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,

- ° 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

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

➢ **FAQ for future rollout endeavors**
- Create a list of best practices
- Identfy activities that produced results and improvements
- Identfy 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**