish UPK training topics
  - Order or assemble training manuals and handbooks

- **Training Evaluation (online or paper)**
  - Course evaluation form
  - Instructor evaluation form

- **End commencement**

❖ **Implementation and Control**

- **Policy implementation**
  - Management of every day operations
    - Overview of performance,
Elements of a Successful Process Rollout

- Instituting a system for feedback,
- Monitoring,
- Evaluation,
- Reporting
  - Management of resources – related to execution
    - Administrative support system
    - Finance,
    - Supplies,
    - Personnel

➢ Conduct training and track attendance
  - Daily conference call with Trainers
    - Address training delivery issues
    - Collect feedback and compile results
    - Determine need for make up training
  - Provide department heads training results feedback
  - Issue certificates of completion to participants

➢ On the Job training (information, expectations, tools and methods)
  - Work process flow
  - Poke Yoke use
  - Process visual que’s
  - Special tool instruction
  - Checklist, forms and spreadsheets
  - Process metrics and monitoring
  - Problem solving tools and techniques

➢ Process auditing (information, expectations, tools and methods)
  - Work process flow
  - Poke Yoke use
  - Process visual que’s
  - Special tool instruction
  - Checklist, forms and spreadsheets
  - Process metrics and monitoring
  - Problem solving tools and techniques

➢ End implementation and control

❖ Close Out and Conclusion

➢ Performance measurement
  - Post- review
    - Process issues
    - Process improvements
Elements of a Successful Process Rollout

- Process achievements
- Training content
- Course evaluations
- Training delivery
- Instructor evaluations

➢ **FAQ for future rollout endeavors**
  - Create a list of best practices
  - Identify activities that produced results and improvements
  - Identify activities that did not produce intended results or improvement
  - Identify issues that were problematic
  - Identify how to avoid or mitigate problematic issues to lessen impact
  - Create a list of improvements that will be applied to future rollouts

➢ **Conduct Return on Investment (ROI) Research**
  - Send ROI forms to participants and department heads
  - Measure ROI according to established parameters

➢ **Compile a summary of accomplishments, results and present conditions to interested and affected people**

➢ **End project close out and conclusion**

❖ **Party!! For team & support staff**