

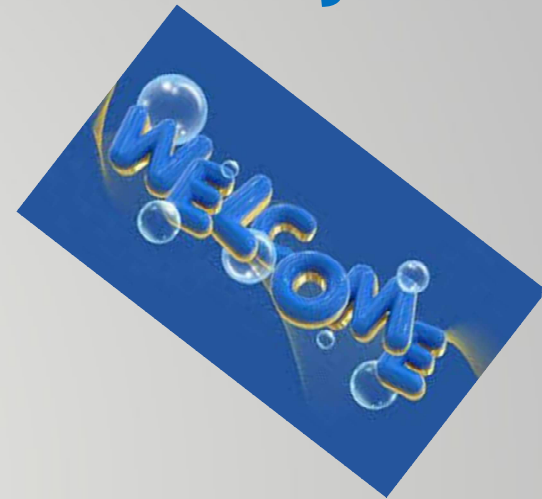
# TEAM-BASED PRODUCTIVITY

BUILDING EFFECTIVE, SUSTAINABLE AND  
HIGH-PERFORMING TEAMS



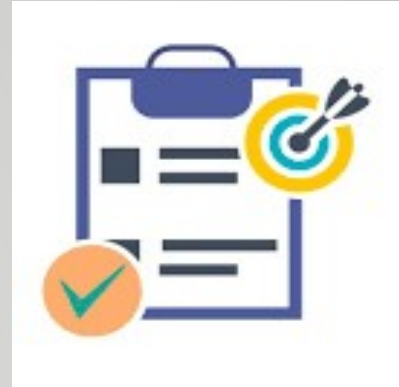
# Introductory Outline: Team-Based Productivity

- Welcome & Purpose of the Programme
  - Why Team-Based Productivity is critical in today's workplace
  - The link between effective teams and organisational success
- Course Objectives
  - Determine team's purpose and strategic direction
  - Set and achieve SMART goals aligned with organisational objectives
  - Leverage individual strengths to enhance team performance, using the Belbin Team Roles framework
  - Build trust, enhance communication, and resolve conflicts
  - Apply continuous improvement tools
  - Strengthen collaboration through experiential activities
  - Create a lasting team-first culture and shared identity



# Introductory Outline: Team-Based Productivity

- Expected Outcomes
  - Clear team purpose and goals
  - Identification of team SWOT
  - Indication of team gaps
  - Practical collaboration and problem-solving tools
  - Action plan for sustaining high performance



# Course Agenda



## DAY 1

**SESSION 1:** Overview of Team-Based Productivity

**SESSION 2:** Team Leadership and Followership

**SESSION 3:** Belbin Team Roles

## DAY 2

**SESSION 4:** Team Alignment: Vision/Mission Statements that lead to Day-to-Day Work

**SESSION 5:** Team Alignment: Drivers / Measures / Performance Indicators (PIs) / Key PIs (KPIs) | Responsibility / Benchmark / Targets

## DAY 3

**SESSION 5:** Team Alignment: *Continuing...*

**SESSION 6:** Business Process Improvement: Practical Problem-Solving Skills

## Day 4/5

**SESSION 6:** Business Process Improvement: *Continuing...*

**SESSION 7:** Effective Team Sustainability



# Session Logistics

Trainers Intro

Health and Safety (Fire...)

Conveniences

Days / Timings,  
including breaks

Mobile devices  
(telephones, tablets etc)  
- please turn off or put to  
silent mode

Team Introductions

# Team Introduction

**Individual  
& Team  
Name**

**Your current  
deliverable**

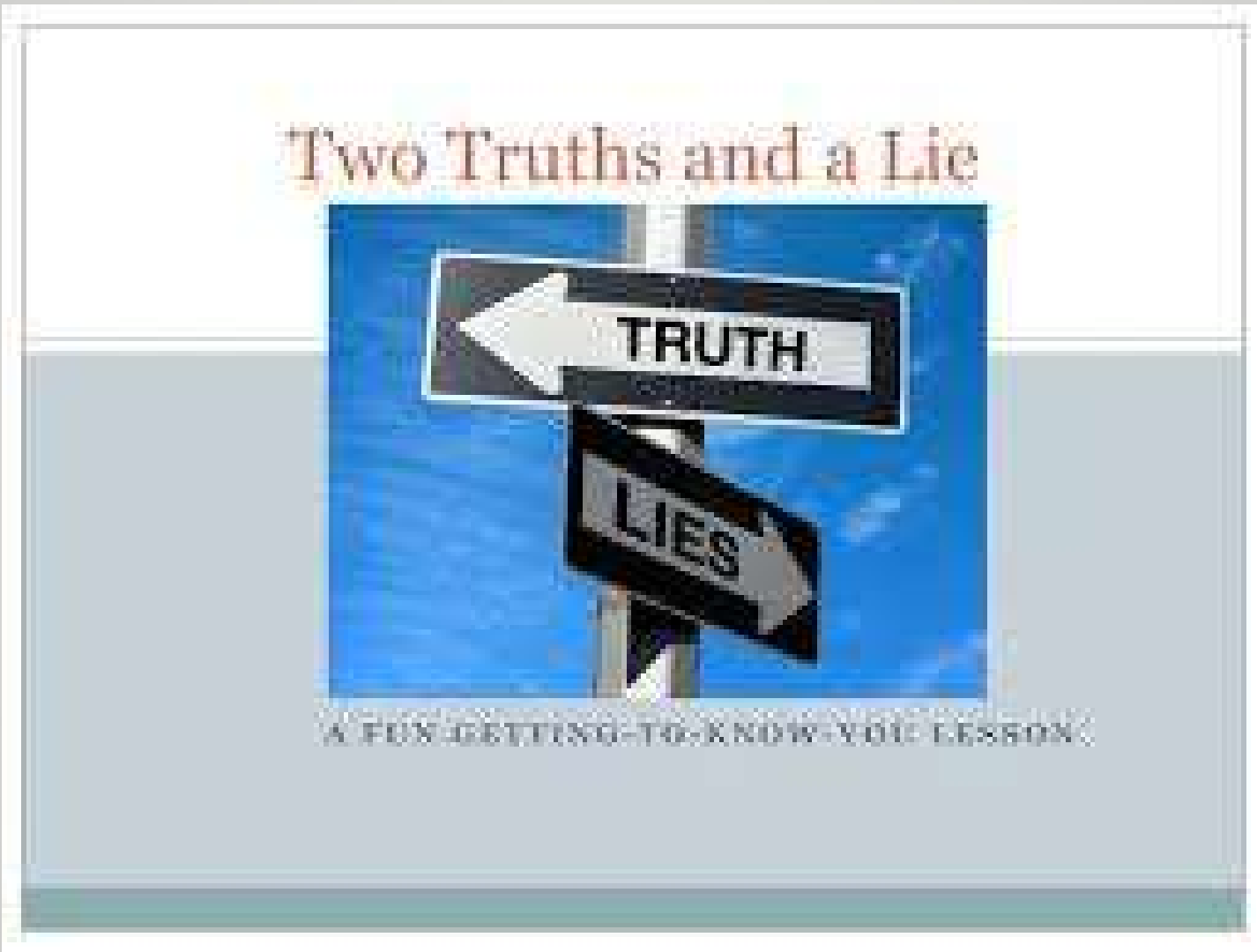
**Problem-solving  
skills awareness  
and/or experience**

**Expectations for  
the Programme**





# Ice Breakers





# SESSION 1

# OVERVIEW OF TEAM-BASED PRODUCTIVITY

# Team Performance Maturity Model

Below shows 4 stages of maturity for typical team evolution:

## 1. Reactive (Adhoc / Firefighting) Team

- Work is mostly individual
- Limited coordination
- Problems solved in isolation
- Unpredictable, with frequent bottlenecks and inconsistent quality



## 2. Coordinated (or Structured) Team

- Roles are clearer
- Some collaboration exists
- Basic processes emerge
- Some predictable and improved workflow

# Team Performance Maturity Model (2)

Teams typically evolve through several stages of maturity:

## 3. Performing (Process-Oriented) Team

- Strong collaboration
- Shared goals and accountability
- Established and documented workflows
- Efficient, reliable, and consistently delivers high-quality results.



## 4. High-Performing (Optimised) Team

- High trust and autonomy – fully aligned
- Continuous improvement mindset
- Innovation and collective ownership
- Integrated workflows consistently deliver exceptional results and strategic advantage for the organisation

# Exercise



## **Team Performance Maturity Model**

- What is your team's maturity level?
- What can make your team more effective?

# Team-Based Productivity – An Overview

## Why Team-Based Productivity is Critical in Today's Workplace

In today's fast-paced and interconnected workplace, success depends on how effectively teams collaborate, communicate, and deliver results.

Team-based productivity is not just about working together, it is about:

- leveraging diverse strengths
- fostering shared accountability, and
- driving innovation.

This approach enables organisations to:

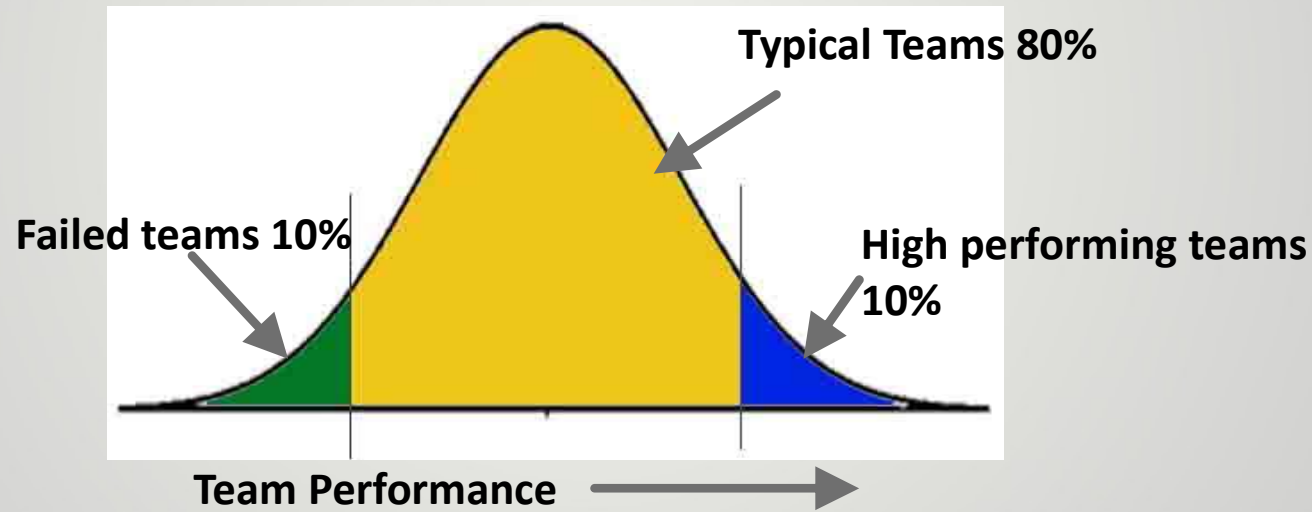
- adapt quickly
- achieve consistent performance, and
- build a culture where every team member contributes to collective success.



# Team-Based Productivity – An Overview

## Highly Successful Teams

The graph shows the typical performance of teams from poor performing to top class. This statistic generally happens by pure chance. Of the typical teams, they range from near failure to reasonably good but with an average of 'not impressive'.



**What we want to do is:  
to intentionally make happen what generally happens by chance.**

# Team-Based Productivity – An Overview

## What is an Effective Team?

An **effective team** is a group of individuals who work collaboratively toward a **shared goal**, leveraging their diverse skills, perspectives, and strengths to achieve high performance and deliver meaningful results.

Effective teams communicate openly, trust one another, understand their roles, and remain aligned with organisational objectives.

They are motivated by shared purpose, demonstrate accountability, and continuously seek improvement for collective success.



# Team-Based Productivity – An Overview

## How to make a Team Effective/Productive

Building an effective and productive team requires intentional effort, strong leadership, and a supportive work environment. The following key strategies help teams perform at their best:

- ❑ **Set Clear Goals and Expectations** – Ensure every team member understands the team’s purpose, objectives, and success measures.
- ❑ **Establish Defined Roles and Responsibilities** – Clarify who does what to avoid confusion and promote accountability.
- ❑ **Promote Open Communication** – Encourage honest dialogue, active listening, and feedback to build trust and transparency.
- ❑ **Foster Collaboration and Inclusion** – Value diverse perspectives and ensure everyone feels heard and respected



# Team-Based Productivity – An Overview

## How to make a Team Effective/Productive (2)

- ❑ **Provide Resources and Support** – Equip the team with the tools, time, and training needed to perform effectively.
- ❑ **Encourage Continuous Improvement** – Regularly review performance, celebrate wins, and learn from challenges.
- ❑ **Recognise and Reward Contributions** – Appreciate individual and team achievements to boost motivation and morale.
- ❑ **Build Trust and Psychological Safety** – Create an environment where team members feel safe to share ideas and take risks.



**When these elements are in place, teams become more engaged, innovative, and committed — driving higher productivity and organisational success.**

# Team-Based Productivity – An Overview

## EFFECTIVE TEAMS

**T**OOLS **E**NHANCE **A**SSOCIATIONS AND **M**ENTORING **S**YSTEMS

**T**OOLS

- WHAT TOOLS DO YOU REQUIRE?

**E**NHANCE

- CAN THEY MAKE RELATIONSHIPS BETTER?

**A**SSOCIATIONS &

- IS THERE MUTUAL RESPECT AND LEARNING?

**M**ENTORING

- HOW DO YOU GET THIS TO WORK FOR YOU?

**S**YSTEMS

- PATRONISE THEM!

**TAKING ADVANTAGE OF WELL-MANAGED WORKPLACE DIVERSITY**

# Team-Based Productivity – An Overview

## TAKING ADVANTAGE OF WELL-MANAGED WORKPLACE DIVERSITY – TOOLS

- ❑ As a team player, what will you bring to the table? Is there some ingenuity or innovativeness that can be derived?
- ❑ The attributes and specific strengths of individual members of a team are meant to complement those of others
- ❑ Does the team player have the confidence and atmosphere to contribute what he/she possesses towards the attainment of the team's objectives?
- ❑ There should be interdependency rather than dependency

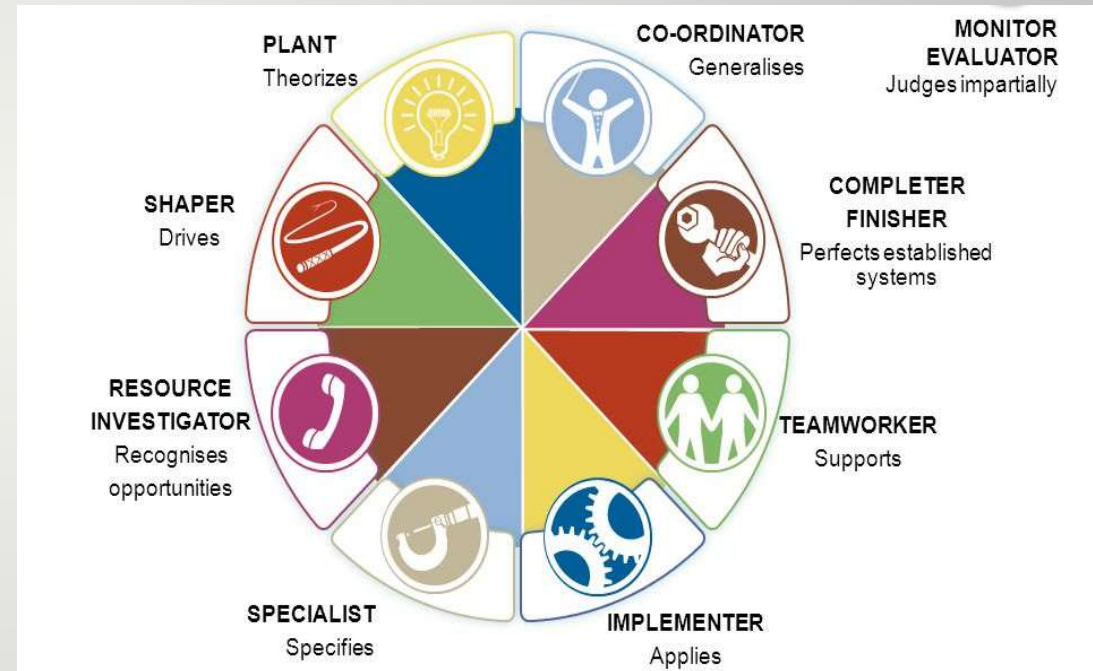


# Team-Based Productivity – An Overview

## TAKING ADVANTAGE OF WELL-MANAGED WORKPLACE DIVERSITY – ENHANCE

Consideration should lay emphasis on the purpose that was intended when the group was formed

Will the team effort produce synergy from an interdependence of individual strength?



Are there clear goals to be attained?

# Team-Based Productivity – An Overview

## TAKING ADVANTAGE OF WELL-MANAGED WORKPLACE DIVERSITY – ASSOCIATIONS

- ❑ How would a well-managed workplace diversity promote relationships?
- ❑ Will the organisational or team culture enable mutual respect?
- ❑ Is there a willingness to work together for the benefit of the entire organisation rather than for selfish and myopic reasons?
- ❑ Is there an active and genuine encouragement for junior members of staff to participate in discussions?



# Team-Based Productivity – An Overview

## TAKING ADVANTAGE OF WELL-MANAGED WORKPLACE DIVERSITY – MENTORING

### What is your take on MENTORING?

- ❑ How do you recognise who your mentors are?
- ❑ How should the mentee approach the mentor? Will there be openness towards this?
- ❑ What should the role of the mentor be?



Mentoring - Jack Welch - Former CEO Chairman for GE - YouTube.flv

# Team-Based Productivity – An Overview

## TAKING ADVANTAGE OF WELL-MANAGED WORKPLACE DIVERSITY – SYSTEMS

Systems tend to provide the ‘soft’ landing for new employees.

However, with time, there is a need to fine-tune these systems in order to deliver improved results.



Save  
Yourself  
Stress  
Time  
Energy and  
Money  
Successfully

# Team-Based Productivity – An Overview

## The Link Between Effective Teams and Organisational Success

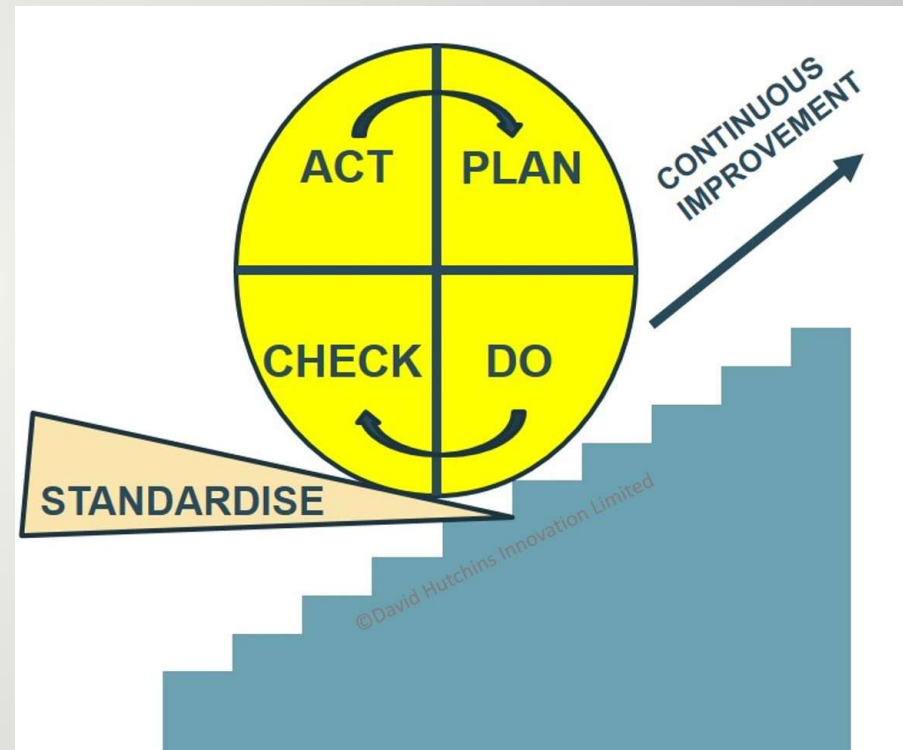
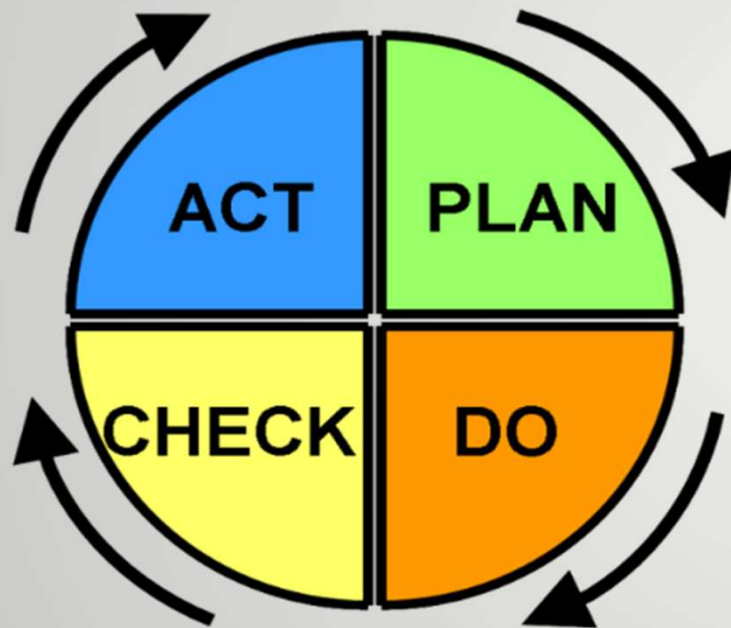
Effective teams are the backbone of every successful organisation. When individuals collaborate efficiently, share knowledge, and align their efforts toward common objectives, productivity and innovation naturally increase. Strong teams drive better decision-making, improve service delivery, and create a positive work culture that attracts and retains top talent.



Fostering teamwork enables quicker response to challenges, adaptation to change, and maintaining a consistent focus on performance and results. In essence, **effective teams translate organisational goals into measurable success**

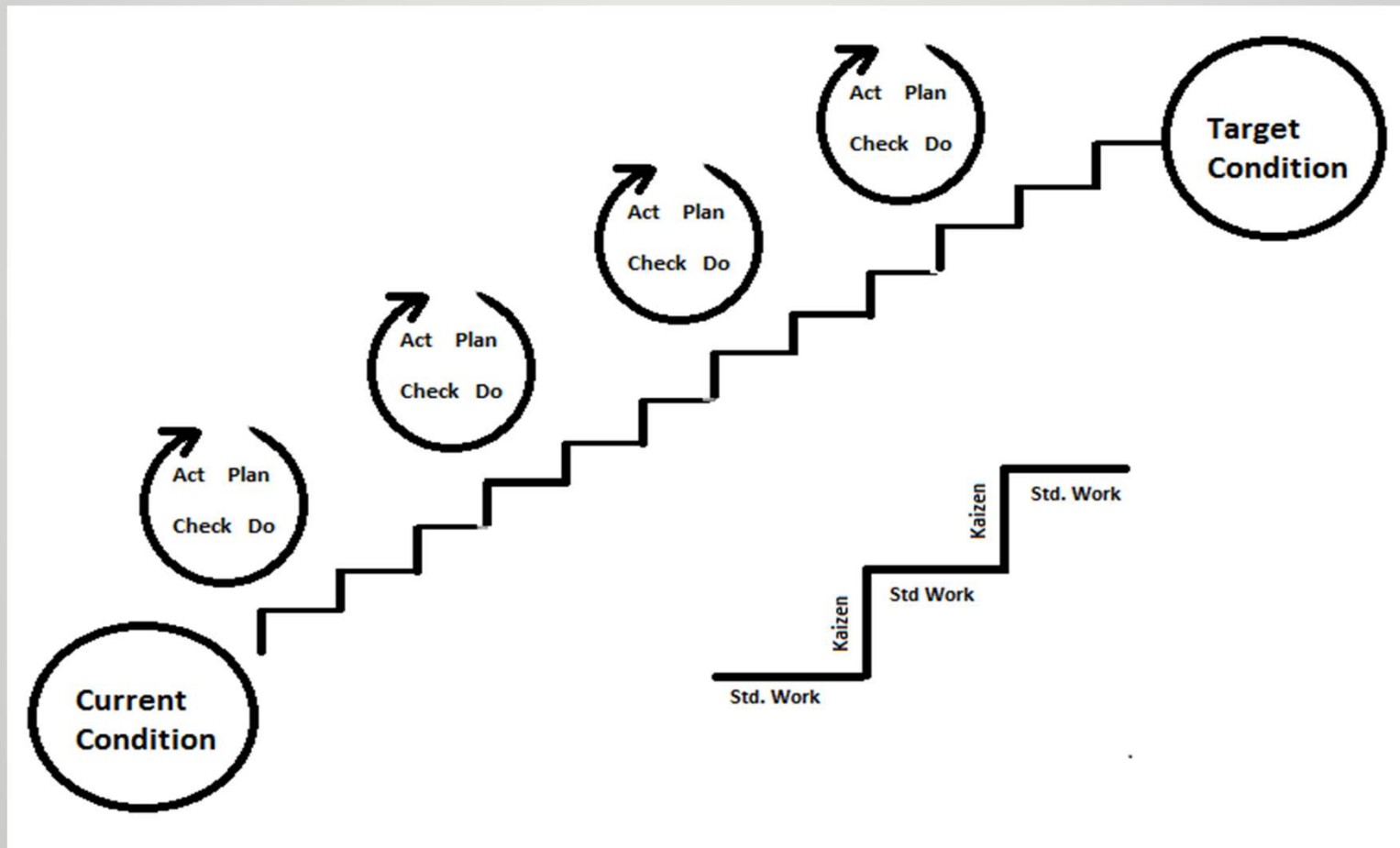
# Team-Based Productivity – An Overview

How to make an Effective Team Function – Using the PDCA Concept



# Team-Based Productivity – An Overview

How to make Effective Team Function – Using the PDCA Concept





# Continuous Improvement in High-Performing Teams

**High-Performing Teams continuously improve how they work.**

During this programme we will explore tools such as:

- Root Cause Analysis
- 5 Whys
- Fishbone (Ishikawa) diagrams
- Pareto analysis

These tools help identify the real causes of problems and implement sustainable improvements.



**SESSION 2**

**TEAM**

**LEADERSHIP & FOLLOWERSHIP**



# Team Leadership

**An essential part of getting results through people is good leadership**

When teams choose their own leader, they usually select the person whom they think is most likely to take them where they want to go. It is usually, but not always the most popular person or perhaps the one they have most confidence in or the one who knows the most. The choices vary according to the situation.



For example, if the group were stuck high up on a mountain in a blizzard, popularity would be a minor consideration. The group would almost certainly select the one whose mountaineering knowledge was most likely to get them to safety regardless of his or her popularity. If it were for the organisation of a social function, the choice of leader would probably be different again.

**The choice of leader of for a team is critically important.  
There will be untold friction if people do not like the leader!**



# Exercise



Discuss and write down some  
Leadership and Followership  
Responsibilities

# Team Leadership

## Responsibilities of a Leader

To work **with the group** to:

- Gain consensus in the identification of the aims and vision for the department, purpose and direction – define the activities (the tasks)
- Identify resources, people, processes, systems and tools (inc. financials, communications, IT)
- Create the plan to achieve the tasks – deliverables, measures, timescales, strategy and tactics
- Establish responsibilities, objectives, accountabilities and measures, by agreement and delegation
- Set standards, quality, time and reporting parameters
- Support and maintain activities against agreed parameters



# Team Leadership

## Responsibilities of a Leader

To work with the group to:

- Monitor and help to ensure maintenance of the overall performance of the group against their agreed plan
- Report on progress towards the group's aim
- Review, re-assess, adjust plan, methods and targets as necessary
- Establish, agree and communicate standards of performance and behaviour
- Establish style, culture, approach of the group – soft skill elements
- Monitor and maintain discipline, ethics, integrity and focus on objectives



# Team Leadership

## Responsibilities of a Leader

To work **with the group** to:

- Anticipate and resolve group conflict, struggles or disagreements
- Assess and change as necessary the balance and composition of the group
- Develop team-working, cooperation, morale and team-spirit
- Develop the collective maturity and capability of the group – progressively increase group freedom and authority
- Encourage the team towards objectives and aims – motivate the group and provide a collective sense of purpose
- Identify, develop and agree team- and project-leadership roles within group



# Team Leadership

## Responsibilities of a Leader

To work with the group to:

- Enable, facilitate and ensure effective internal and external group communications
- Identify and meet group training needs
- Give feedback to the group on overall progress; consult with and seek feedback and input from the group, understand the team members as individuals – their personality, skills, strengths, needs, aims and fears
- Assist and support individuals – plans, problems, challenges, highs and lows
- Identify and agree appropriate individual responsibilities and objectives





# Team Leadership

## Responsibilities of a Leader

To work with the group to:

- Give recognition and praise to individuals – acknowledge effort and good work
- Where appropriate reward individuals with extra responsibility, advancement and status
- Identify, develop and utilise each person's capabilities and strengths
- Train and develop individual team members
- Develop individual freedom and authority
- Support facilitators of team working
- Generate enthusiasm



# Team Leadership

## Responsibilities of a Leader

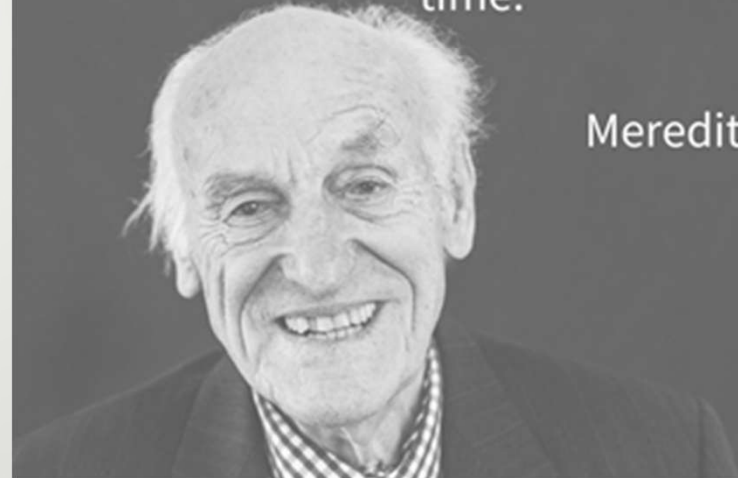
To work **with the group** to:

- Remember – membership is voluntary in self selecting teams
- Be open about the activities of the team
- Involve all the members
- Don't be too ambitious
- Use the problem-solving techniques
- Look towards solutions



" A good team leader treats members of a team like actors on a stage. There need to be exits and entrances. Not everyone is required to be on the stage at the same time."

Meredith Belbin



# Followership in High-Performing Teams

**Effective teams depend not only on leadership but also on strong followership**

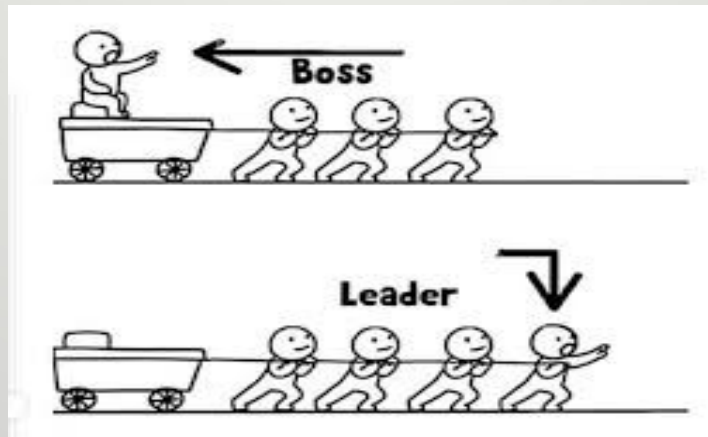
- Take ownership of responsibilities
  - Support team decisions
  - Provide constructive feedback
  - Demonstrate accountability
- Contribute ideas and innovation



# Leadership and Followership

## In High-Performing Teams, Leadership and Followership are shared

- ❑ Members lead when their expertise is needed
- ❑ Members support others when they lead
- ❑ Collaboration drives team success





## SESSION 3

# BELBIN TEAM ROLES

# Belbin Team Roles

## Key Points

- Dr Meredith Belbin's 9 clusters of behaviour
- A diverse mix of behaviours
- Each team needs the 9 roles to be a High-Performance Team (HPT), but not 9 people!
- Each team role has its strengths and weaknesses with equal importance to help team members:
  - Identify their respective and natural working style
  - Work better with others
  - Ultimately, build balanced teams



# Belbin Team Roles

## Three Ways Belbin helps teams

### ➤ 1. Strengthen decision-making

Decision-making can be a thorny issue for teams – debating which course to take means exploring opposite points of view and drawing attention to areas of difference.

### ➤ 2. Promote behavioural diversity

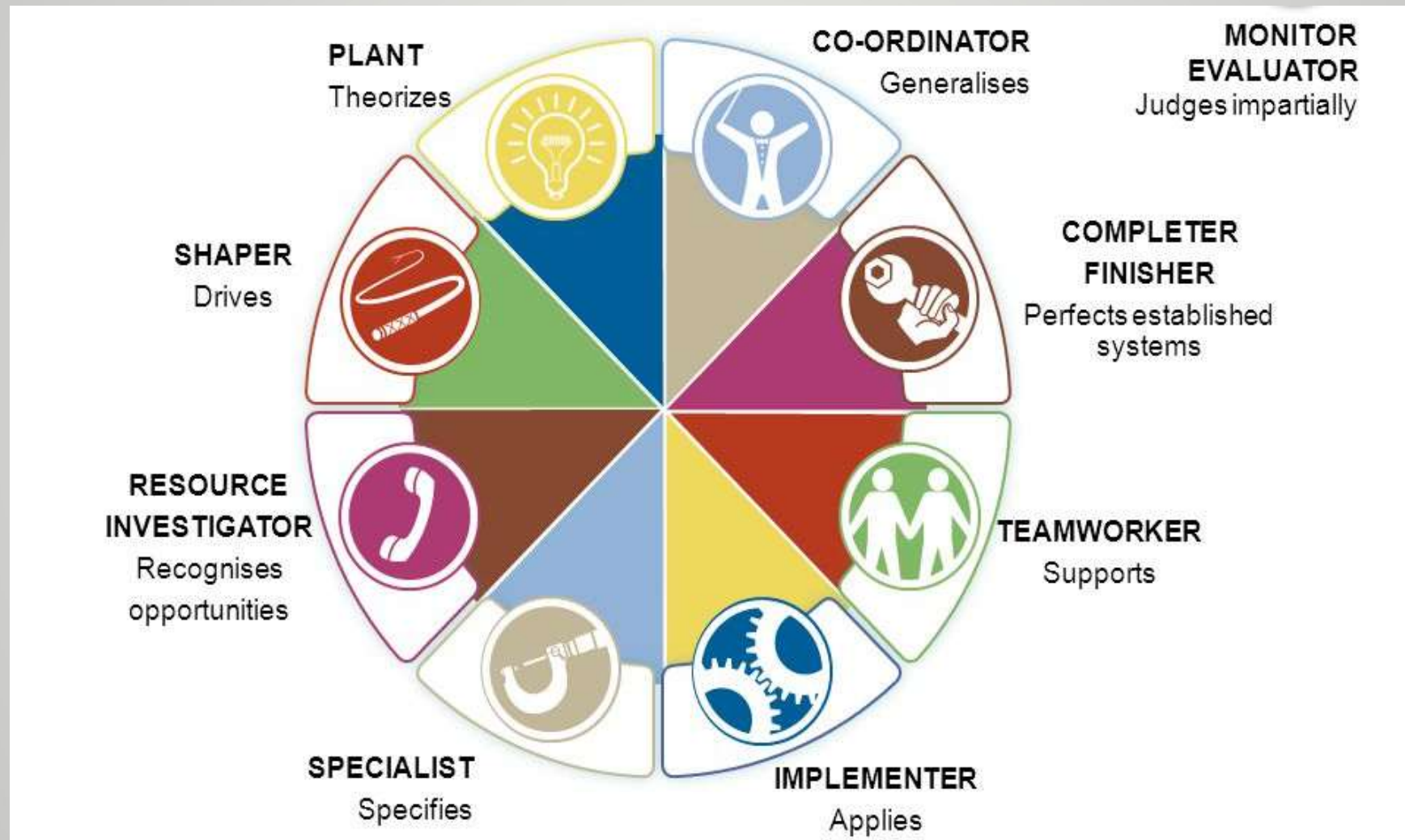
When teams obscure individuality, problems arise. Belbin encourages teams to identify diverse contributions and value others' strengths.

### ➤ 3. Empower individuals

Groupthink thrives when individuals go quiet.

Belbin enables teams to work not just collaboratively, but intelligently – challenging assumptions, valuing individuality, and avoiding the pitfalls of **GROUPTHINK**.

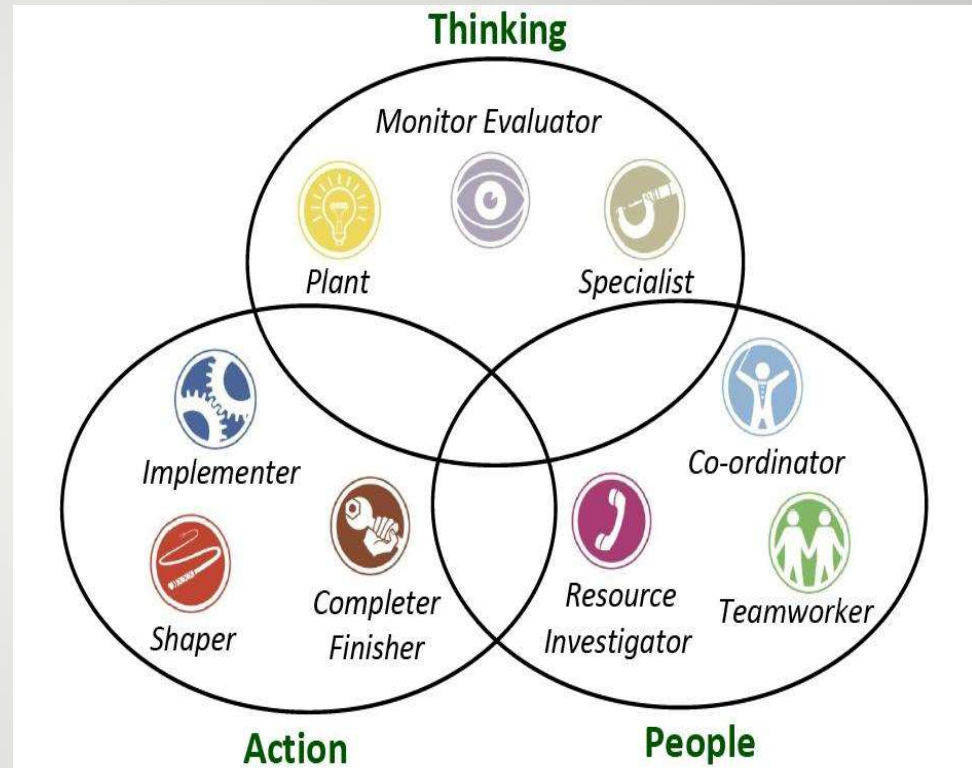
# Belbin Team Roles



# Belbin Team Roles

## Three Categories

1. ACTION-ORIENTED ROLES
2. PEOPLE-ORIENTED ROLES
3. THOUGHT-ORIENTED ROLES



Each role brings unique strengths — and some allowable weaknesses.

# Belbin Team Roles: Thought-Oriented

Belbin Type	Typical Features	Positive Qualities	Allowable Weaknesses	As a Team Role
<b>Monitor Evaluator (ME)</b>	Provides a logical eye, making impartial judgements where required and weighs up the team's options in a dispassionate, prudent and unemotional way	Sober, strategic and discerning. Sees all options and judges accurately.	Sometimes lacks the drive and ability to inspire others and can be overly critical. <b>Don't be surprised that:</b> they could be slow to come to decisions.	Specifies analysing problems, and evaluating ideas and suggestions so that the team is better placed to take balanced decisions
<b>Plant (PL)</b>	Tends to be highly creative and good at solving problems in unconventional ways. Can be individualistic, serious-minded, and unorthodox	Creative, imaginative, free-thinking, generates ideas and solves difficult problems. A genius, that possesses imagination, intellect, and knowledge	Up in the clouds, inclined to disregard practical details or protocol. Might ignore incidentals and may be too preoccupied to communicate effectively. <b>Don't be surprised that:</b> they could be absent-minded or forgetful.	Specifies advancing new ideas and strategies with special attention to major issues; and looking for possible breaks in approach to the problems with which the group is confronted.
<b>Specialist (SP)</b>	Brings in-depth technical knowledge of a key area to the team.	Single-minded, self-starting and dedicated. They provide specialist knowledge and skills. Can be relied upon to complete their job with the minimum of fuss.	Are known to get bogged down in the details. <b>Don't be surprised that:</b> they can overload people with information such that the tiniest thought can lead to them losing sight of the overarching objectives.	With an encyclopaedia knowledge of their subject, they bring in-depth knowledge and analysis to a team's strategy. Able to call upon extensive wisdom and skills in a given area, they are looked upon as an expert in the team – and one who can be called on to provide expertise.

# Belbin Team Roles: Action-Oriented

Belbin Type	Typical Features	Positive Qualities	Allowable Weaknesses	As a Team Role
<b>Implementer (IM)</b>	Needed to plan a workable strategy and carry it out as efficiently as possible. They are conservative, dutiful, and can be predictable	Practical, reliable, efficient and hardworking. Turns ideas into actions and organises ability, common sense, and self-discipline	Can be a bit inflexible and slow to respond to new possibilities. <b>Don't be surprised that:</b> they might be slow to relinquish their plans in favour of positive changes.	Specifies turning concepts and plans into practical working procedures; and carrying out agreed plans systematically and efficiently.
<b>Shaper (SH)</b>	Outgoing, dynamic and provides the necessary drive to ensure that the team keeps moving and does not lose focus or momentum.	Has the drive and courage to overcome obstacles, thrives on pressure and is ready to challenge inertia, ineffectiveness, complacency or self-deception	Can be prone to provocation, irritation and impatience, and may sometimes offend people's feelings. <b>Don't be surprised that:</b> they could risk becoming aggressive and bad-humoured in their attempts to get things done.	Specifies shaping the way in which team effort is applied; directing attention generally to the setting of objectives and priorities.
<b>Completer Finisher (CF)</b>	Most effectively used at the end of tasks to polish and scrutinise the work for errors, subjecting it to the highest standards of quality control.	A capacity for follow through, Perfectionism. Painstaking, conscientious, anxious. Searches out errors. Polishes and perfects.	A tendency to worry unduly about small things and has a reluctance to "let go" and delegate. <b>Don't be surprised that:</b> they could be accused of taking their perfectionism to extremes.	The Completer Finisher specifies ensuring that the team is protected as far as possible from mistakes.

# Belbin Team Roles: People-Oriented

Belbin Type	Typical Features	Positive Qualities	Allowable Weaknesses	As a Team Role
<b>Co-ordinator (CO)</b>	Needed to focus on the team's objectives, draw out team members and delegate work appropriately.	Mature, calm, confident, identifies talent, and clarifies goals. Possesses a capacity for treating and welcoming all potential contributors on their merit and without prejudice. A strong sense of objectives.	Can be seen as manipulative and might offload their own share of the work. <b>Don't be surprised that:</b> they might over-delegate, leaving themselves little work to do.	Specifies controlling the way in which a team moves towards the group objectives by making the best use of team resources; recognising where the team's strengths and weaknesses lie.
<b>Resource Investigator (RI)</b>	Use their inquisitive nature to find ideas to bring back to the team.	Outgoing, enthusiastic. Explores opportunities and develops contacts. They start with a surge of enthusiasm for new ideas.	Liable to lose interest once the initial fascination has passed. Can be over-optimistic! <b>Don't be surprised that:</b> they might forget to follow up on a lead.	Specifies exploring and reporting the ideas, developments and resources outside the group.
<b>Teamworker (TW)</b>	Socially orientated, rather mild, sensitive and helps the team to gel, using their versatility to identify the work required and complete it on behalf of the team.	Co-operative, perceptive and diplomatic. Listens and averts friction. Has an ability to respond to people and to situations and to promote team spirit	Can be indecisive in moments of crisis and tends to avoid confrontation. <b>Don't be surprised that:</b> they might be hesitant to make unpopular decisions.	Specifies supporting members in their strengths (e.g. building on suggestions); underpinning members in their shortcomings.



# Exercise



Identify Personality Types – in your respective groups



# From Team Roles to Team Direction

- Understanding team roles helps us appreciate how individuals contribute to team effectiveness
- However, knowing our roles is only the first step
- High-performing teams must align their strengths toward a shared purpose

- Then the team works out the:
  - Vision
  - Mission
  - Drivers
  - PI's / KPIs

# From Vision to Performance Measurement

High-Performing Teams translate strategy into measurable results





## SESSION 4

**TEAM ALIGNMENT:  
VISION AND MISSION STATEMENTS  
THAT LEAD TO DAY-TO-DAY WORK**



**To be able to deliver what is expected of us, we need to be clear on how it relates to the tasks we perform!**







# **Creating the Vision Statement**

# Creating your Vision and Mission Statements

How to get started?

Start from where you are with a clean sheet of paper!





# Creating your Vision and Mission Statements – the Hoshin Kanri way

What you create now will be unique, bespoke and designed in house by **YOU**, based on **YOUR** logic and eventually, the logic of your collective Management Team

**This is your Hoshin Kanri way**

**It will be YOUR way**

**It will be ‘the way we do things around here.’**

# Creating your Vision – *Imagineering*...



## **IMAGINEERING...**

**We are top of our game in delivering on our requirements in my team**

**“If we can dream it, we can make it happen”  
Walt Disney!**

# Creating your Vision – *Imagineering*...

## DETERMINE YOUR **VISION**



Where do you see yourself or department/division in the next five years?

# Creating your Vision – Put pen to paper...



For example, your  
Vision Statement  
might be:

**“My team is number  
one in the efficient  
delivery of what is  
required of us”**

# Creating your Vision Statement



## 1st Exercise

### Individually...

- Write what you want to see (where you see yourself) in five (5) years from your point of view
- Write down the 5-6 short descriptive things that are most important to you as a person, and that you will judge this by in 5 years' time
  - For example, '*to have an active suggestion scheme*' or '*deliver on time with no waste*'
  - This is what success will mean to you
- **Underline** the key words on each statement

# Creating your Vision Statement



Have 5 to 6 descriptive things on the Post It stickers (or suggestions) per individual



Write just one idea on each sticker that is important to you



When you have completed your stickers, determine the affinity they have with one another (put similar items together)



Post them on the wall as shown here (or display on your virtual board)





# Exercise



Create Vision Statements



# **Developing the Mission Statement and Identifying the Drivers**

# Creating your Vision – Put pen to paper...

For example, your Vision Statement might be:

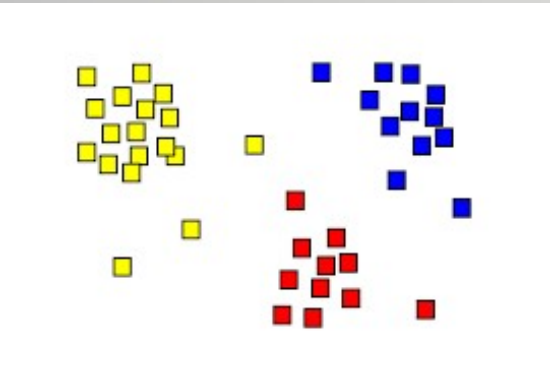
**“My team is number one in the efficient delivery of what is required of us”**



We now need the

**Mission Statement**

# Developing your Mission Statement from the Vision – Using the Drivers



- For each cluster...
- ❖ Underline key words

Then, make a sentence that includes all the key words from the group of stickers.



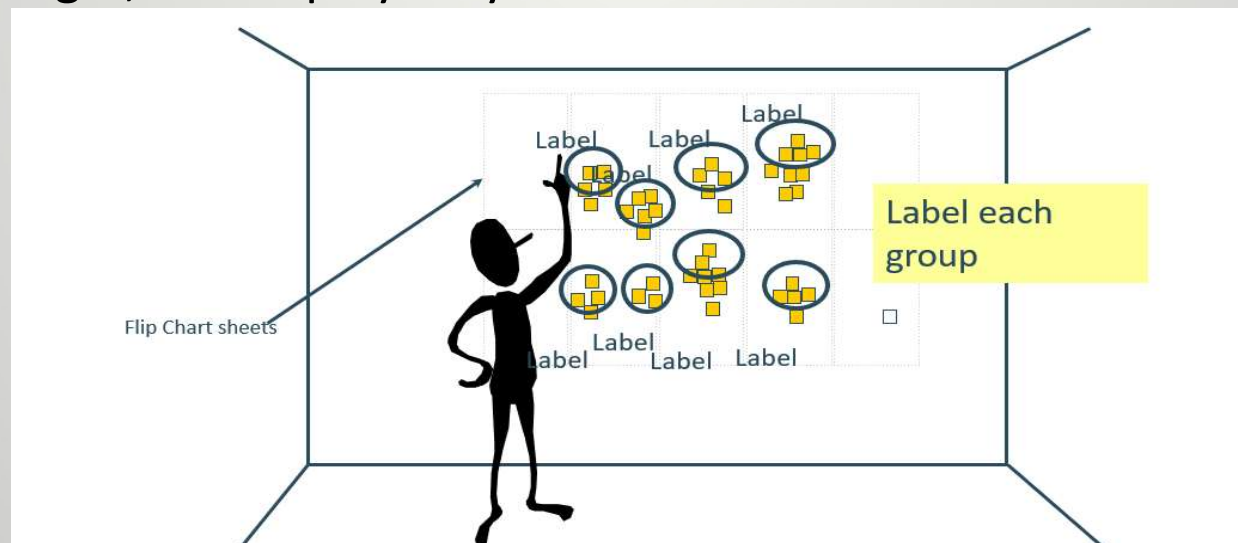


# Developing your Mission Statement from the Vision – Using the Drivers

Once they have been put in clusters, according to type, then put headings for the respective clusters.

For example, all those related to *Recipients of Outputs (Customers)* are in one group, *Supply Chain* in another, *Employees...* and so forth.

Typically, the specific categories will be similar to those identified earlier  
Whilst doing it, the display may look like this...





# Developing your Mission Statement from the Vision – Using the Drivers

The statements for each of the categories which we will refer to as the ‘Drivers’ collectively become known as the ‘Mission Statement’ for that element.

## Typical ‘Mission Statement’ for an Employee Driver

Develop the knowledge, creativity of our team to generate involvement and pride as we continually improve our business.



Underlined words from the Post it stickers

### In your work or home life

Just for fun, why not get your family or some friends together, give them all some ‘post it’ stickers and create a vision for a holiday! Or your dream home, dream car etc.

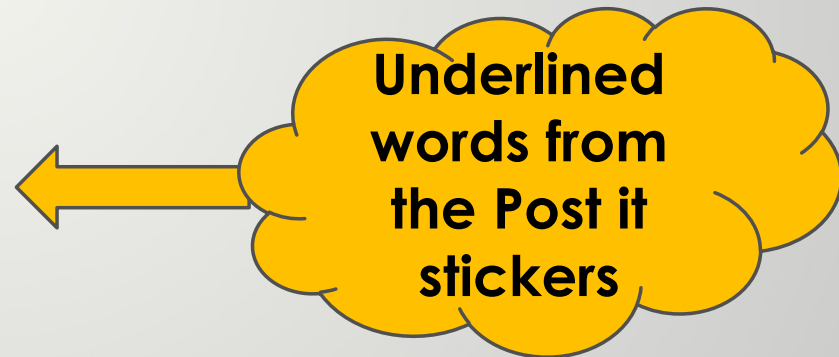


# Developing your Mission Statement from the Vision – Using the Drivers

**We can do this for each of the Drivers**

**Here is a typical one for our relationship with our customers**

To be our customer's first choice by identifying and satisfying both their stated and unstated needs and developing collaborative and partnership style relationships to generate trust and stability to achieve world class recognition

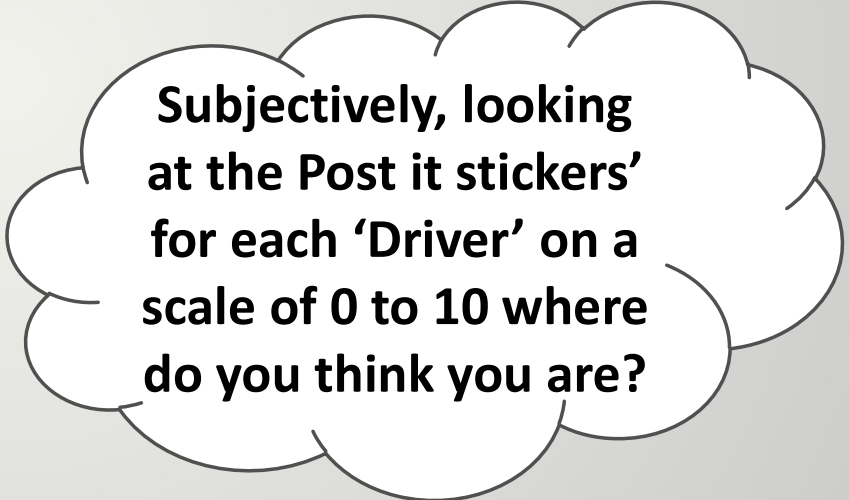




# Developing your Mission Statement from the Vision – Using the Drivers

**The typical categories, which we call ‘DRIVERS’ are**

- Customer
- Employee
- Suppliers
- Processes
- Organisation
- Technology
- Finance
- Design/Development



**Subjectively, looking at the Post it stickers’ for each ‘Driver’ on a scale of 0 to 10 where do you think you are?**

# Developing your Mission Statement from the Vision

## – Using the Drivers

**POST EXERCISE REVIEW**  
Share your statements so we  
can review them



### Thoughts...

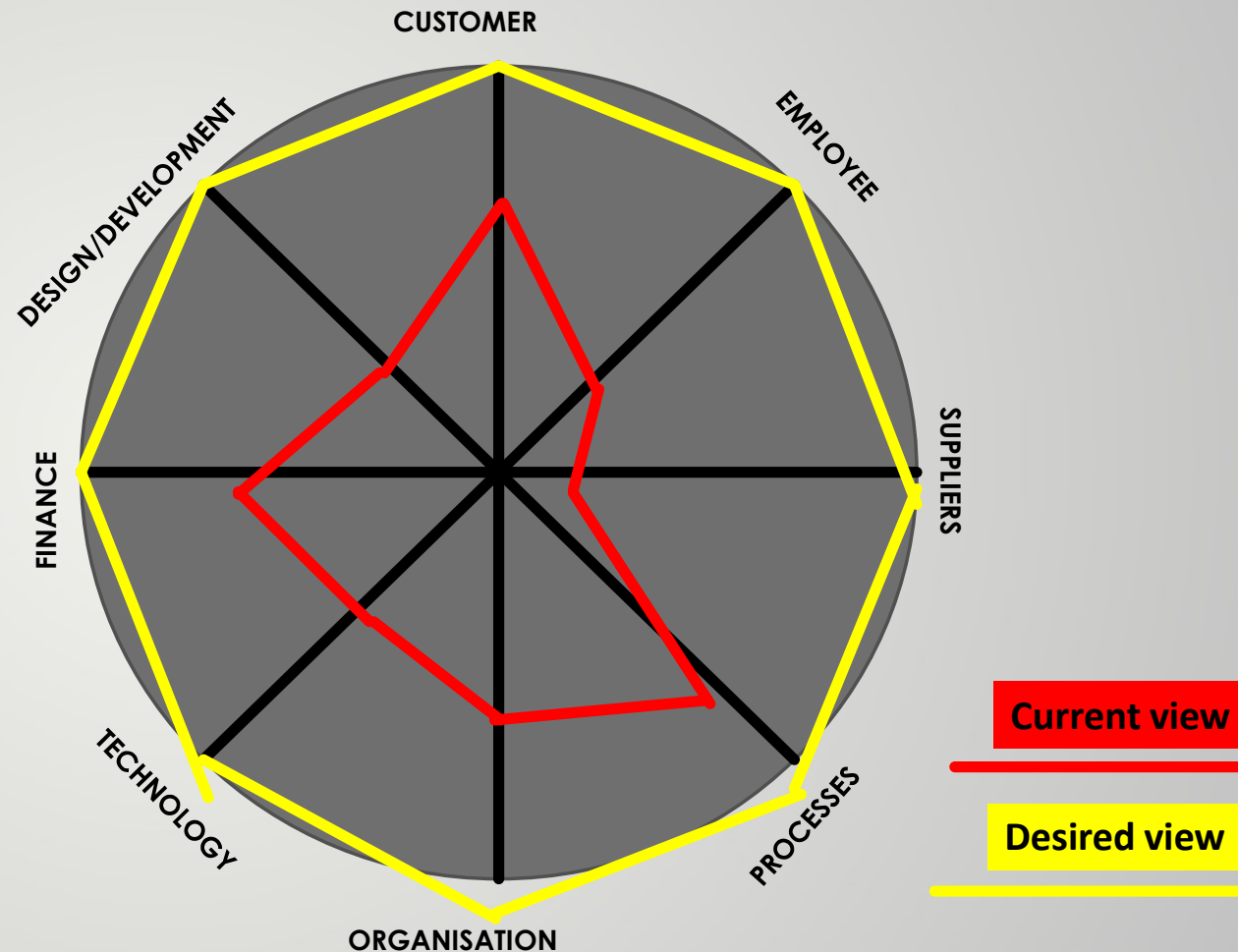
On a scale of 1 to 10, if 10 is  
where we want to be, **where**  
**do we think we are now?**

What does that feel like?

# Visualising the Vision Gap

Here is an example:  
Radar Chart showing where we are and where we want to be on the Principal Drivers

- Customer
- Employee
- Suppliers
- Processes
- Organisation
- Technology
- Finance
- Design/Development



Where do you think you are on each of these?



# Developing your Mission Statement from the Vision

## – Using the Drivers

**Drivers are the functions within the Company that we need to energise to get from where we are to where we want to be**

Typically, these are:

- **Recipients of our Outputs (Internal/External Customers)** – we do need to ascertain their needs
- **Supply Chain** – those who provide the information/data/materials that we require to process our Outputs
- **Organisation culture** – how we manage our people
- **Employees** – what do we need from them to help achieve the Vision
- **Market Research** – identify ‘Customer needs’
- **Product/Service development** – prompted by the market/customers
- **Processes** – including process management/enhancement
- **Technology** – new systems into the organisation and innovations
- **Design/Development** – for example, Software, ERP etc





# Exercise



Create Mission Statements and  
Indicate the Drivers



## SESSION 5

### TEAM ALIGNMENT:

DRIVERS | MEASURES | PERFORMANCE  
INDICATORS | KEY PERFORMANCE INDICATORS  
| RESPONSIBILITY | BENCHMARK | TARGETS



# **Establishing the Performance Indicators**

# From Mission Statements to Performance Indicators

These were the Post-its, see how they were used to make the statement and now how they help create the Performance indicators.

Note how in the statement the key tangible words are underlined

These words are then copied into the second column of the tree diagram to the right.

These are then broken down into the specific measures that relate to each.

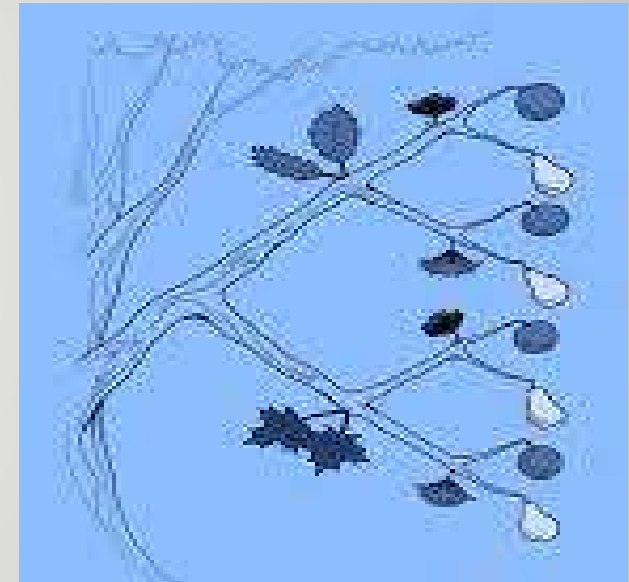
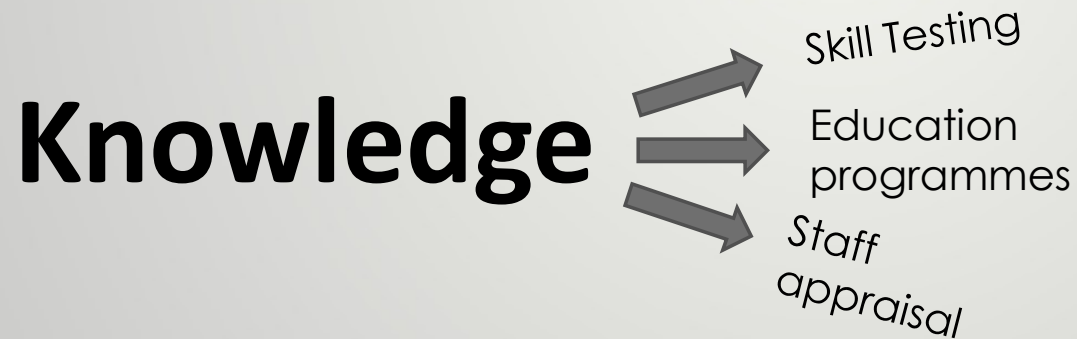
Develop the KNOWLEDGE, SKILLS and CREATIVITY of our team to generate INVOLVEMENT and PRIDE as we continually IMPROVE our BUSINESS.

DRIVERS	MEASURE	CURRENT SITUATION
KNOWLEDGE	SKILL TESTING EDUCATION PROGRAMMES STAFF APPRAISAL	
SKILLS	MULTI-SKILLING TRAINING BUDGET COURSES	
CREATIVITY	SUGGESTIONS PROJECTS INNOVATION	
INVOLVEMENT	TEAMWORK PRESENTATIONS SELF-IMPROVEMENT	
PRIDE	ABSENTEEISM SICKNESS DISPUTES LABOUR TURNOVER	
BUSINESS IMPROVEMENT	RESPONSE TO JOB ADVERTS PERFORMANCE IMPROVEMENT SCRAP REDUCTION IMPROVED DELIVERY CUSTOMER COMPLAINTS SAFETY - LOST-TIME ACCIDENTS	



# From Mission Statements to Performance Indicators

Using the Tree Diagram technique to break down generalisations into specifics; for example...



# From Mission Statements to Performance Indicators

To measure our performance, we need to be clear about what aspects will contribute to our goal attainment and establish the data to monitor them!



The **Mission Statement** created will be used to determine the **Performance Indicators** that will form the basis of measurability to monitor whether or not you are achieving your vision, rather than the fire-fighting mode we sometimes find ourselves in

# From Mission Statements to Performance Indicators

What criteria shall we judge 'being on top of your game' by?

It will mean diverse things to different people and departments/divisions.

Now you can overcome this problem as you have identified the **'Drivers'** – these are now the **'Performance Indicators'** that you think are important to achieve your **'Vision.'**

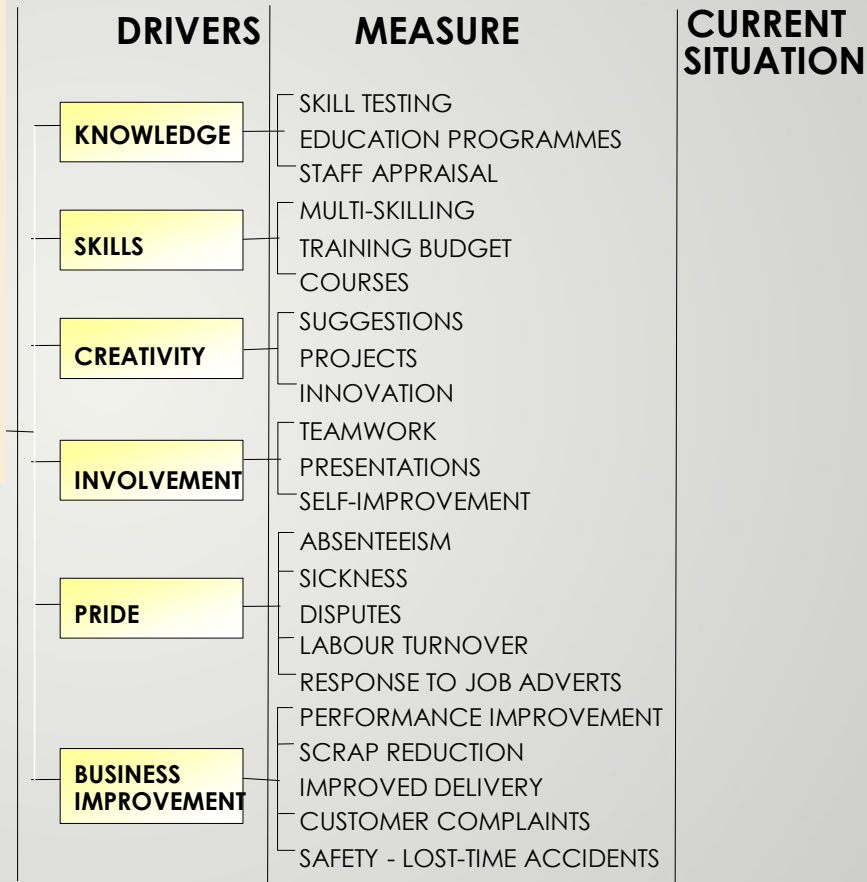


# From Mission Statements to Performance Indicators

Employees cluster

Develop the KNOWLEDGE, SKILLS and CREATIVITY of our team to generate INVOLVEMENT and PRIDE as we continually IMPROVE our BUSINESS.

So, we can see that just for this one element, it has been broken down into 22 specific Measures each of which is measurable.



# From Mission Statements to Performance Indicators

**Employees cluster**

Develop the **KNOWLEDGE**, **SKILLS** and **CREATIVITY** of our team to generate **INVOLVEMENT** and **PRIDE** as we continually **IMPROVE** our **BUSINESS**.



## CURRENT SITUATION

Not all these 22 items are equally important.

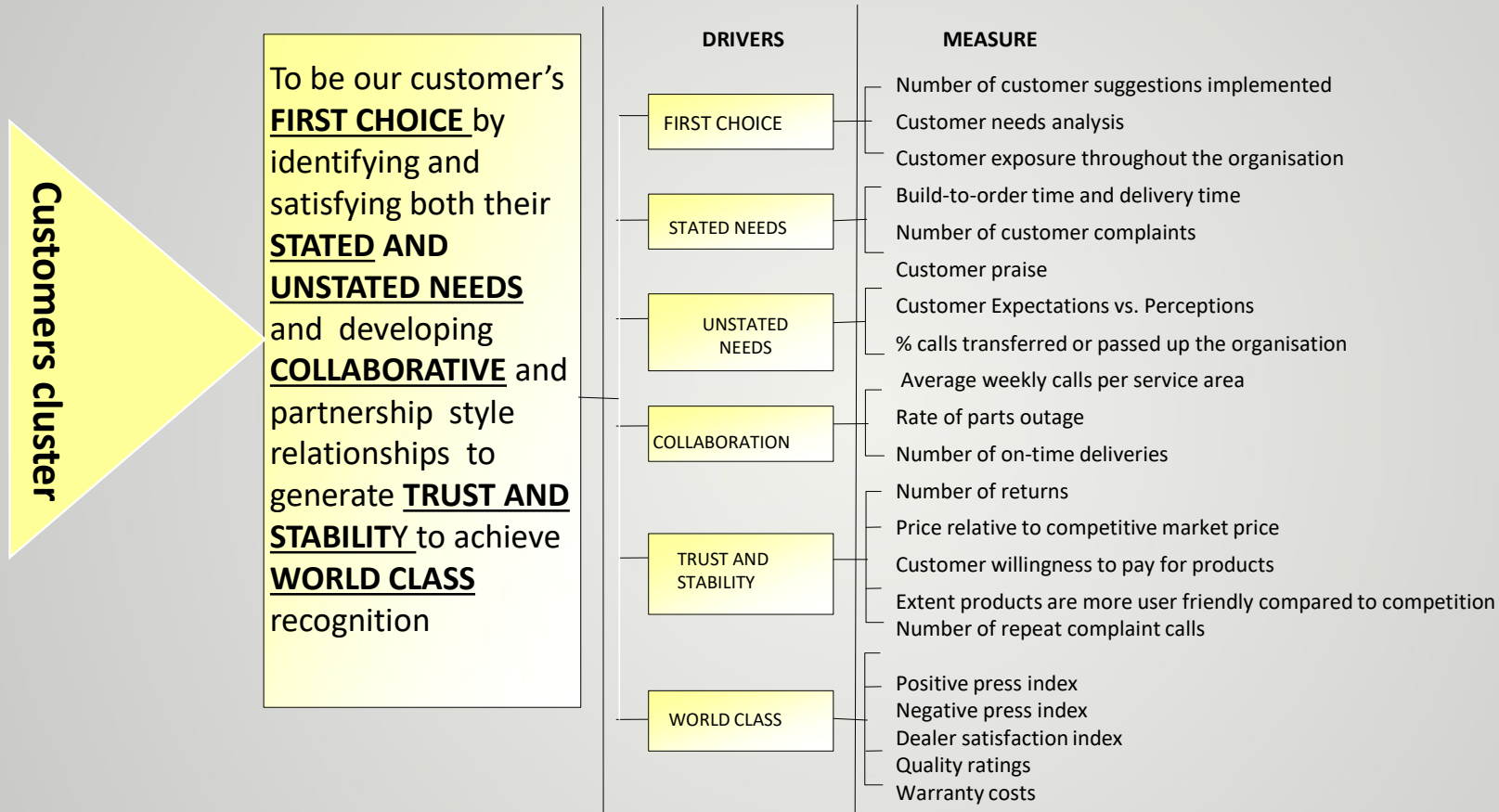
Some are **CRITICAL**

Others are

**Nice to have.**

We must prioritise

# Performance Indicators – Customer Needs



We see that there are 21 items in this group. There were 22 for the previous Driver so assuming that the other six are similar, there would be approximately 160 or so Performance Indicators. It is unlikely that any organisation could tackle this number in the first year, maybe just a few of them.



**Determining the**  
**KEY**  
**Performance**  
**Indicators**

# KEY Performance Indicators – e.g. Customer Needs

**We must decide their relative order of importance**

**We can use:**

- **Voting**
- **Conduct studies and obtain opinions**
- **Etc.**

**From this we can decide what to focus on for the first year**

## **Critical Success Factors / Success Factors**

4. Number of customer suggestions implemented
5. Customer needs analysis  
Customer exposure throughout the organisation
3. Build-to-order time and delivery time
6. Number of customer complaints
2. Customer praise  
Customer Expectations vs. Perceptions  
% calls transferred or passed up the organisation
10. Average weekly calls per service area
9. Rate of parts outage
1. Number of on-time deliveries
8. Number of returns  
Price relative to competitive market price  
Customer willingness to pay for products  
Extent products are more user friendly compared to competition
- Number of repeat complaint calls  
Positive press index  
Negative press index  
Dealer satisfaction index
7. Quality ratings  
Warranty costs

THESE THEN BECOME **KEY** PERFORMANCE INDICATORS OR CRITICAL SUCCESS FACTORS



# **Benchmarking against Key Performance Indicators (KPIs)**



# Benchmarking our KEY Performance Indicators

Now that we have a short list, we then need to set targets for each.

When we have done this, we then have our...

## **KEY** PERFORMANCE INDICATORS

Notice they are **OUR** KPI's not something either imposed on us or copied from someone else!

What we have agreed is that these are critical to **OUR** success. In fact, some organisations refer to them as **Critical Success Factors**, and not as Key Performance Indicators



# Benchmarking our KEY Performance Indicators

## **KEY** PERFORMANCE INDICATORS

So, for each KPI, we need to know what is our current performance?

Do we have the metrics?

Then we can determine our target performance?

**Example:**

**Let us go back to the 'Employee' Driver**

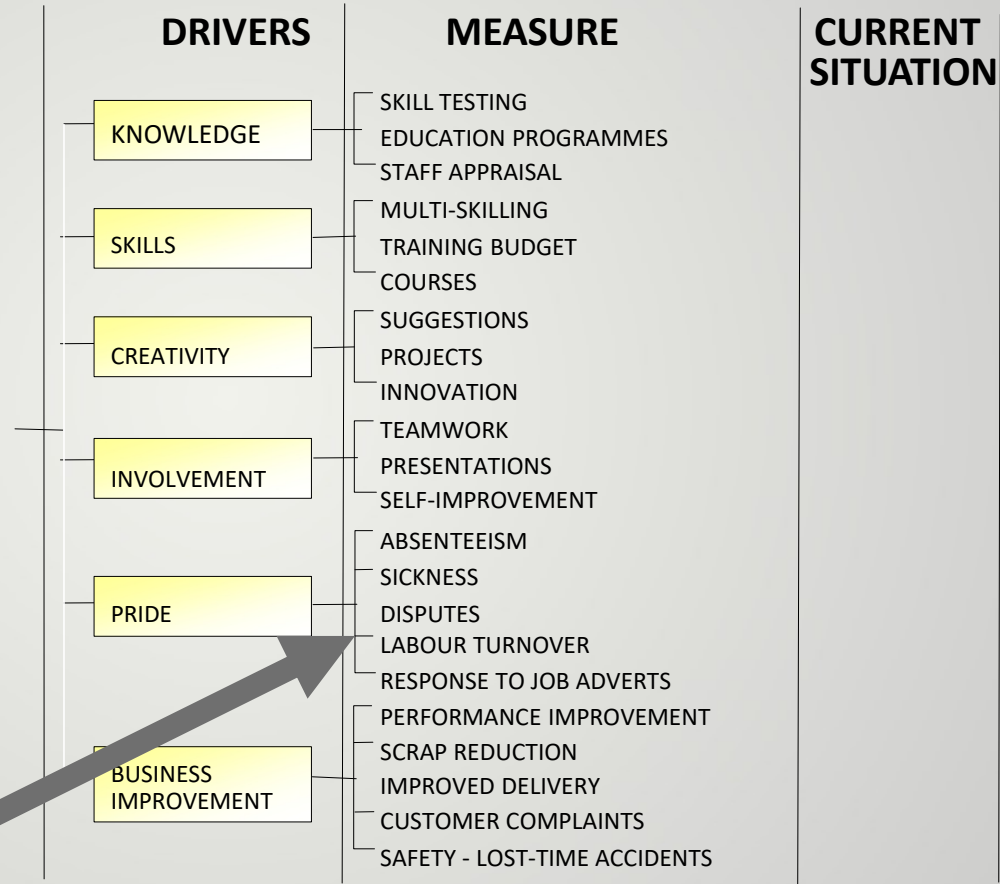
→ we need to **BENCHMARK**

# Key Performance Indicators

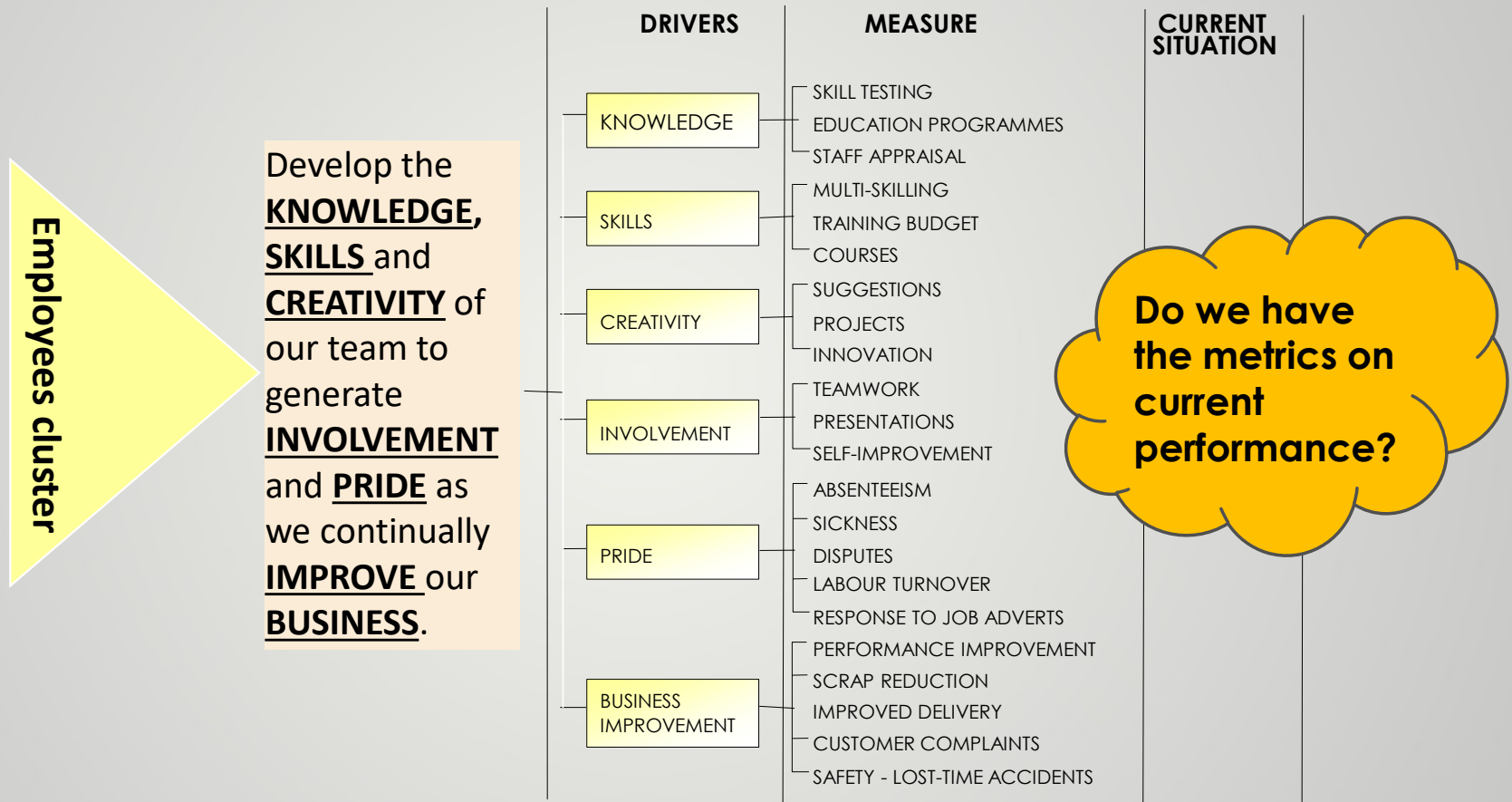
Employees cluster

Develop the **KNOWLEDGE**, **SKILLS** and **CREATIVITY** of our team to generate **INVOLVEMENT** and **PRIDE** as we continually **IMPROVE** our **BUSINESS**.

Let us look at this one:  
Labour turnover



# Key Performance Indicators



# Key Performance Indicators – e.g. Employees

DRIVERS	MEASURE	CURRENT SITUATION	TARGET
KNOWLEDGE	SKILL TESTING EDUCATION PROGRAMMES STAFF APPRAISAL		
SKILLS	MULTI-SKILLING TRAINING BUDGET COURSES		
CREATIVITY	SUGGESTIONS PROJECTS INNOVATION		
INVOLVEMENT	TEAMWORK PRESENTATIONS SELF-IMPROVEMENT		
PRIDE	ABSENTEEISM SICKNESS DISPUTES LABOUR TURNOVER RESPONSE TO JOB ADVERTS	ACHIEVING 100 per annum from 10,000 staff!	
BUSINESS IMPROVEMENT	PERFORMANCE IMPROVEMENT SCRAP REDUCTION IMPROVED DELIVERY CUSTOMER COMPLAINTS SAFETY - LOST-TIME ACCIDENTS		

*Is this good or bad?  
Looks good, but we  
cannot be too sure!*

# Key Performance Indicators – e.g. Employees



ACHIEVING 100 per annum from 10,000 staff!

**We need to BENCHMARK**

# Key Performance Indicators – e.g. Employees



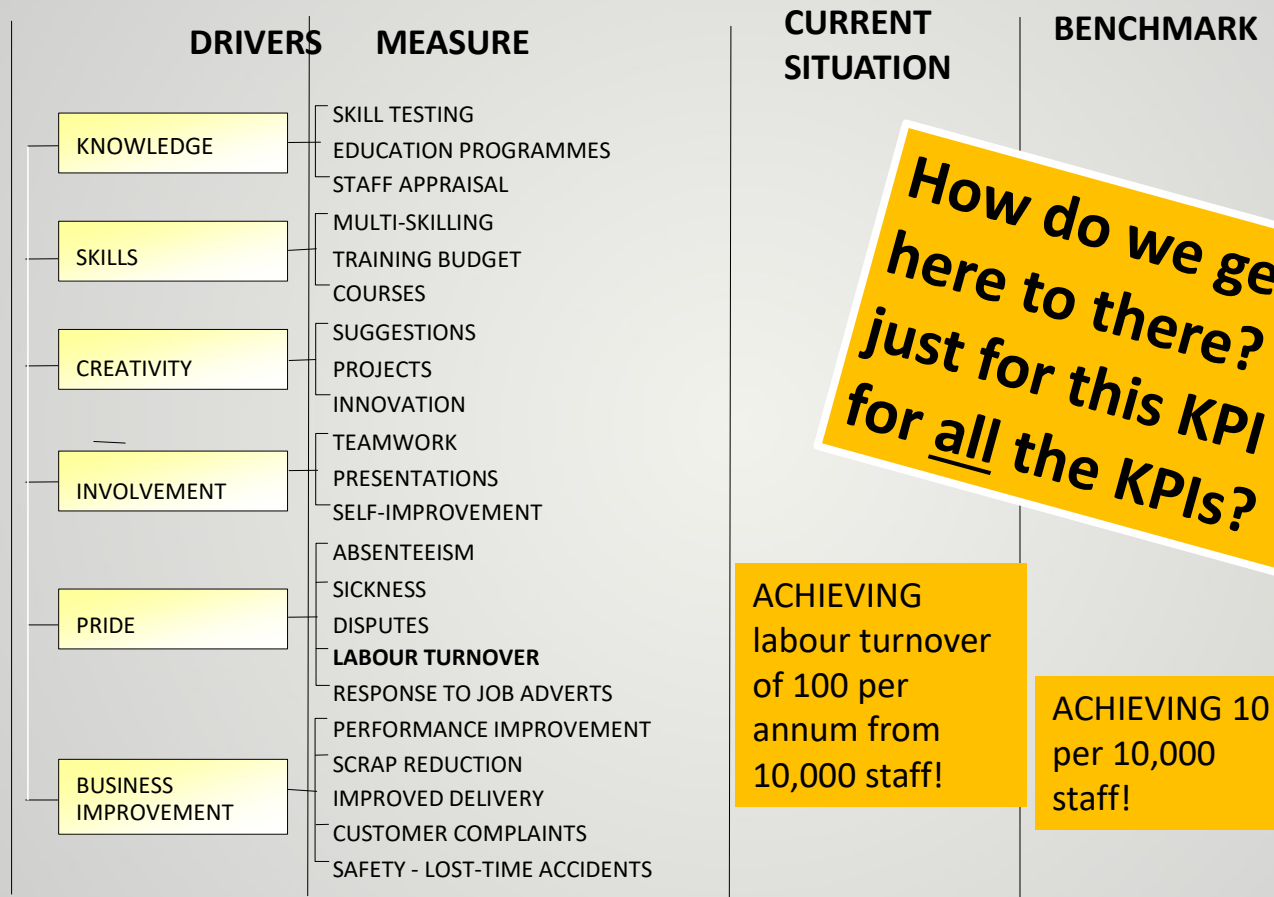
**So, we BENCHMARK and find organisations that are way better than us. In this case 10 from 10,000 staff per annum!**

# Key Performance Indicators

MISSION ELEMENT	DRIVERS	MEASURE	CURRENT SITUATION	BENCHMARK SOURCE	TARGET	
<p>Develop the <b>KNOWLEDGE</b>, <b>SKILLS</b> and <b>CREATIVITY</b> of our team to generate <b>INVOLVEMENT</b> and <b>PRIDE</b> as we continually <b>IMPROVE</b> our <b>BUSINESS</b>.</p>	KNOWLEDGE	<ul style="list-style-type: none"> <li>SKILL TESTING</li> <li>EDUCATION PROGRAMMES</li> <li>STAFF APPRAISAL</li> <li>MU...</li> </ul>		WORLD-CLASS COMPANIES UNIVERSITIES AND COLLEGES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES UNIVERSITIES AND COLLEGES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES LOCAL COMPANIES LOCAL COMPANIES LOCAL COMPANIES LOCAL COMPANIES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES WORLD-CLASS COMPANIES/ WORLD-CLASS COMPANIES/ TRADE ASSOCIATIONS WORLD-CLASS COMPANIES AND ROSPA ETC		
	SKILLS					
	CREATIVITY					
	INVOLVEMENT					
	PRIDE		<ul style="list-style-type: none"> <li>LABOUR...</li> <li>RESPONSE TO JOB ADVERTS</li> </ul>			
	BUSINESS IMPROVEMENT		<ul style="list-style-type: none"> <li>PERFORMANCE IMPROVEMENT</li> <li>SCRAP REDUCTION</li> <li>IMPROVED DELIVERY</li> <li>CUSTOMER COMPLAINTS</li> <li>SAFETY - LOST-TIME ACCIDENTS</li> </ul>			

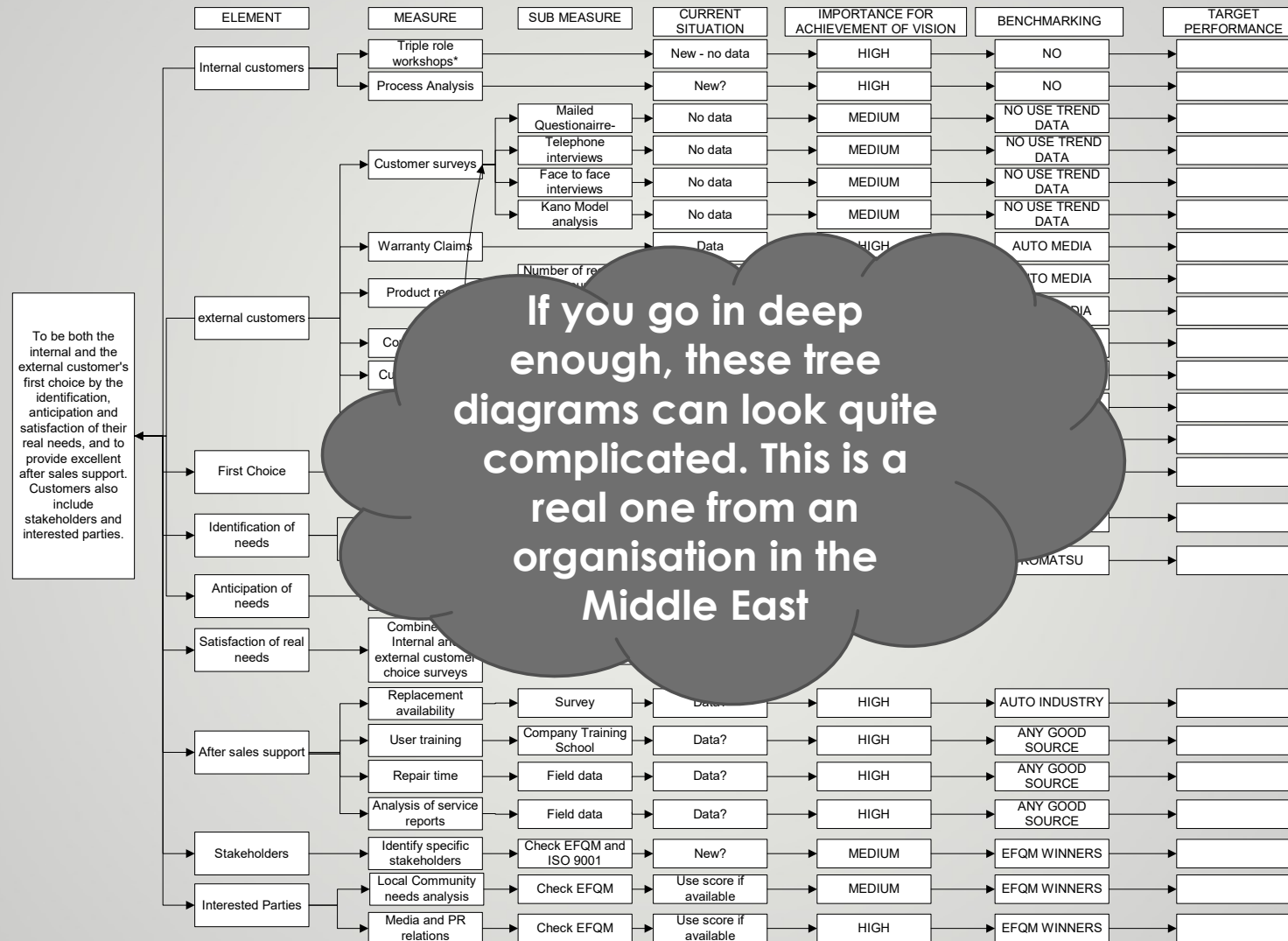
**We can create this column to try to decide where we might look to find the information that we need to know.**

# Key Performance Indicators – e.g. Employees



**How do we get from here to there? Not just for this KPI but for all the KPIs?**

# Key Performance Indicators



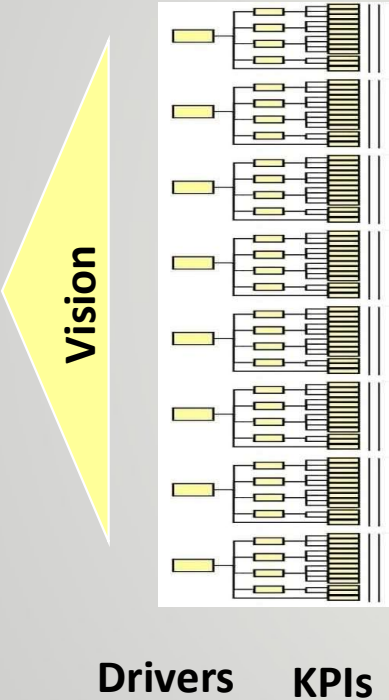
If you go in deep enough, these tree diagrams can look quite complicated. This is a real one from an organisation in the Middle East

To be both the internal and the external customer's first choice by the identification, anticipation and satisfaction of their real needs, and to provide excellent after sales support. Customers also include stakeholders and interested parties.



# **Responsibility for Tasks**

# The House of Quality



**We need to establish the Continuous Improvement process**




**Who is involved?**







**It depends on the KPI.**



# Managing the Improvement Process

Just taking that specific goal  
 'On Time delivery'  
 We can then assign  
 responsibilities by using the  
 following symbols.

-  Team Leader
-  Involved
-  Must be informed
- Blank – not involved

	Engineering Services	Sales	Planning and Production Control	Production	Transportation	Packaging	Customer Support
On time delivery							

# Managing the Improvement Process

If then a problem arises in this process, or it gets behind on its plan to achieve the KPI then a project team led by Planning and Production Control and involving personnel from Engineering Services, Production, Transportation and Packing would then use the Improvement process to solve the problem or to get back on track

	Engineering Services	Sales	Production Planning and Production control	Transportation	Packaging	Customer Support	Accounts
On time delivery	○		○ ●	○	○		▲

# Managing the Improvement Process

Departments in Company or functions in own department

	Engineering services	Sales	Planning and production control	Production	Transportation	Packaging	Customer support	Accounts
On time delivery	○	○	○	●	○	○	○	▲
Provision of Technical Services	●	○	○	○	○	○	○	○
Prompt handling of complaints	○	○	○	○	○	○	●	▲
Good quality (Physical Characteristics)	▲	○	○	●	○	○	○	○
Suitable Price	○	○	○	○	○	○	○	▲
Effective communication	●	○	○	○	○	○	○	○
Provision of consultation	●	▲	○	○	○	○	○	○
Packaging	○	○	○	○	○	○	○	○
Provision of credit	○	○	○	○	○	○	○	○

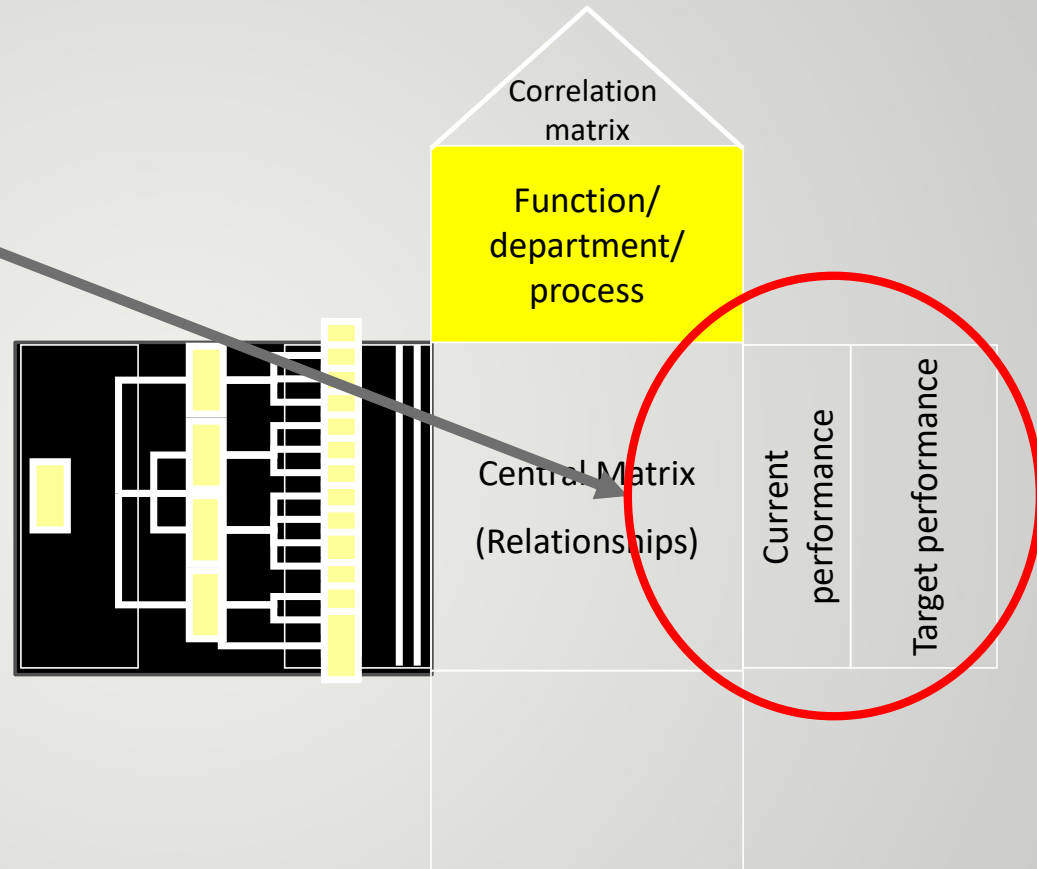
**When roles are designated for all KPIs the Chart will look like this**

Parameter	Target	Actual	Weight	Score
No of meetings	2	3	30%	1.00
No of consultation hrs	2	2	100%	1.00
Packaging standard	4	3.4	85%	0.85
Financial crediting	5	4	80%	0.80

# The House of Quality

Next Step...

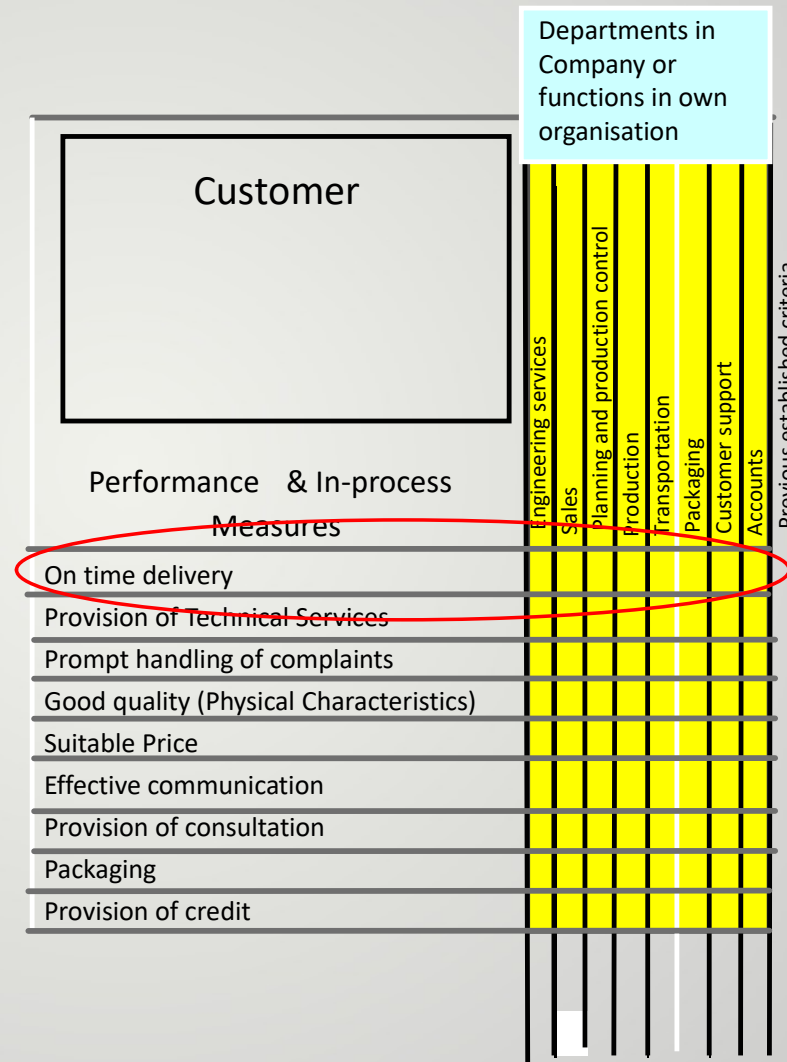
We then add on the right-hand side of the Matrix, the Data we have computed for Current and Target performance, but we also prioritise these in order of importance.



# Managing the Improvement Process

To illustrate this let us see how it works just for the first of our KPIs

‘On Time Delivery’.



# Managing the Improvement Process

Now let us take a look at the right-hand side of the chart. We can see that for each KPI on the left-hand side, the specific 'measure' is stated on the right

Departments in Company or functions in own department

	Engineering services	Sales	Planning and production control	Production	Transportation	Packaging	Customer support	Accounts	Measure	Importance of the parameter	Level of customer expectation	Actual level achieved by Mobarakeh	Ratio between expected and achieved
On time delivery	○	○	●	○	○	○	○	▲	Promises kept	5	85%	35%	0.41
Provision of Technical Services	●	○	○	○	○	○	○	○	Product application	2	100%	70%	0.70
Prompt handling of complaints	○	○	○	○	○	○	○	▲	No of days	4	80%	100%	1.25
Good quality (Physical Characteristics)	▲	○	○	●	○	○	○	○	The product standard	5	100%	55%	0.55
Suitable Price	○	○	○	○	○	○	○	▲	Market price band	4	100%	90%	0.90
Effective communication	●	○	○	▲	○	○	○	○	No of meetings	2	50%	50%	1.00
Provision of consultation	○	▲	○	▲	○	○	○	○	No of consultation hrs	2	100%	100%	1.00
Packaging	○	○	○	○	○	○	○	○	Packaging standard	4	100%	85%	0.85
Provision of credit	○	○	○	○	○	○	○	▲	Financial crediting	5	100%	80%	0.80

# Managing the Improvement Process

Now let us take a look at all the items on the right-hand side of the chart.

We can see that for each KPI on the left-hand side, the specific 'measure' is stated on the right

Departments in Company or functions in own department

	Engineering services	Sales	Planning and production control	Production	Transportation	Packaging	Customer support	Accounts	Measure	Importance of the parameter	Level of customer expectation	Actual level achieved by Mobarakeh	Ratio between expected and achieved
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Prompt handling of complaints	○	○	○	○	○	○	○	▲	No of days	4	80%	100%	1.25
Good quality (Physical Characteristics)	▲	○	○	●	○	○	○	○	The product standard	5	100%	55%	0.55
Suitable Price	○	○	○	○	○	○	○	●	Market price band	4	100%	90%	0.90
Effective communication	●	○	○	▲	○	○	○	○	No of meetings	2	50%	50%	1.00
Provision of consultation	●	▲	○	▲	○	○	○	○	No of consultation hours	2	100%	100%	1.00
Packaging	○	○	○	○	○	●	○	○	Packaging standard	4	100%	85%	0.85
Provision of credit	○	○	○	○	○	○	▲	●	Financial crediting	5	100%	80%	0.80

# Managing the Improvement Process

To the right of that follows a column stating the importance of the parameter, then level of customer expectations, the current level achieved and finally the ratio between the expected or desired value and the achieved value.

In this example, it was the policy of the company that every time the ratio fell below 80% for a Level 5 Priority item it automatically triggered an improvement project.

Departments in Company or functions in own department

Engineering services	Sales	Planning and production control	Production	Transportation	Packaging	Customer support	Accounts	Measure	Importance of the parameter	Level of customer expectation	Actual level achieved by Mobarakeh	Ratio between expected and achieved
○	○	○	●	○	○	○	▲	Promises kept	5	85%	35%	0.41
●	○	○	○	○	○	○	○	Product application	2	100%	70%	0.70
○	○	○	○	○	○	○	▲	No of days	4	80%	100%	1.25
▲	○	○	●	○	○	○	○	The product standard	5	100%	55%	0.55
○	○	○	○	○	○	○	▲	Market price band	4	100%	90%	0.90
●	○	○	▲	○	○	○	○	No of meetings	2	50%	50%	1.00
●	▲	▲	○	○	○	○	○	No of consultation hrs	2	100%	100%	1.00
○	○	○	○	○	●	○	○	Packaging standard	4	100%	85%	0.85
○	○	○	○	○	○	○	▲	Financial crediting	5	100%	80%	0.80



# Exercise



Determine  
Responsibility | Benchmark | Targets



# Almost there...





# SESSION 6

## BUSINESS PROCESS IMPROVEMENT

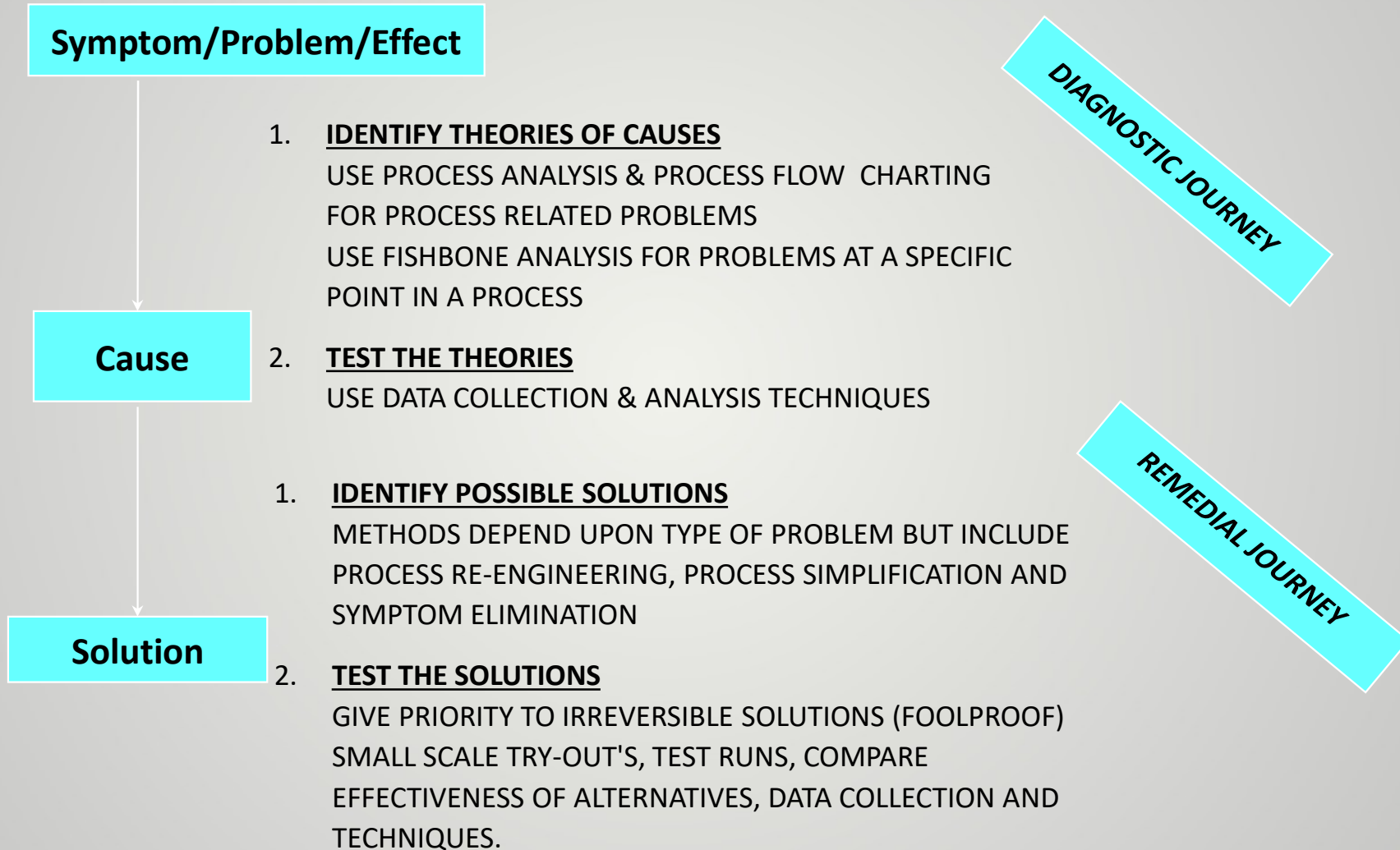
- WITH PRACTICAL

# PROBLEM-SOLVING SKILLS



# **Problem Identification**

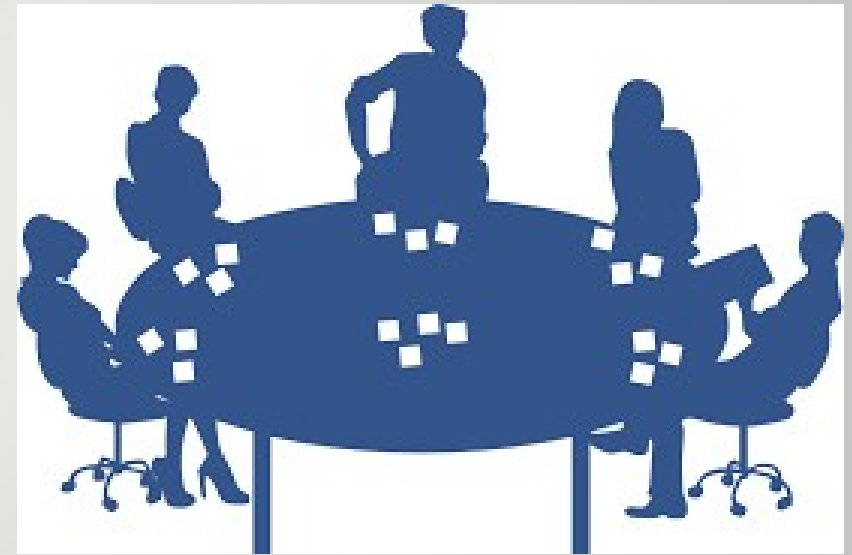
# A Typical Improvement Process



# Problem Identification

From the premise that we have our KPI, we need to think of the problems that are currently our Achilles heel

So, we will determine this through a brainstorming session using the Round Robin style



# Problem Solving – Cause(s)

## Cause

To find the cause, we need to identify theories of causes. This is where we nearly always go wrong, and we set ourselves a trap!

The bait in the trap is the fact that we want results NOW; so, we take short cuts.

No sooner do we identify one or two possible causes than we jump to looking.



# Problem Solving – Remedies

## Remedies

But hold on... we only have theories of causes. We do not really know if they are the REAL causes, however obvious it might seem.



# Problem Solving – Cause(s)/Remedies

You would not believe how many times we fall into this trap.

If we slow down and are not so impetuous, guess what; we will often find dozens more possible causes and they might be well away from where you think!

What is more, although our first guess might have been just one of the culprits, when we look deeper, we may find that not only was it just a minor contributory cause, but the main culprit could easily be something that we had hardly thought of.

**Problem –**  
Late delivery

**Believed cause –**  
Muddled up source of data

**True cause –**  
Poor Scheduling

Until the study, everyone had blamed the setters!



# Problem Identification

To be a 'Problem' the test is that it must be both **undesirable or nasty** *and* you must be able to count the number of times it happens or measure it in some way.

Think about it. **If you cannot count it or observe it happening, you will have no evidence to show that you have solved it** or by how much things may have been improved.

How will you prove it to anybody and who will believe you?



# Problem Identification

Which of the following do you think are problems?

Poor Training

Poor Communications

Machine speed too low

Pressure too high

Lazy workers

Poor management

# Problem Identification

The answer is actually... none of them!

They are all causes.

But causes of what?

For example, 'poor training' could apply to almost anything and unless we are specific as to what it is that we think that poor training is a possible cause of, we are stuck and 'poor training' is only one of a number of possible causes.

The same applies to all the others.

**Remember – you cannot solve a cause!**



# Problem Identification

Sometimes, you might be able to prefix the 'problem' with the words 'we need' for example...

We need

New software

Faster internet

A faster machine

Better temperature control

Better planning

If you can do that, then again, these are not 'problems' either, they are possible solutions but solutions to what?

They are, however, pointers to what are the real problems.

# A Focus on Root Cause Analysis (RCA)





# *TPN – Selecting the Problem from Brainstorming*

Review each Project Nomination to:

Clarify understanding where necessary, re-title the project nomination where appropriate.

Assess the extent to which these problems (opportunities for improvement) are group controllable.

Code:

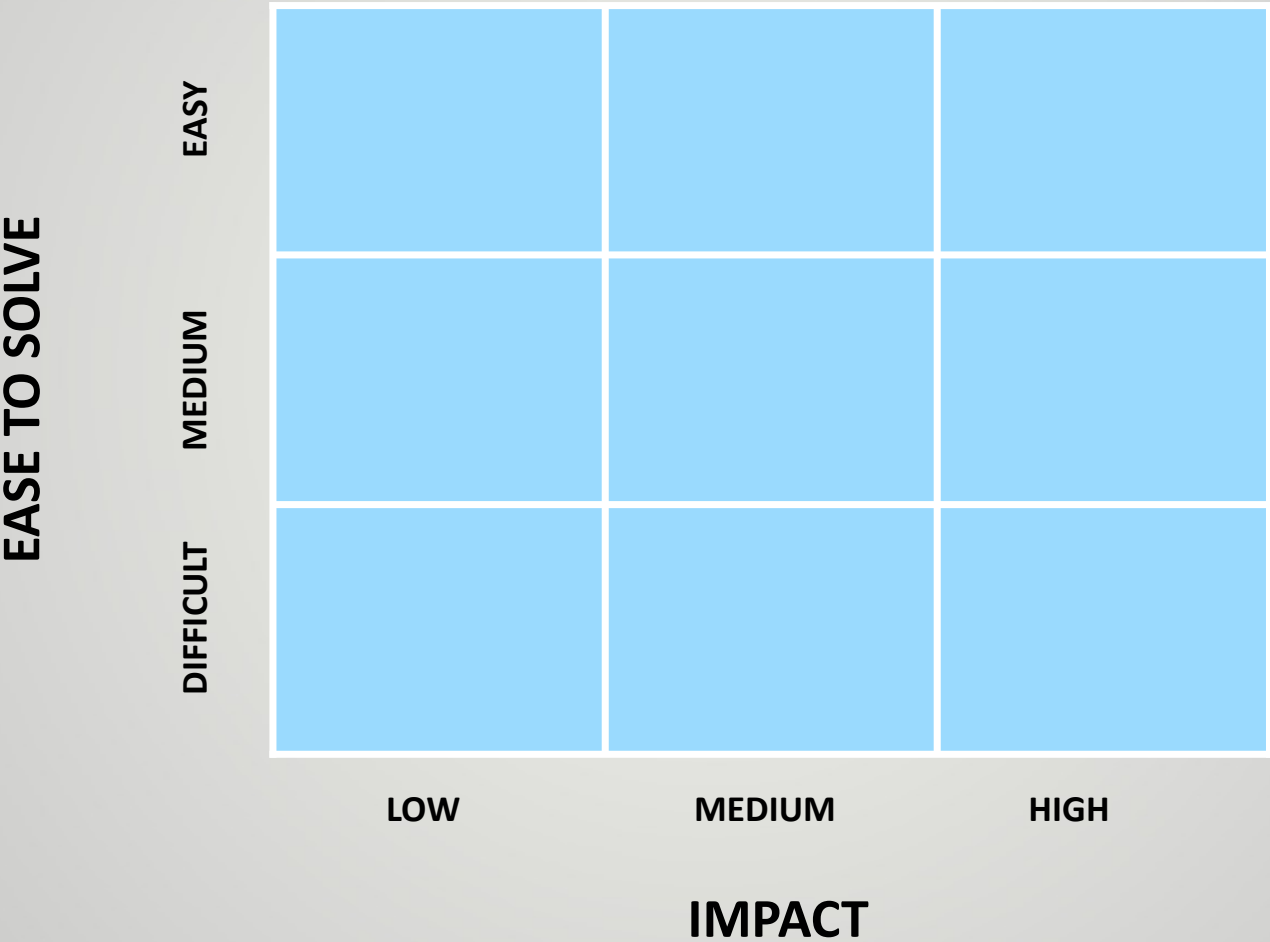
**T** – Totally group controllable

**P** – Partially group controllable

**N** – Non-group controllable

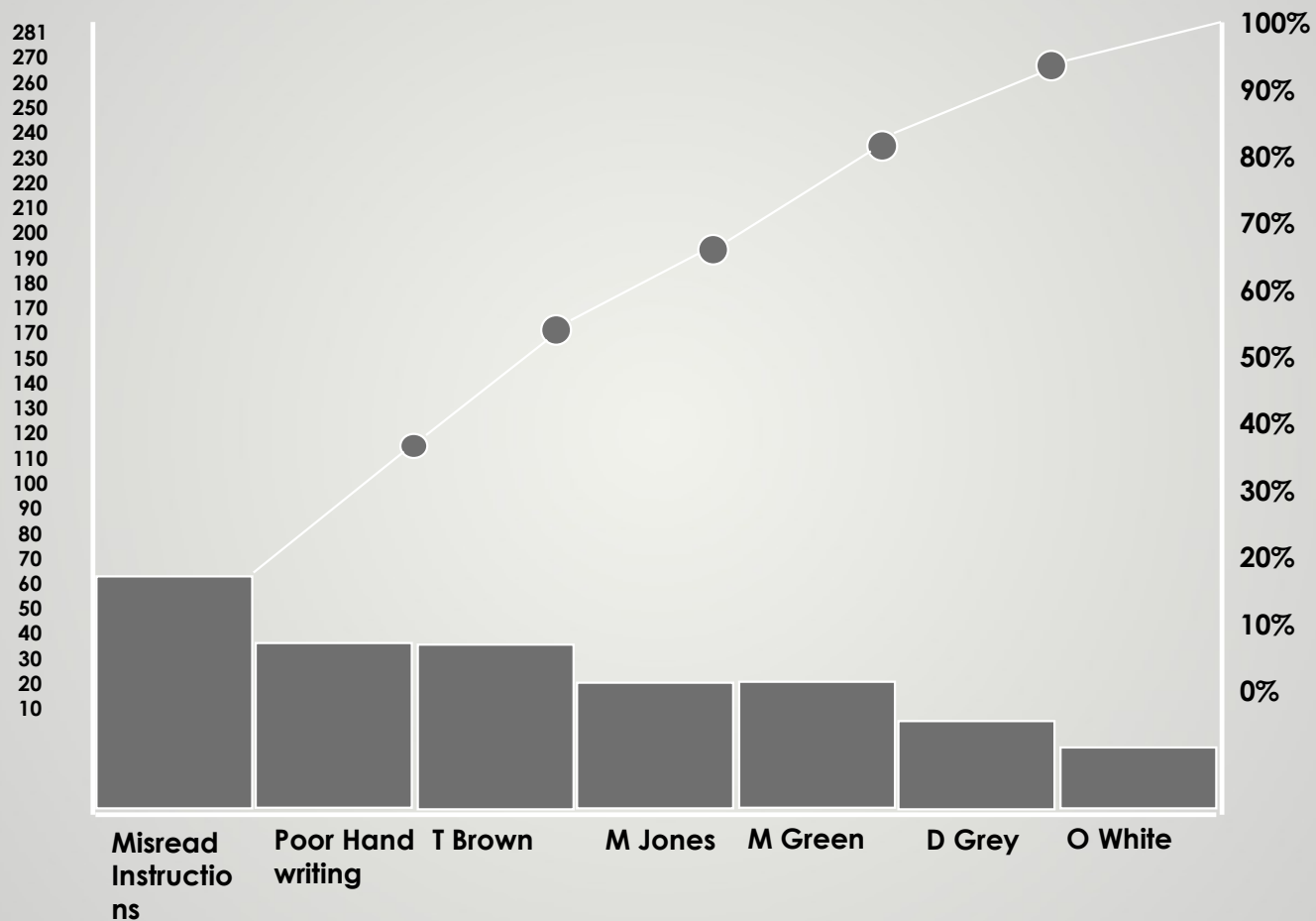


# Project Prioritisation





# Pareto Analysis





Project or Problem/Symptom/Effect



Theories of causes

Testing the theories

True Causes

# 5 WHYS

## How do you use the 5 Whys?

- By repeatedly asking the question “Why” (five is a good rule of thumb), you can peel away the layers of symptoms which are disguising the *root cause*(s) of a problem



## What are the benefits of using 5 Why?

- Help identify the *root cause* of a problem
- Determine the relationship between different root causes of a problem
- One of the simplest tools – easy to complete without statistical analysis

## When Is 5 Whys Most Useful?

- When problems involve human factors or interactions



5 Whys

# Examples of 5 WHY's

## BUSINESS

Why are our sales down?

- Nobody's buying our product

Why is nobody buying?

- Because our delivery has a poor reputation

Why do we have a poor reputation?

- Because we are always late

Why are we always late?

- Because we do not have enough trucks

Why do we have too few trucks?

- Because we underestimated demand for our product

## TECHNICAL

Why is there water on the floor?

- Because a pipe in the roof split

Why did it split?

- Because the water in it froze

Why did the water freeze?

- Because the pipe is near an air vent and sometimes cold air blows over that section

Why was the pipe routed there?

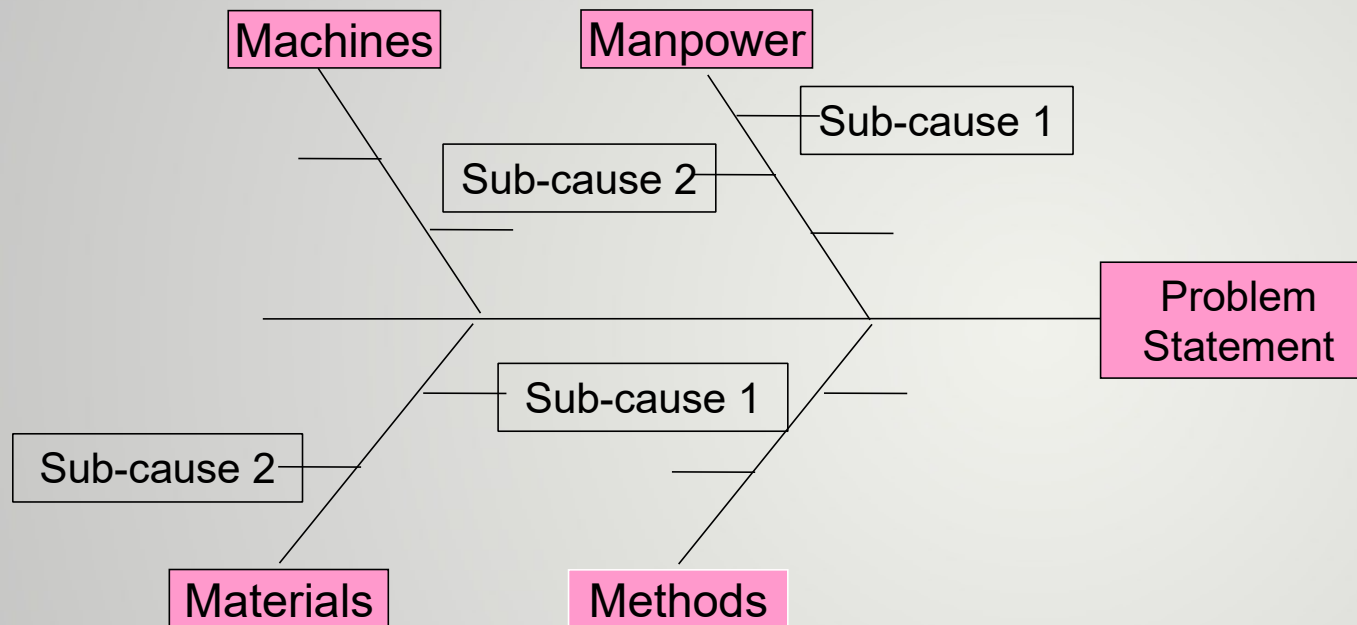
- The installers did not check for potential drafts

Why did they not check?

- Because their training did not include this

# Fishbone (Ishikawa) Diagram

*This is a powerful tool used to identify, record and visually represent the possible causes of a problem*

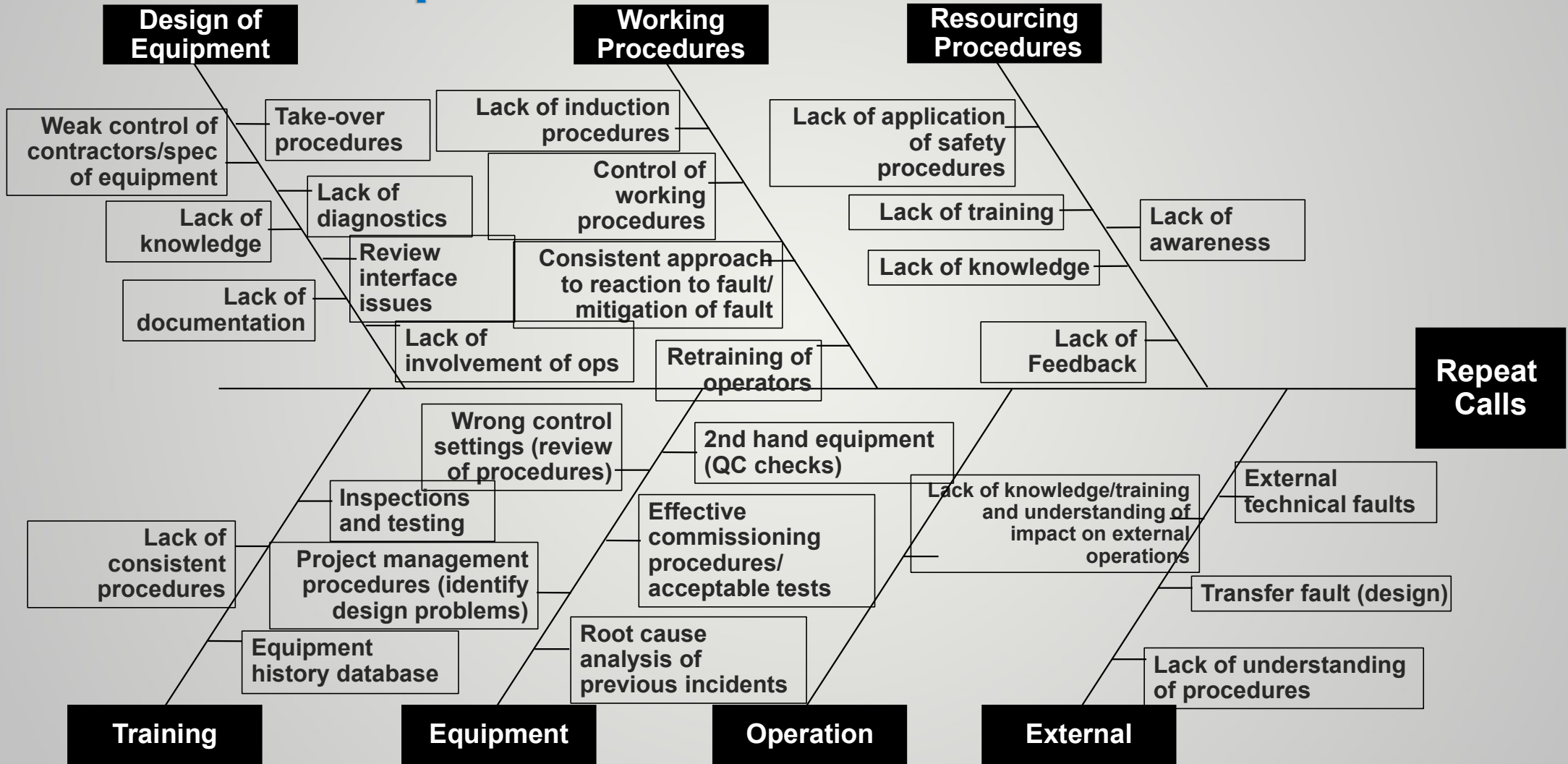


Develop initially as a small project team, but then develop it further and validate the causes with input from key operational people – using for example, the 5 whys technique

*Fishbone digs down to the real problem. It breaks down what can appear to be an impossible issue, into smaller, more easily handled chunks.*

*The Fishbone can also be used to test or arrive at a solution*

# A 'Cause and Effect' Diagram to Probe Root Causes of Repeat Calls to a Utilities Call Centre





# **Business Process Modelling**



# What is a Business Process?

**The means by which an organisation carries out its internal operations and delivers its products and services to its customers.**

A series of tasks performed by actors of an organisation, triggered in response to a business event that transform inputs from suppliers into output of value for a customer in order to achieve business objectives.



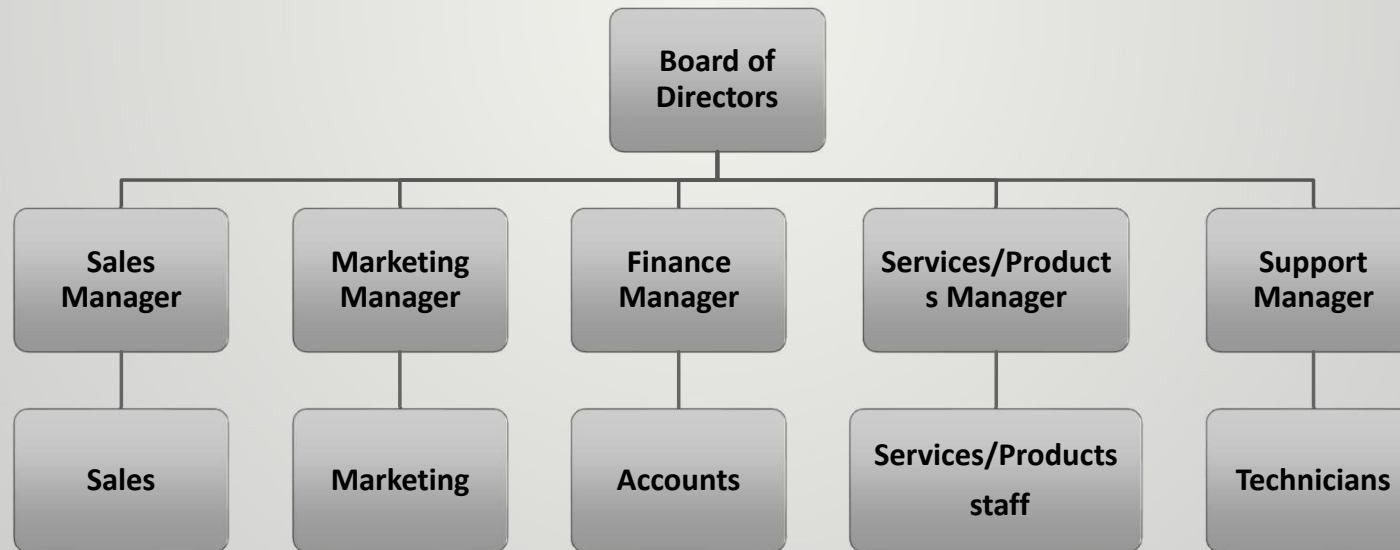
# What is Business Process Modelling?

**The activity of presenting processes so that they may be analysed and improved.**

- Abstraction or Simplification
  - Confirm and communicate understanding
- This can be by staff within their business areas
  - To improve the process or business
- Allows those involved to;
  - Develop an understanding of the business
  - analyse activities
  - identify possible improvements

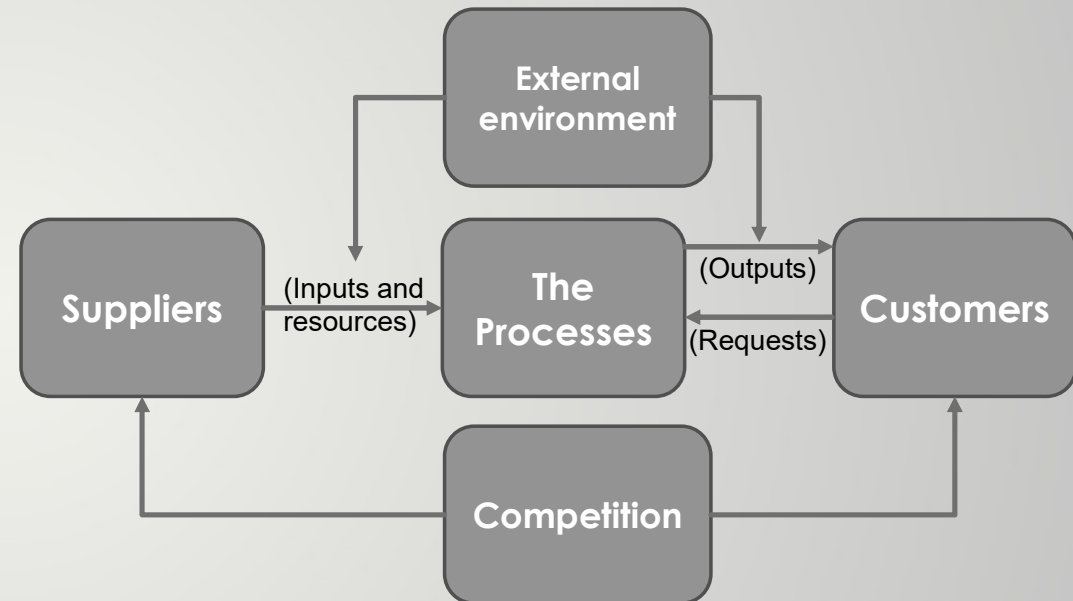
# Functional View of an Organisation

- Traditional view based on specialist functional areas
  - Marketing, Sales, HR, Accounts, Operations, etc.
  - Required to perform business activities

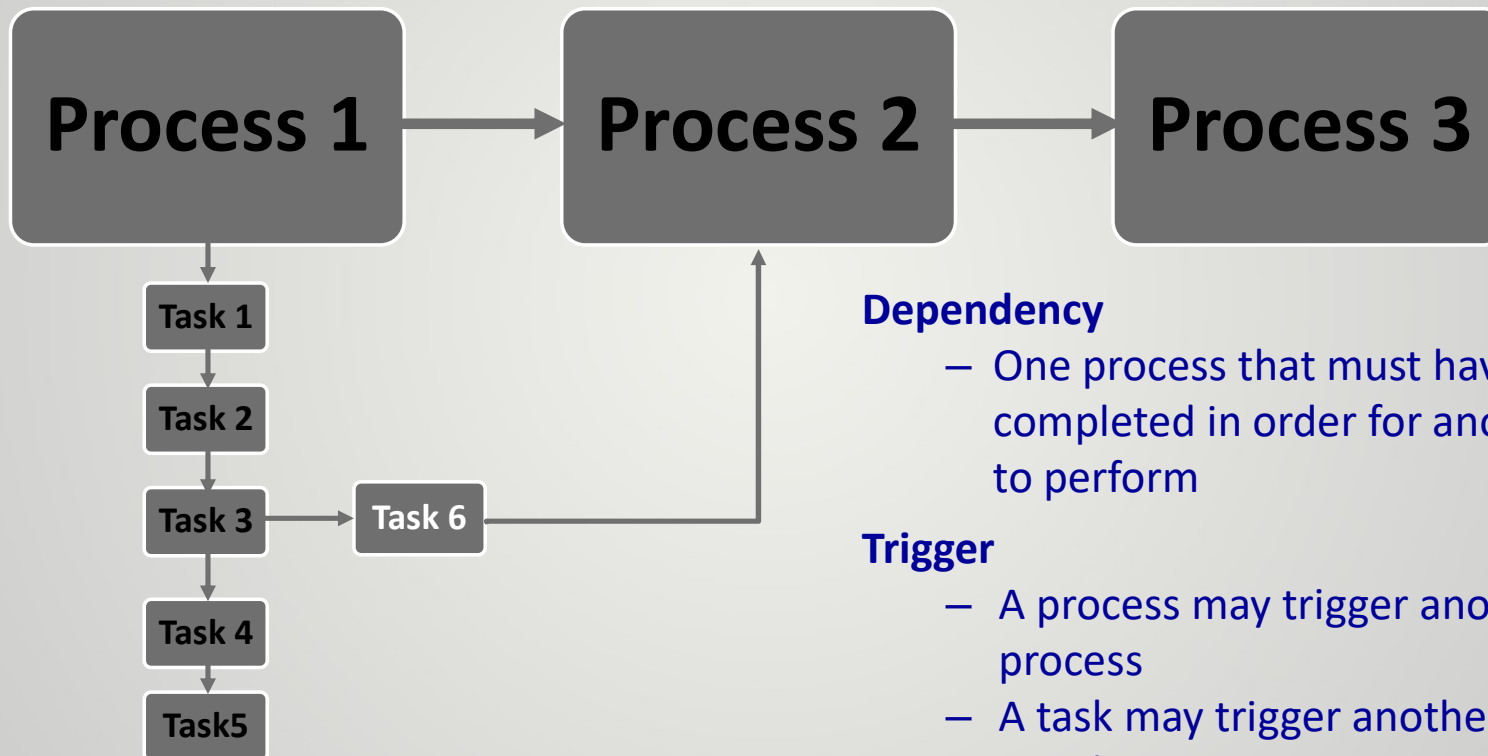


# Process View

- A business process will span functions
  - Needs to communicate and interface across functions
- Shows (end to end) response to business events
- Supports delivery of value to customer
- Supporting goals and strategy
- Both functional and process views are important



# Relationships Between Processes



## Dependency

- One process that must have completed in order for another to perform

## Trigger

- A process may trigger another process
- A task may trigger another task
- A task may trigger a process

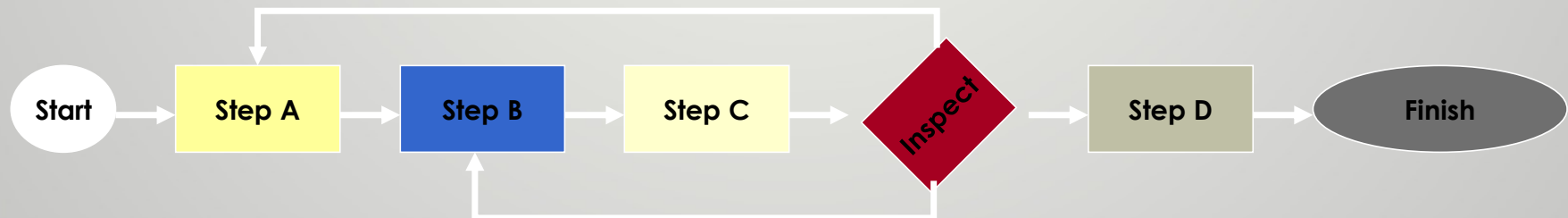
# Process Maps

## Types of Process Maps

- High level process map
- Detailed process map
  - Swim Lane process map
- Value Stream Map

### Key Points:

- ❖ A way of illustrating the flow of a process
- ❖ Describes how the flow works and identifies the complexities therein
- ❖ The *Process Map* forms the basis of a Value Stream Map
- ❖ The *Process Map* communicates the focus of problem solving





# Advantages of Visual Mapping

Provides a  
**VISUAL**  
representation  
of the process

Mapping out the  
actual process  
enables an  
objective view  
of reality

Identifies re-  
work loops and  
redundancies

Serves as a  
training and  
orientation tool

Identifies non-  
value added  
steps

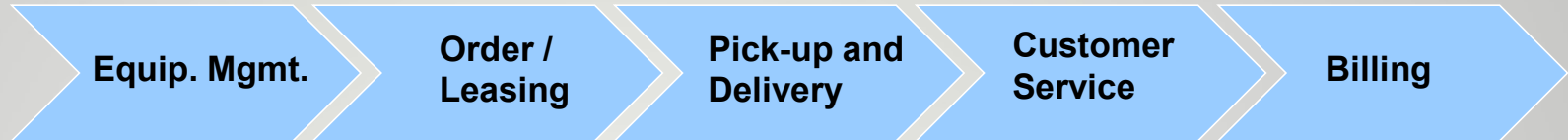
Helps identify  
where, in the  
process, data can  
be collected from

Identifies where  
different work  
teams use different  
processes

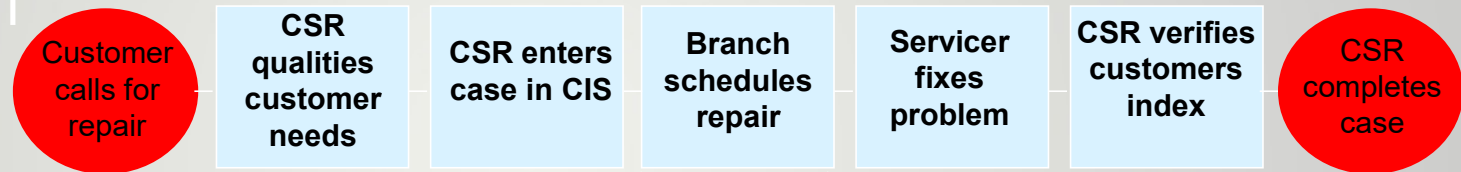
**Process Maps form the basis of Value Stream Maps**

# Example Process Map

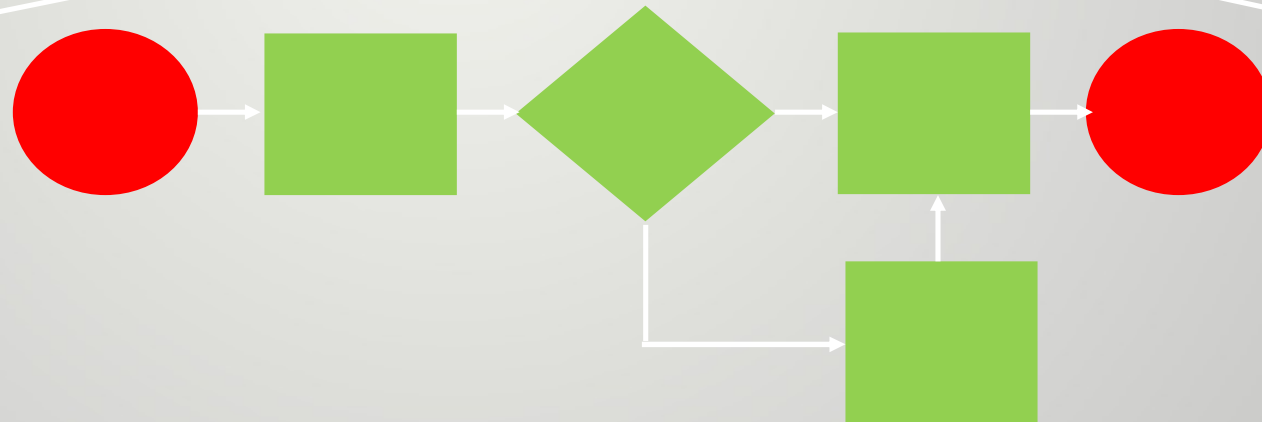
Core process  
(level 1) SIPOC



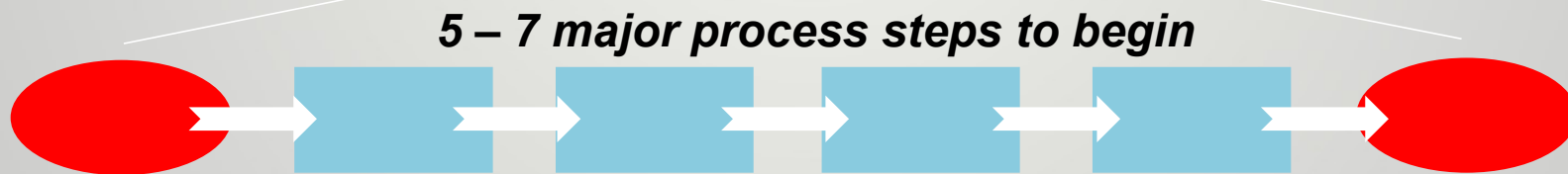
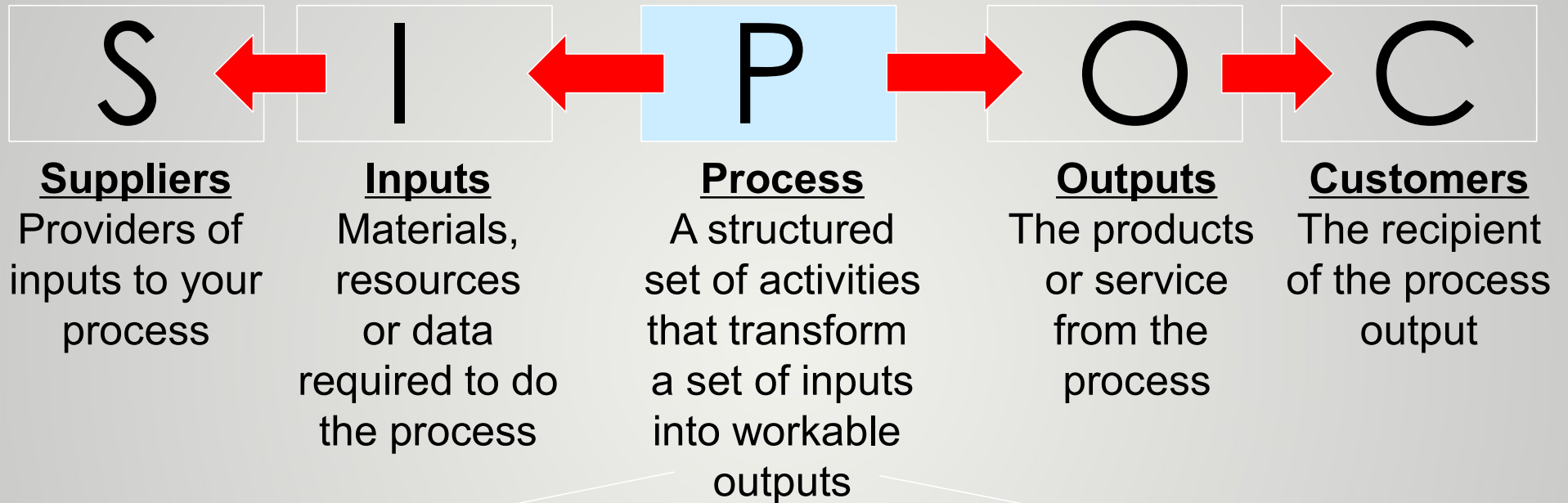
Sub-processes  
(level 2)



Sub-processes through  
micro-processes  
(level 3)



# Example: SIPOC



**S.I.P.O.C is used to identify high level AS-IS processes – an effective communication tool**



# Process Stapling

Following a process through 'end-to-end'

Record everything that happens

- Even the unexpected and one-offs

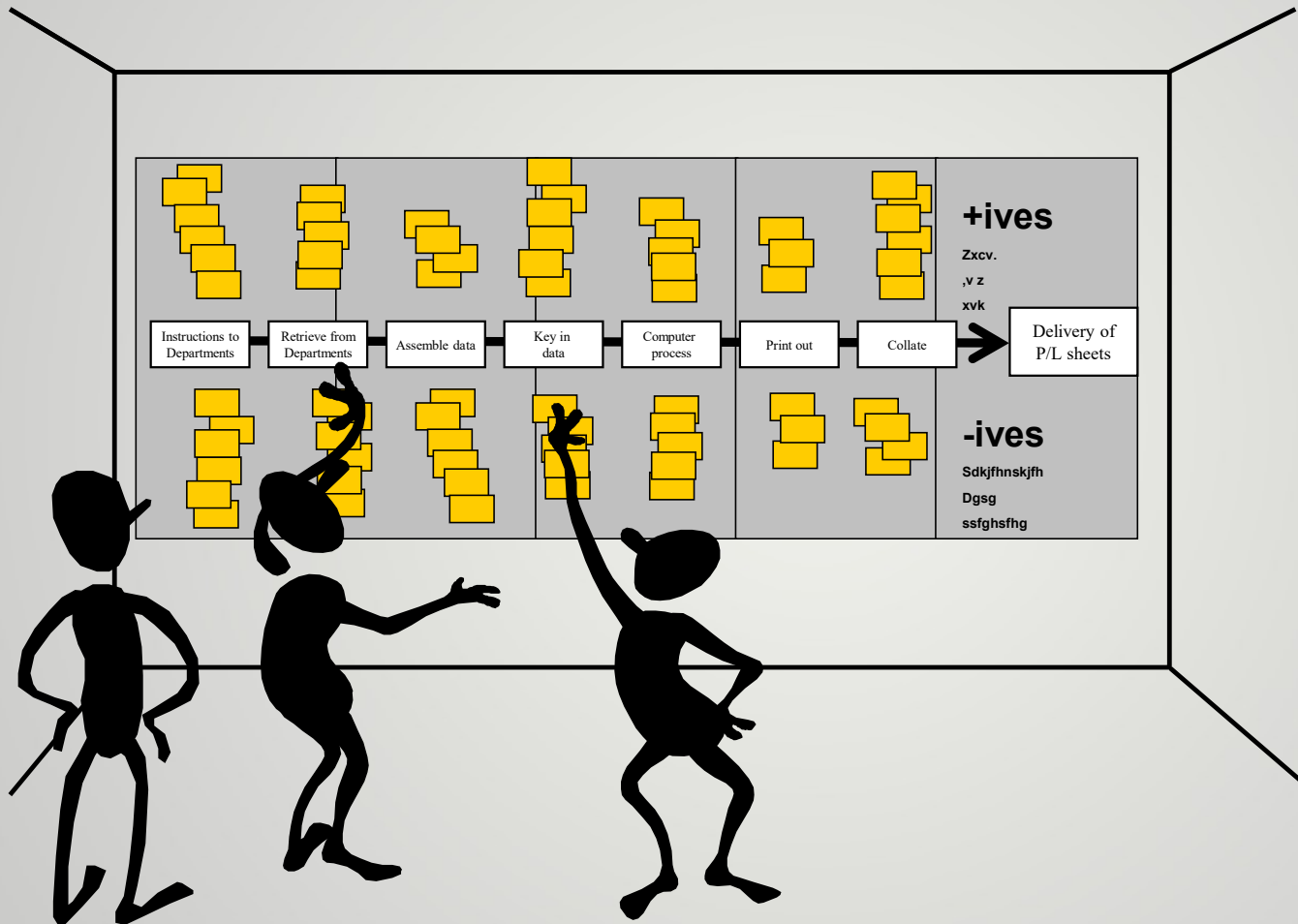
Video is useful

Make sure this does not have a negative effect on the people in the process

- Make sure they know it is not about testing them
- Possible have staff do the recording

***Some people prefer to work through a process backwards***

# Process Mapping



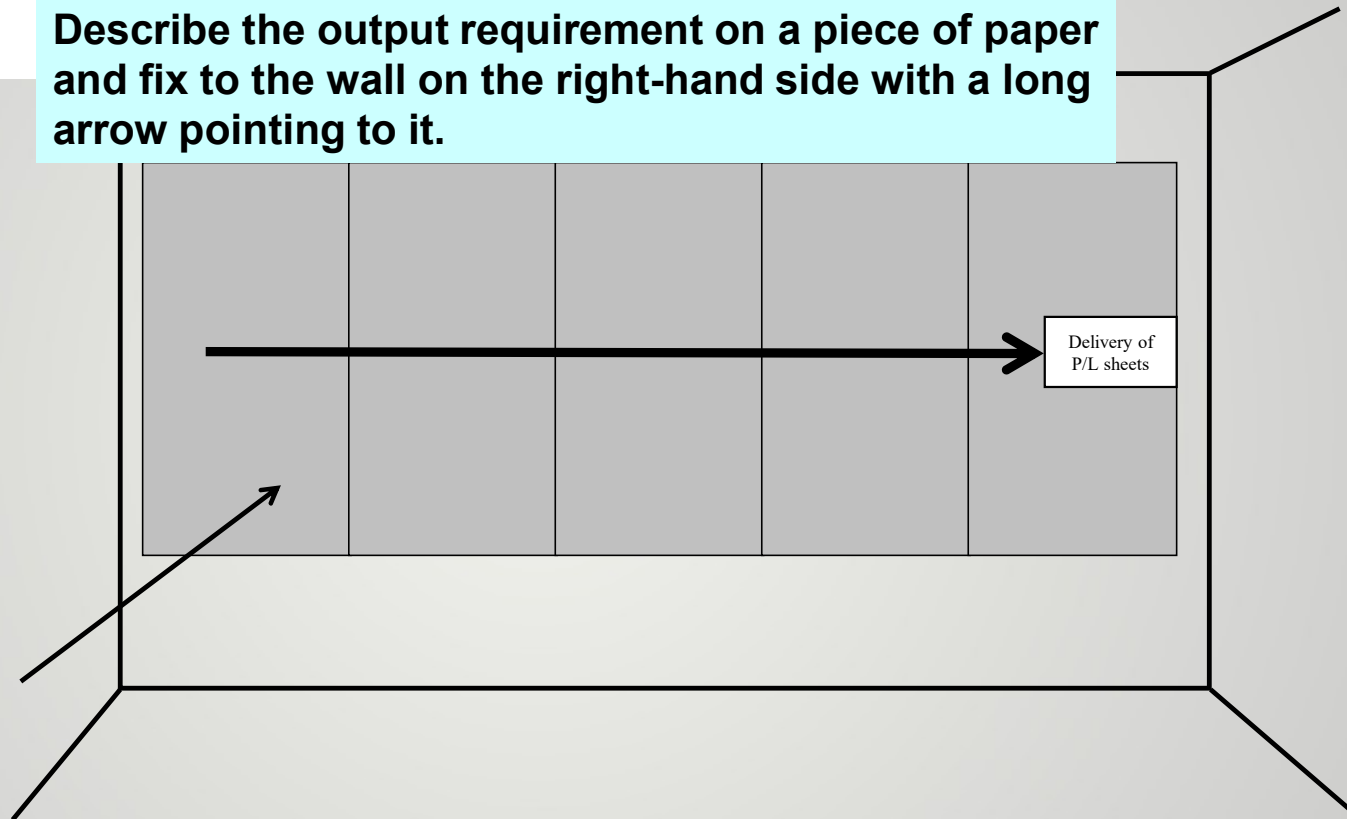
A sequential series of activities that eventually result in the relevant output

# Process Mapping

## Step 1.

Describe the output requirement on a piece of paper and fix to the wall on the right-hand side with a long arrow pointing to it.

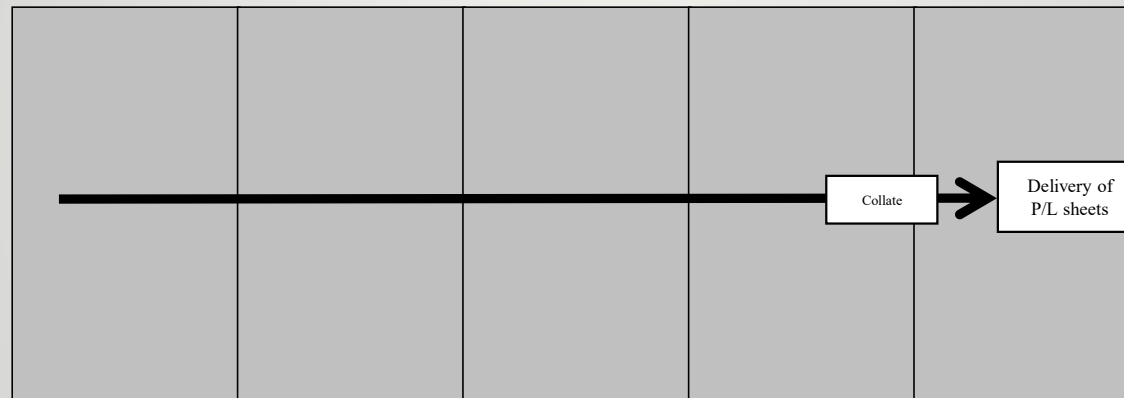
Flip Chart sheets



# Process Mapping

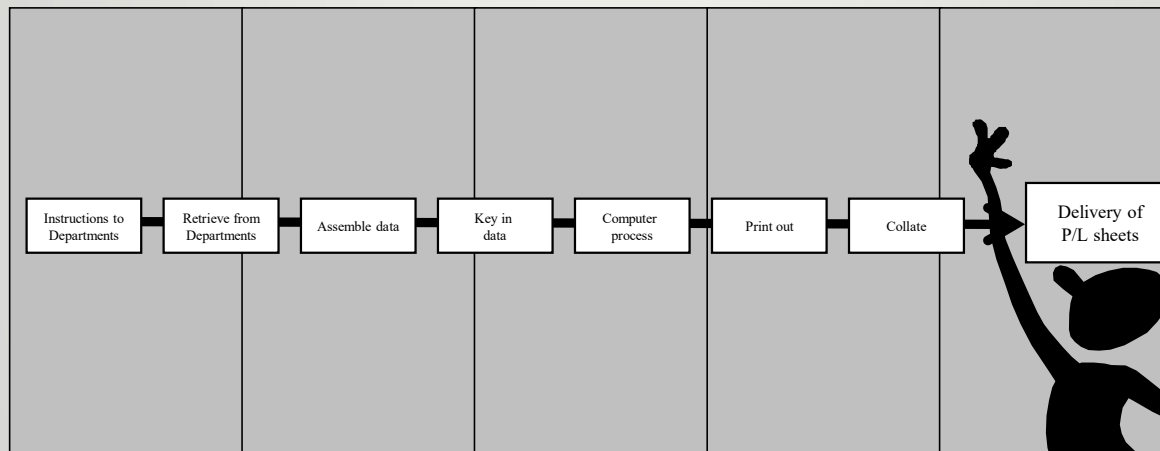
## Step 2.

Then, identify each key process element from the final activity in the process asking the question for each 'what is the next element and placing it on the arrow as shown and to the left of the previous one.

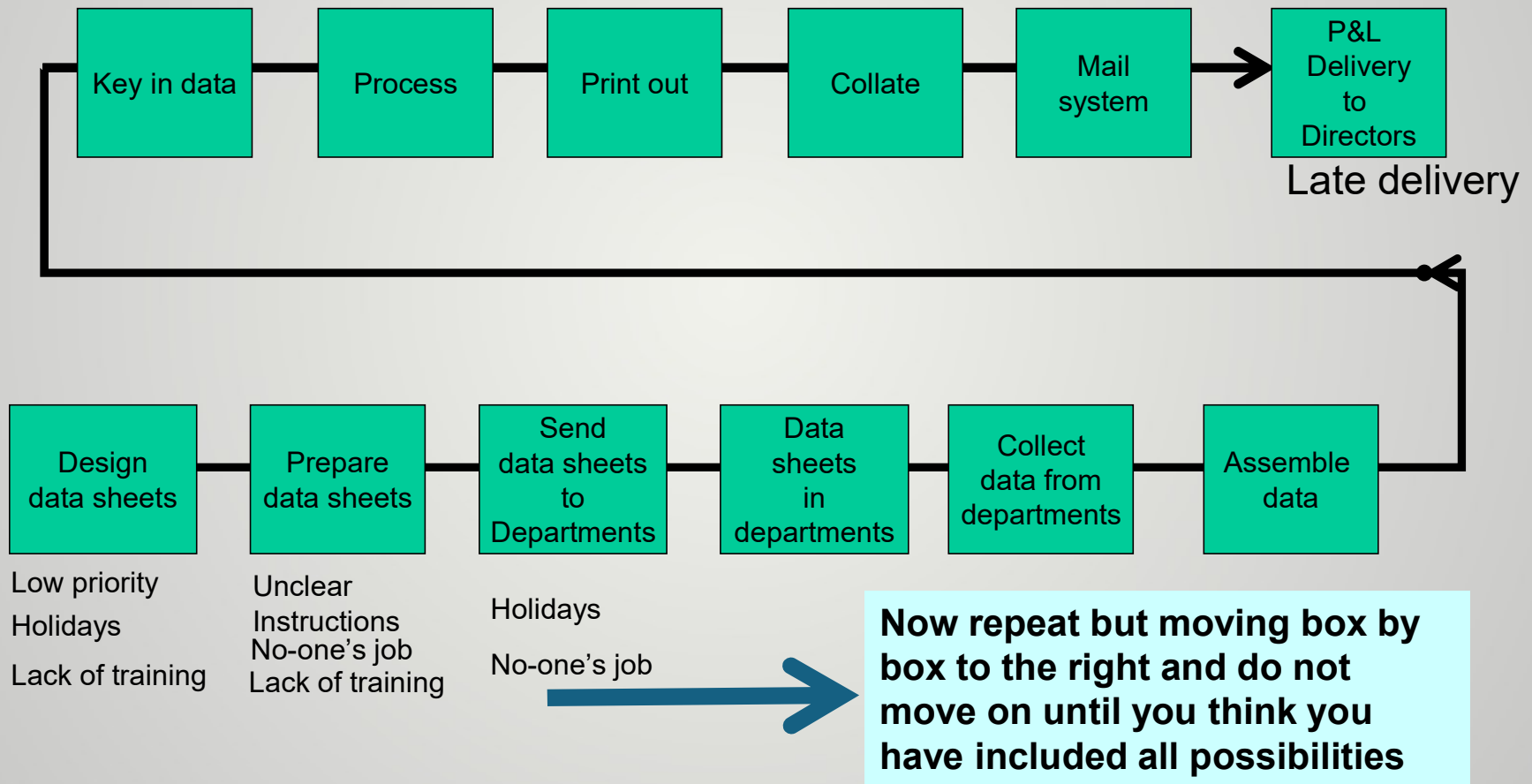


# Process Mapping

From the end point, identify all process elements right back to when you can go no further

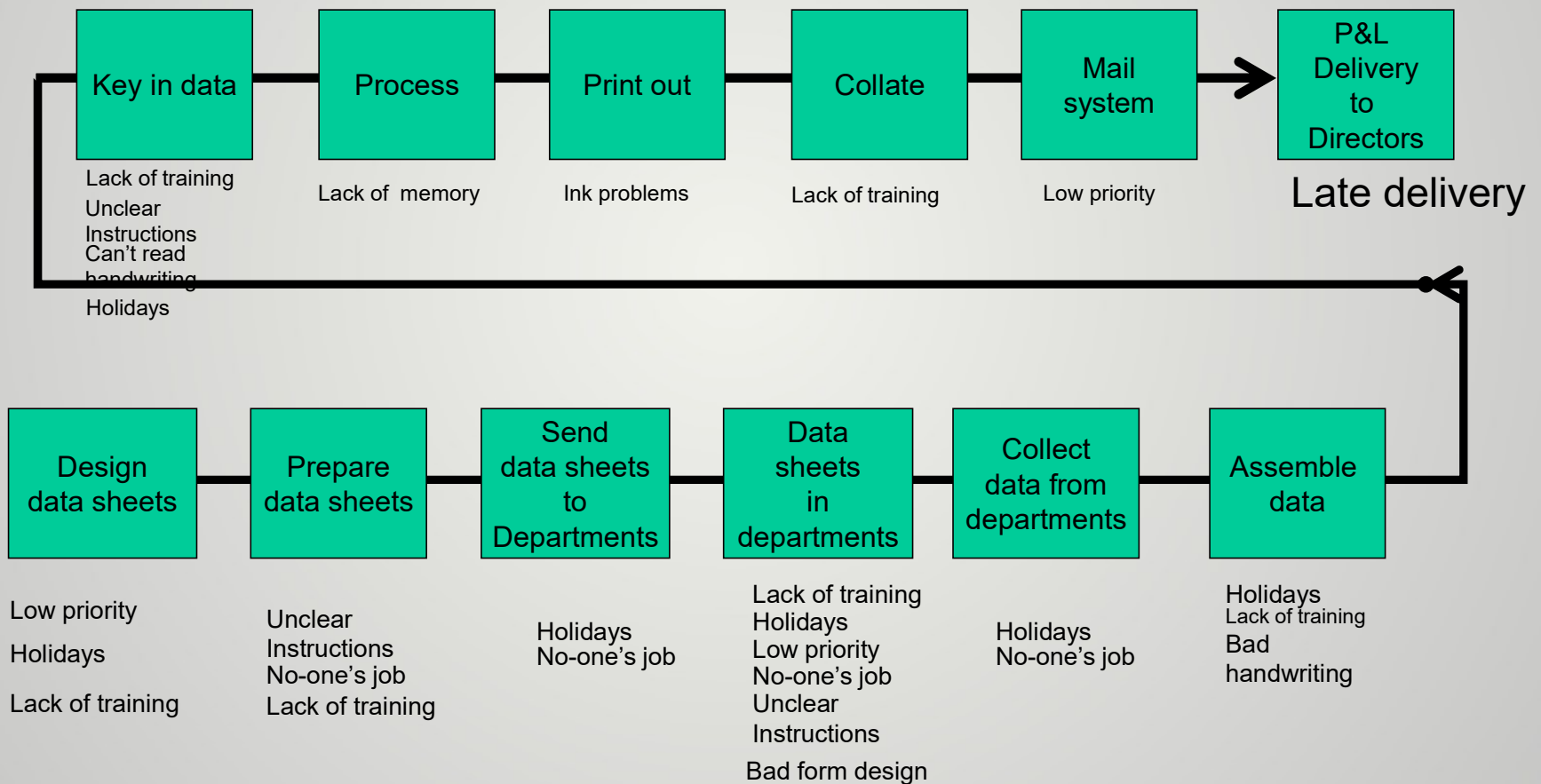


# Late Delivery



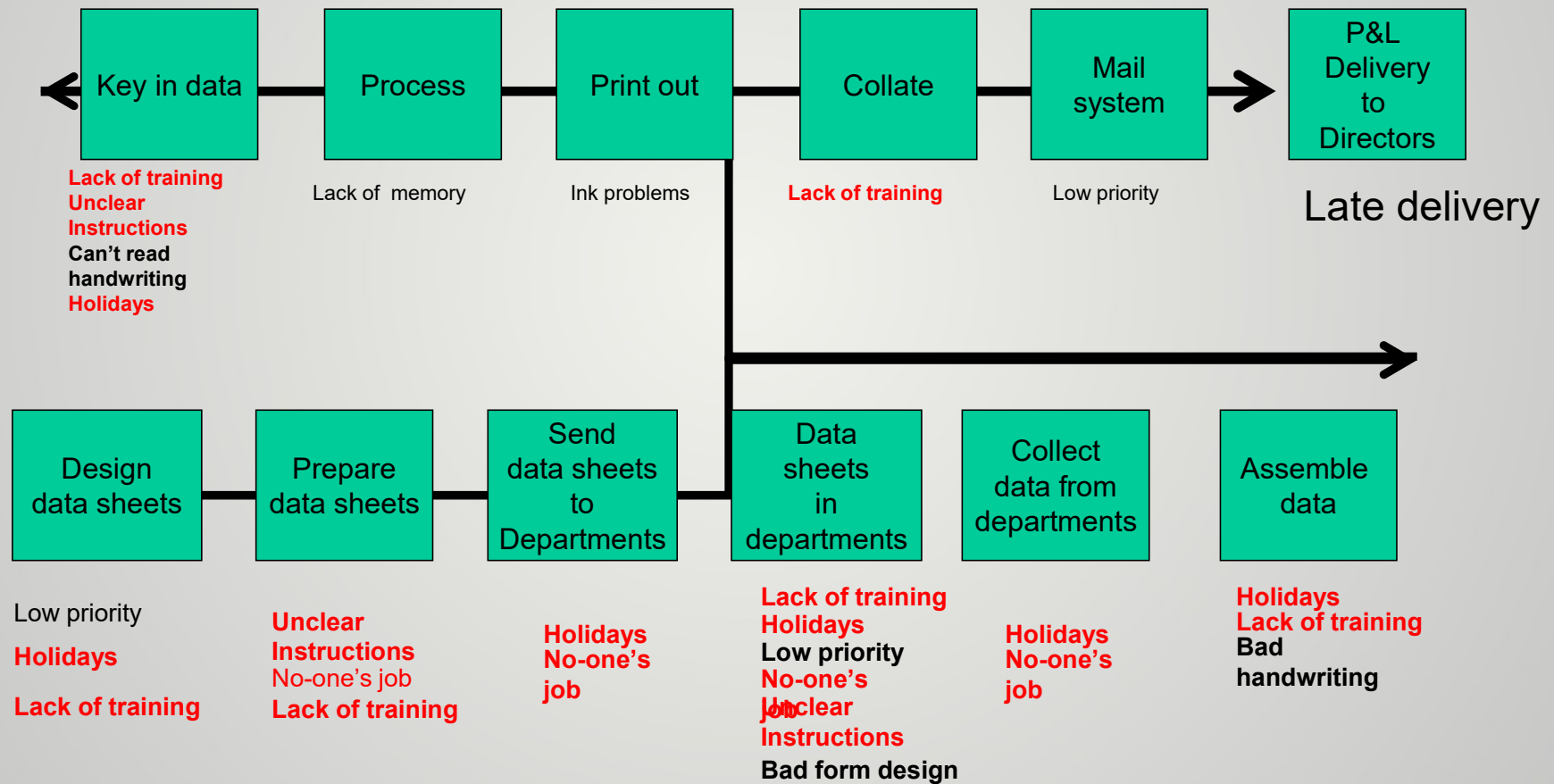
# Late Delivery

On completion, the chart will look something like this



# Late Delivery

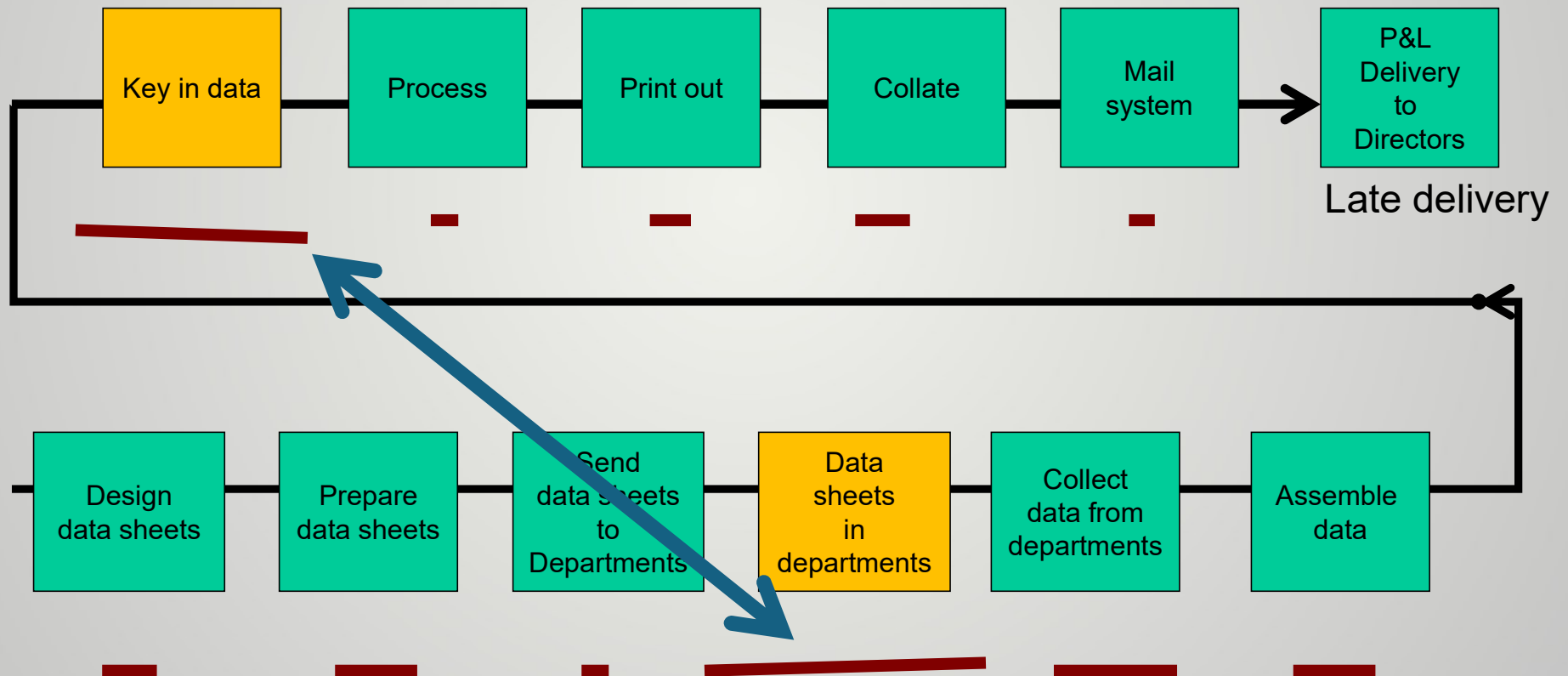
Notice the repeats – Holidays and Lack of Training come up 6 times each. No-one's job 3 times, Unclear instruction 3 times.



# Late Delivery

Time variation 

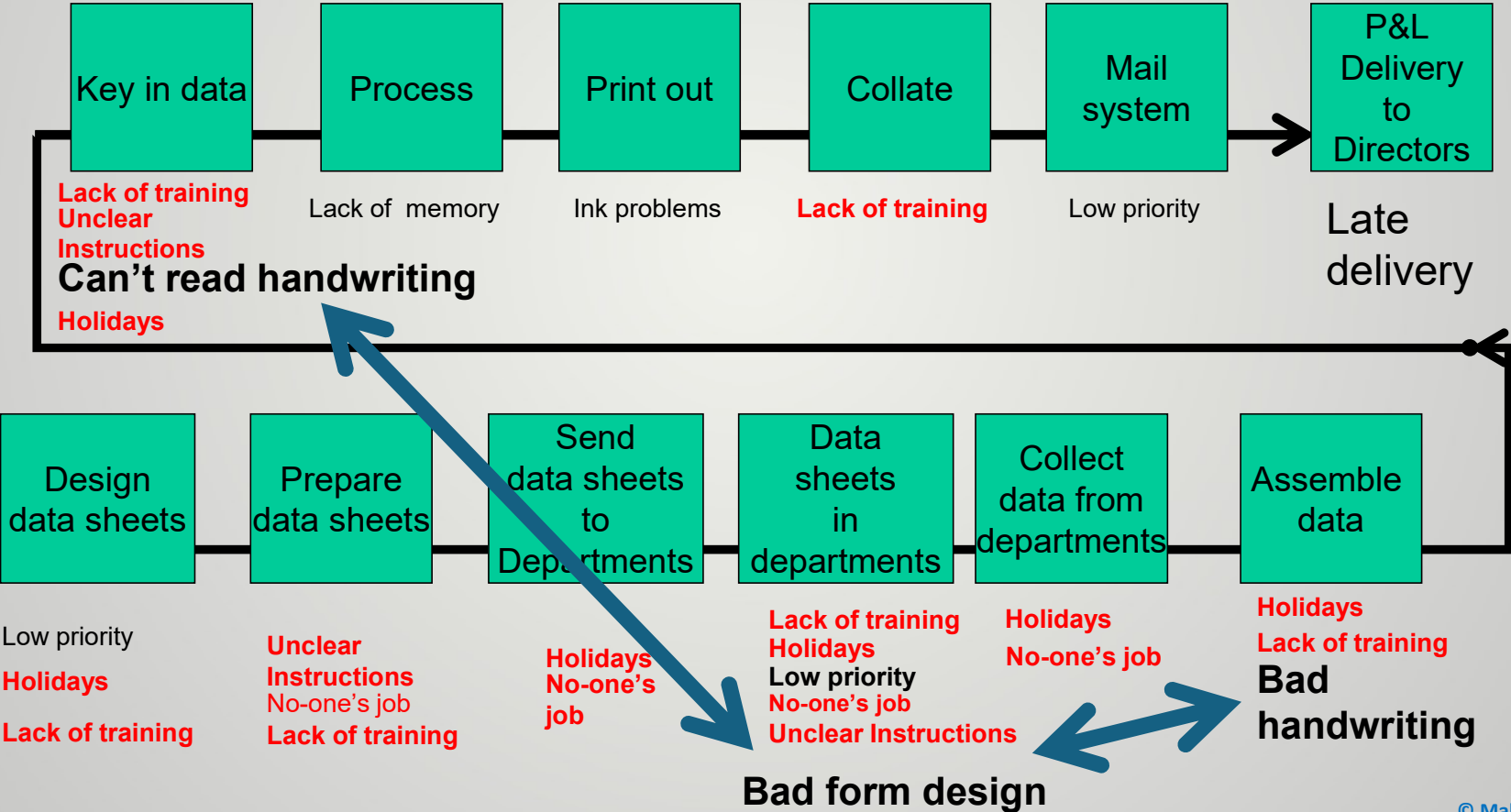
Notice the variation in Time! The time in both of these is much longer than in the others? Why?



# Late Delivery

A study shows a link between the reasons

'Bad Form Design' combined with 'Bad Handwriting' and 'Can't read the handwriting' seem like they could be the key problems



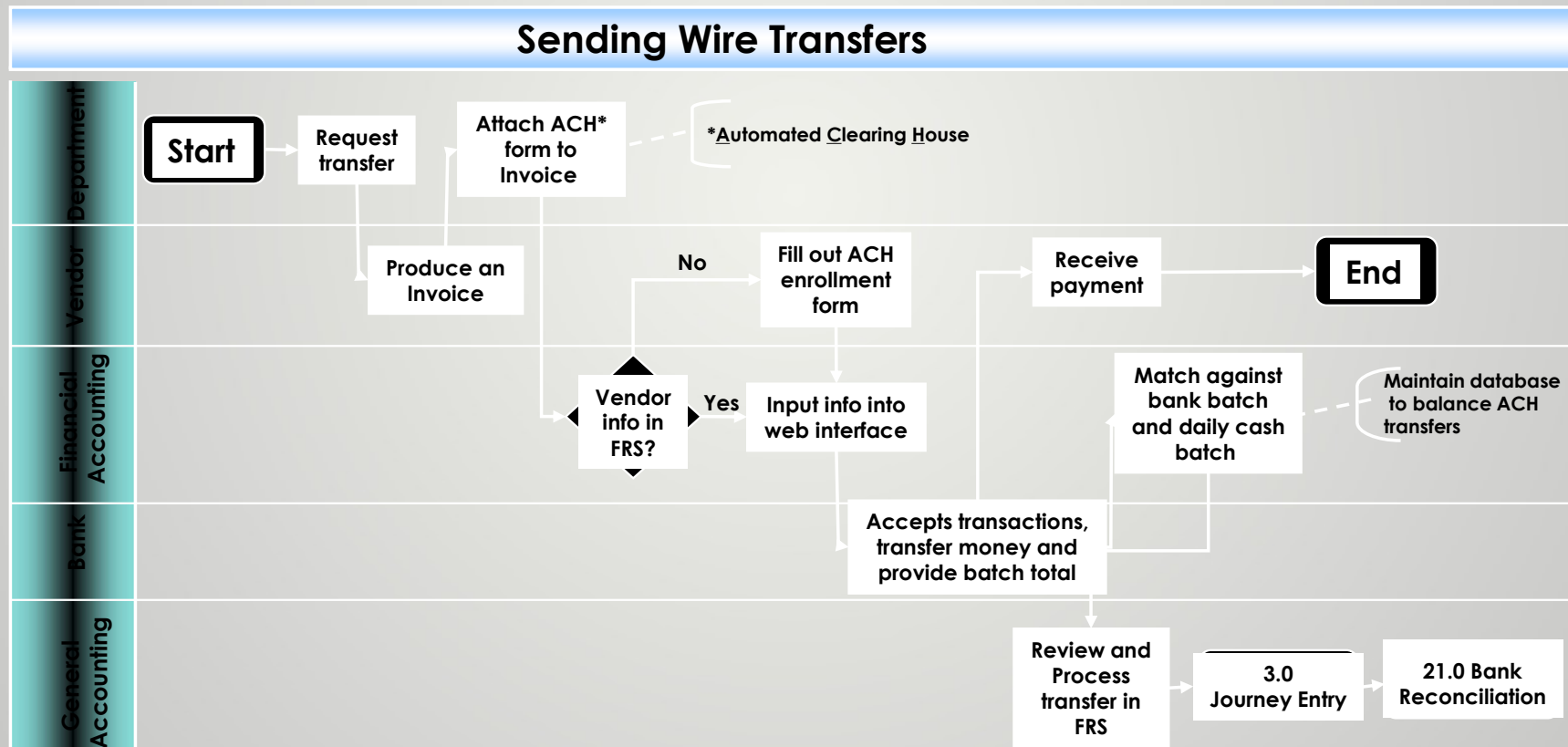


# *Other Ways of Presenting the Business Process*

# Swim Lane (or Cross-functional) Chart

When multiple departments or functional groups are involved in a complex process it is often useful to use Cross Functional Process Maps.

- Draw in either vertical or horizontal Swim Lanes and label the functional groups then draw the Process Map





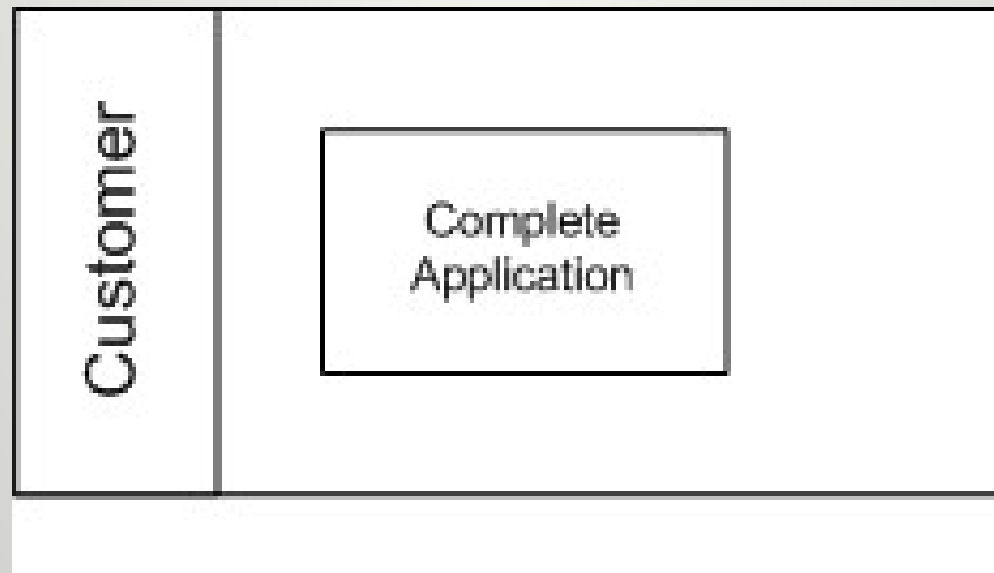
# The Actors

- Participant in the process
- Role, person, system
  - IT can be an actor
    - If fully automated
- Represented by swim lane
- Performs a task

Customer	
Customer services	
Card services	

# Tasks Carried out by the Actors

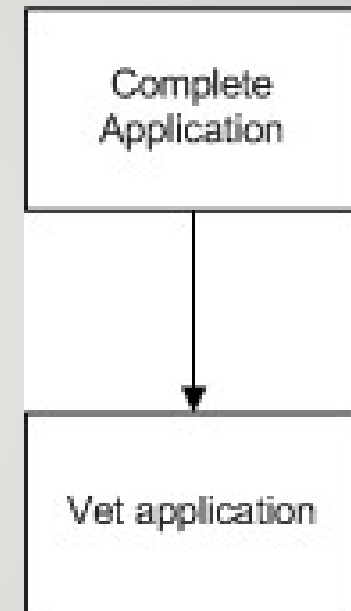
- What tasks must be performed by actors?
  - What work needs to be done?
- Represented by boxes
  - Annotation to show the use of IT
  - (System, “O”)



# Flow or Hand-Off

## Flow...

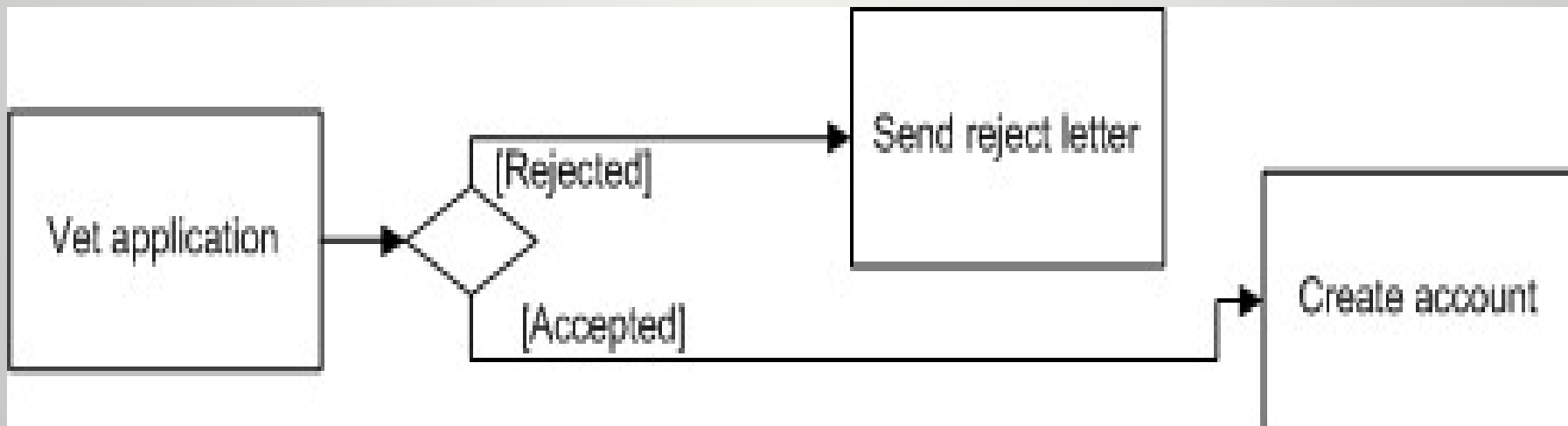
- After task A do B
- Transfer of control
- Precedes next task
- Represent by arrows
- When the flow goes to another actor (in another swim lane) we refer to this as a “hand-off”



# Decision/Branch

## Decision Point...

- ❑ After A do either B or C
- ❑ Under what conditions
- ❑ Represent by decision diamond shape





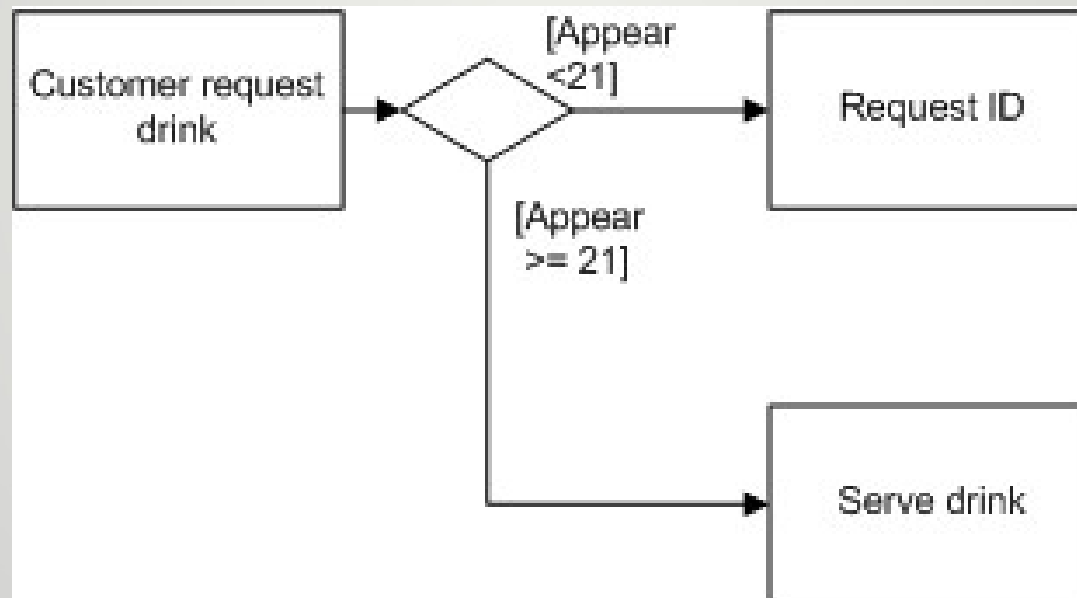
# Business Rules

- Underpin decisions
- Need to be examined for relevance and appropriateness
- Simple Examples
  - Ask for ID if under 21
  - Request ID before flights are booked for staff
  - Do not complete booking if profile is not fully completed
  - Follow health and safety guidelines
  - Complete within three days
  - Expense claims will only be reimbursed with full back up and line manager approval

# Representing Business Rule

Ask for ID if look under 21

- Underpinning decision

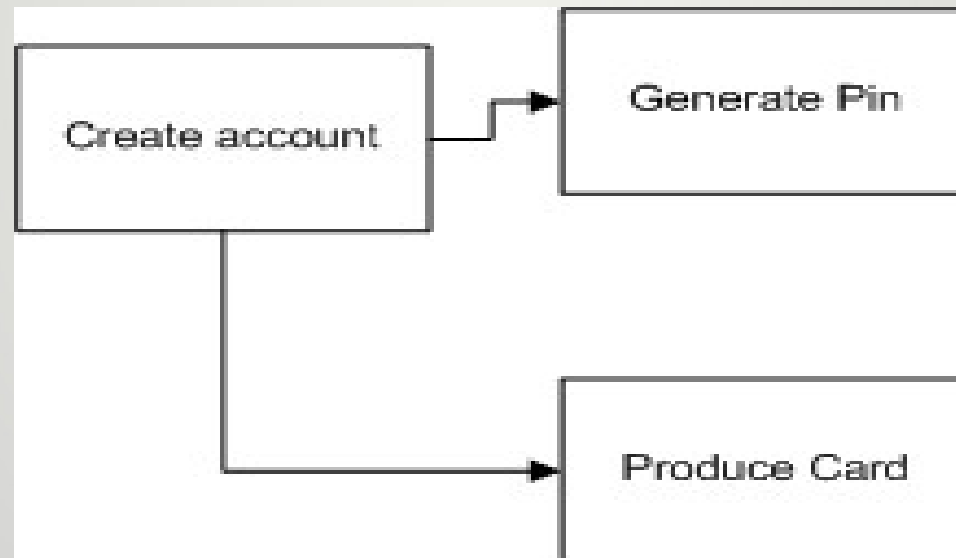




# Flow Rules: Parallel

Flow...

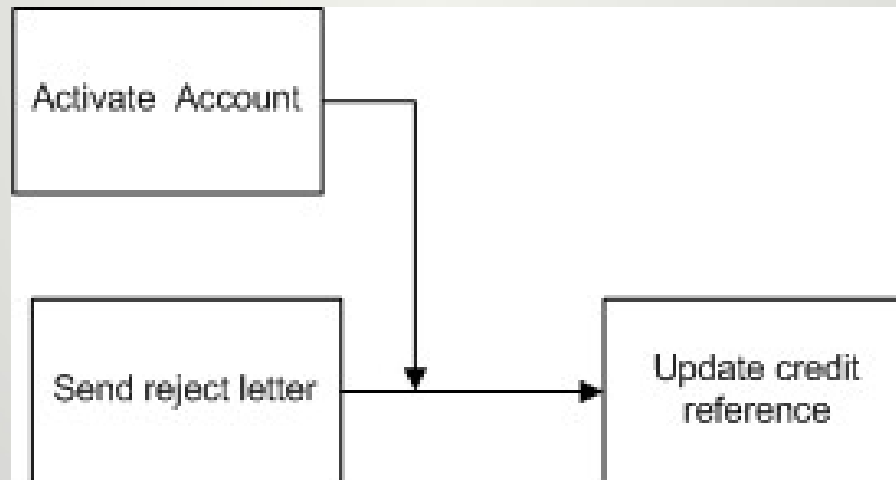
- Parallel flow
- After A do both B and C



# Flow Rules: or also known as Merge

Flow...

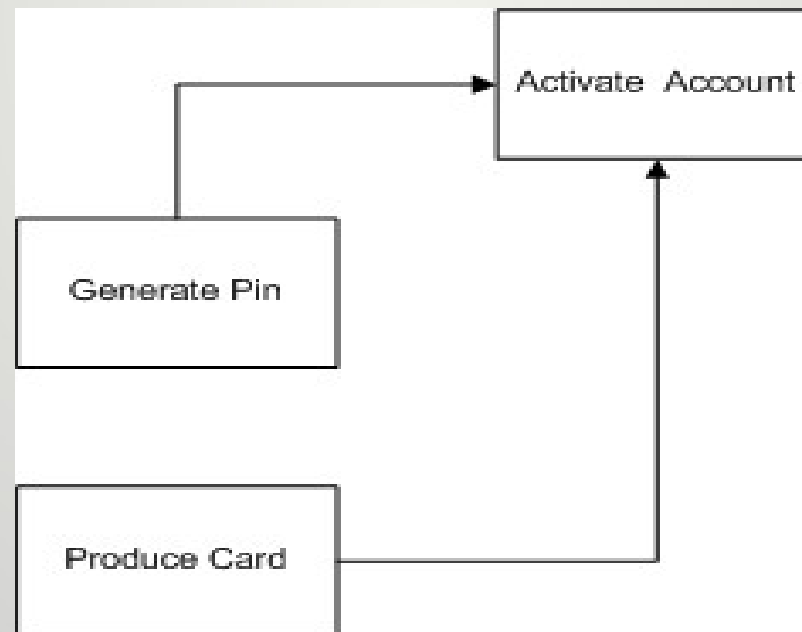
- Merge
- C can start when either A or B have finished



# Flow Rules: and known as Join

Flow...

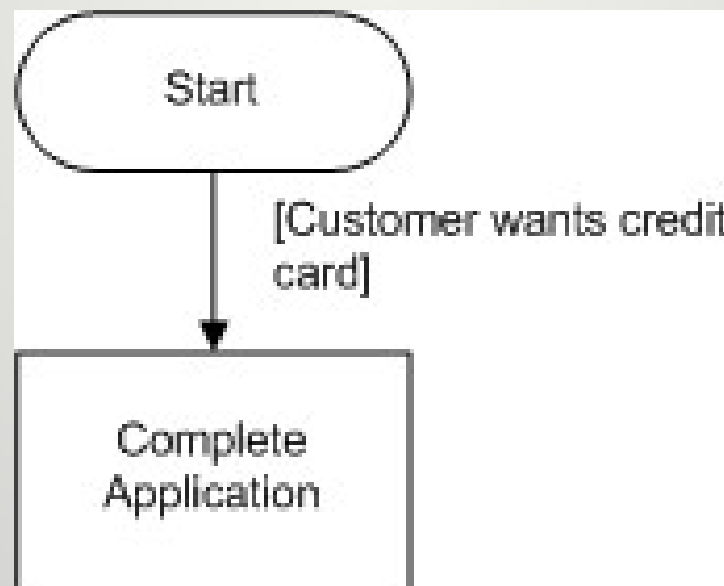
- Join (possible source of delay)
- C can start when both A and B have finished



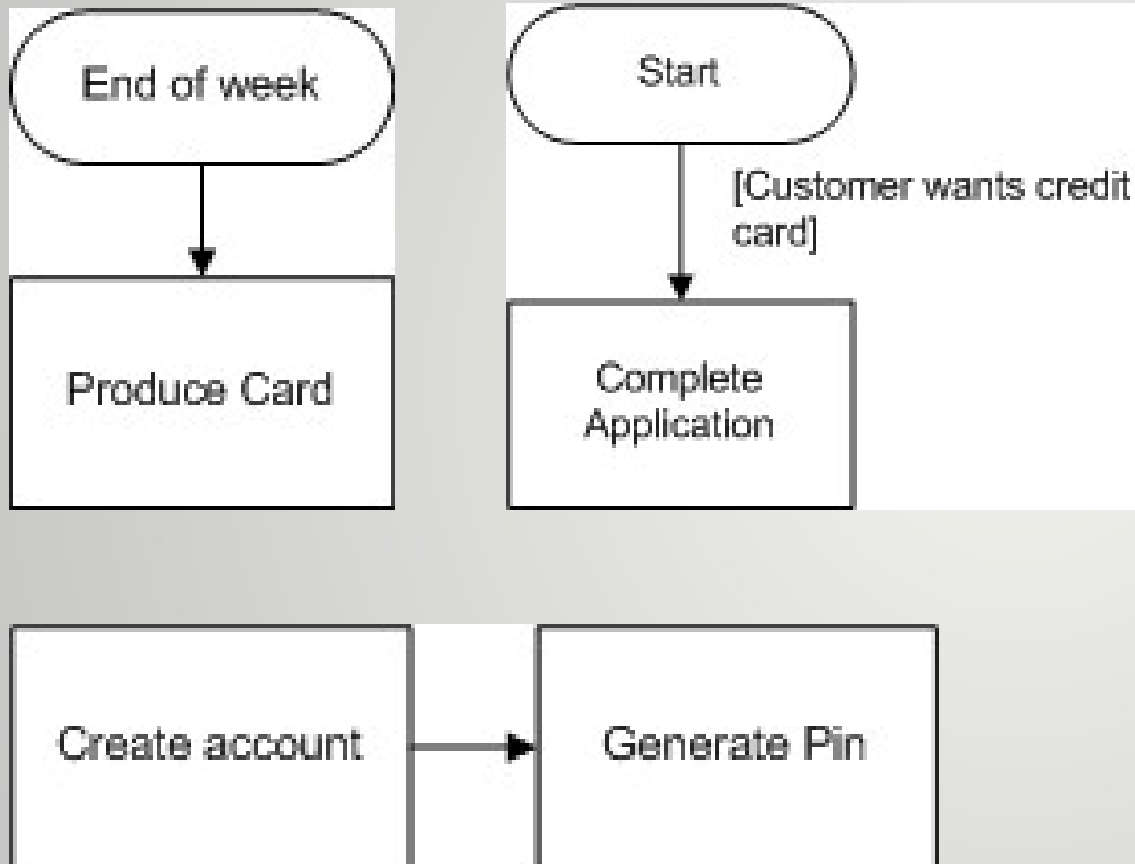
# Start Point (The Trigger)

A process starts when the first task is triggered

- Internal
- External
- Time



# Triggers/Events



This is how we model other events that might trigger tasks within the process.

Note that the start of the process is treated differently: the event is written on the line.

If the event triggers a task in the process, then the event is written in the symbol, such as "weekend". It is a temporal event.

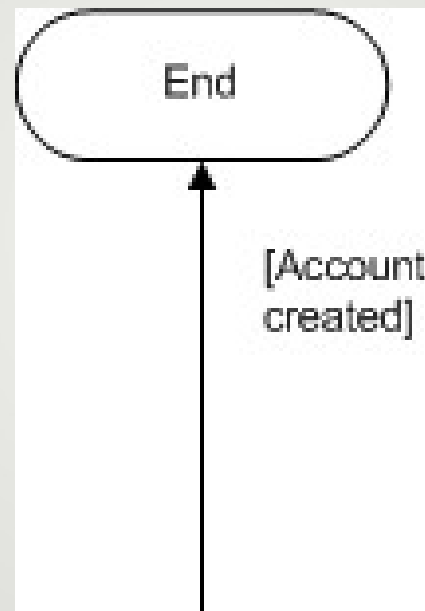
The result of "create account" triggers "Generate PIN".

("Create account" is not an event.)

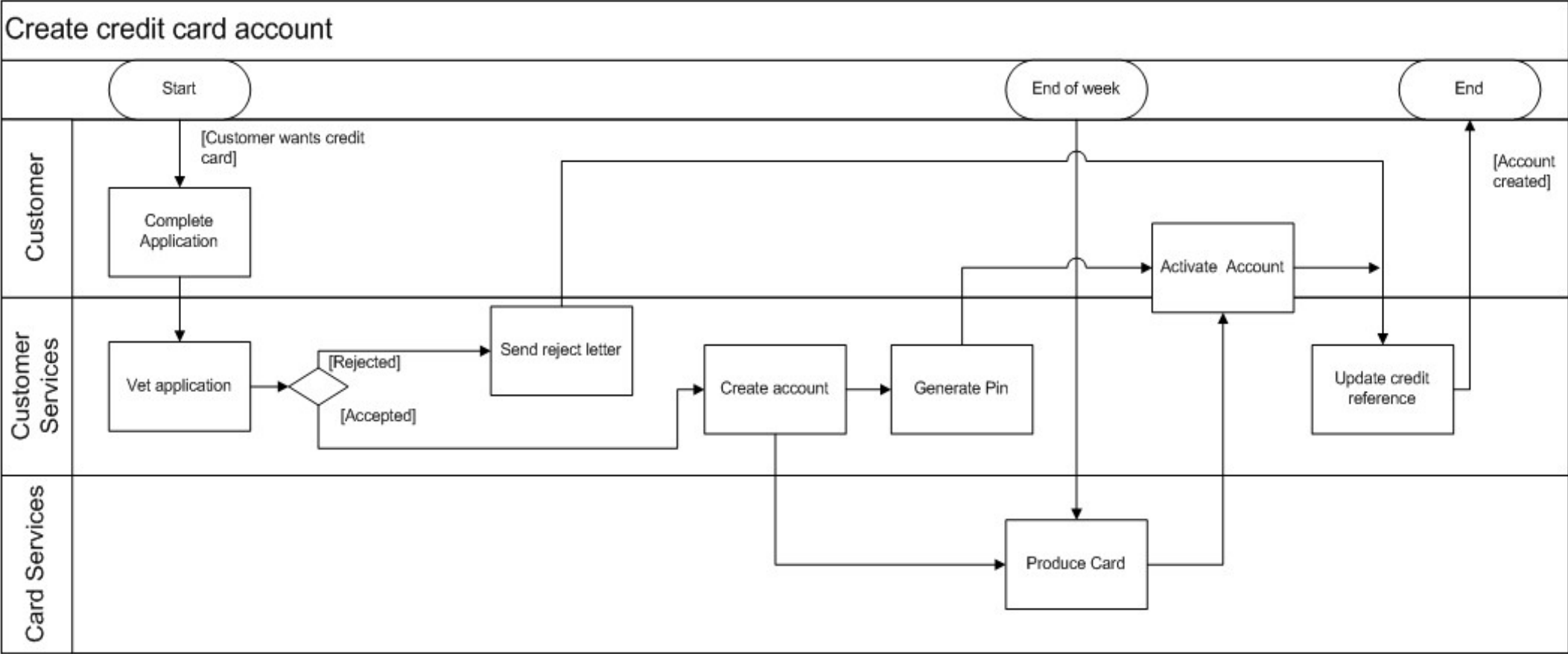
This is an internal event.



# Process Outcome



# Example Business Process



# Example Documentation

<b>Task</b>	<b>Take order</b>	
<b>Event</b>	Customer rings in	
<b>Inputs</b>	Customer code Products required Product quantity required	
<b>Outputs</b>	Completed order Rejected order (over credit limit) Partial order (some stock not available)	
<b>Applicable standards</b>	Sales of goods act	
<b>Actor</b>	Sales Order Clerk	
	<b>Steps</b>	<b>Rules</b>
<b>1</b>	Request customer code	Must be an existing customer – refer to sales if not
<b>2</b>	look up customer details	
<b>3</b>	Check credit limit	Must be within credit limit to proceed – refer to credit control if not
<b>4</b>	Add products to order	
<b>Time Taken</b>	Average 20 mins. depending on size of order	

# If... Then... Else Statements

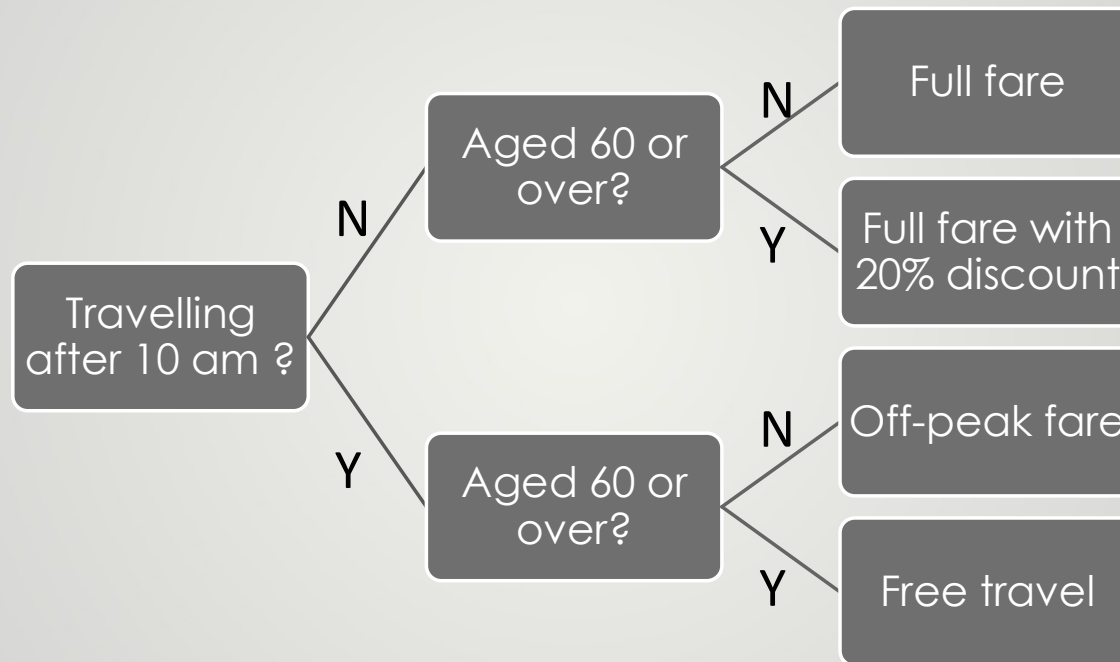
**If** customer is over credit limit

- **Then** refer to credit control
- **Else** proceed with the order

3	Check credit limit	Must be within credit limit to proceed – refer to credit control if not
3	Check credit limit	If customer is over credit limit then refer to credit control else proceed with order



# Decision Trees





# What Is The Proof That The Problem Does Exist?

## Using the 5W, 2H

**W**hat is the problem?

**W**hen does it happen?

**W**here does it Occur?

**W**hy does it happen?

**W**ho does it affect?

**H**ow does it happen?

**H**ow **m**uch is it?

- **W**HERE

• ...TAKES YOU TO WHERE TO FIND DATA

### **How**

...tells you what to collect data on

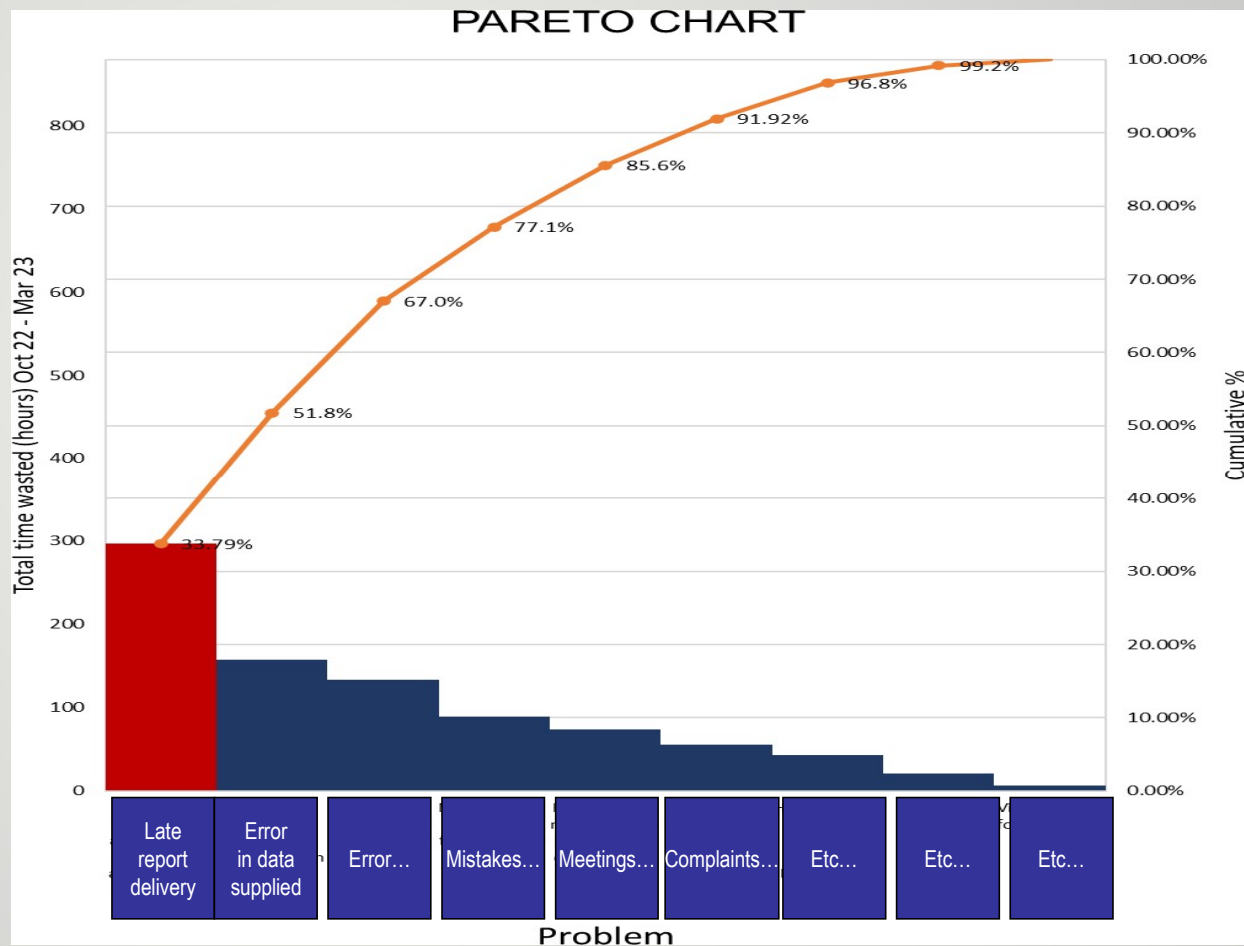
### **How much**

...result of collected data

T

# What Is The Proof That The Problem Does Exist?

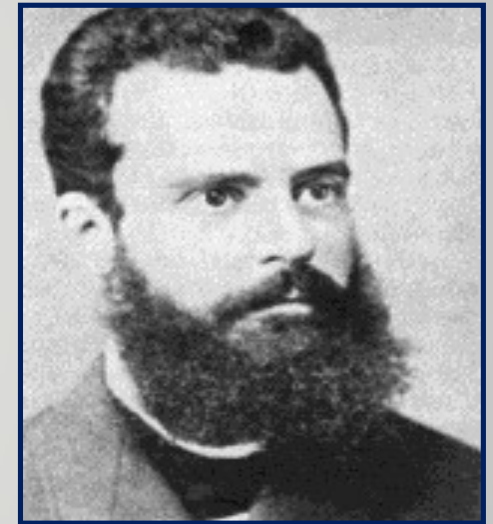
For example,  
you could  
collect data  
on time taken  
on respective  
tasks



# Pareto Principle...

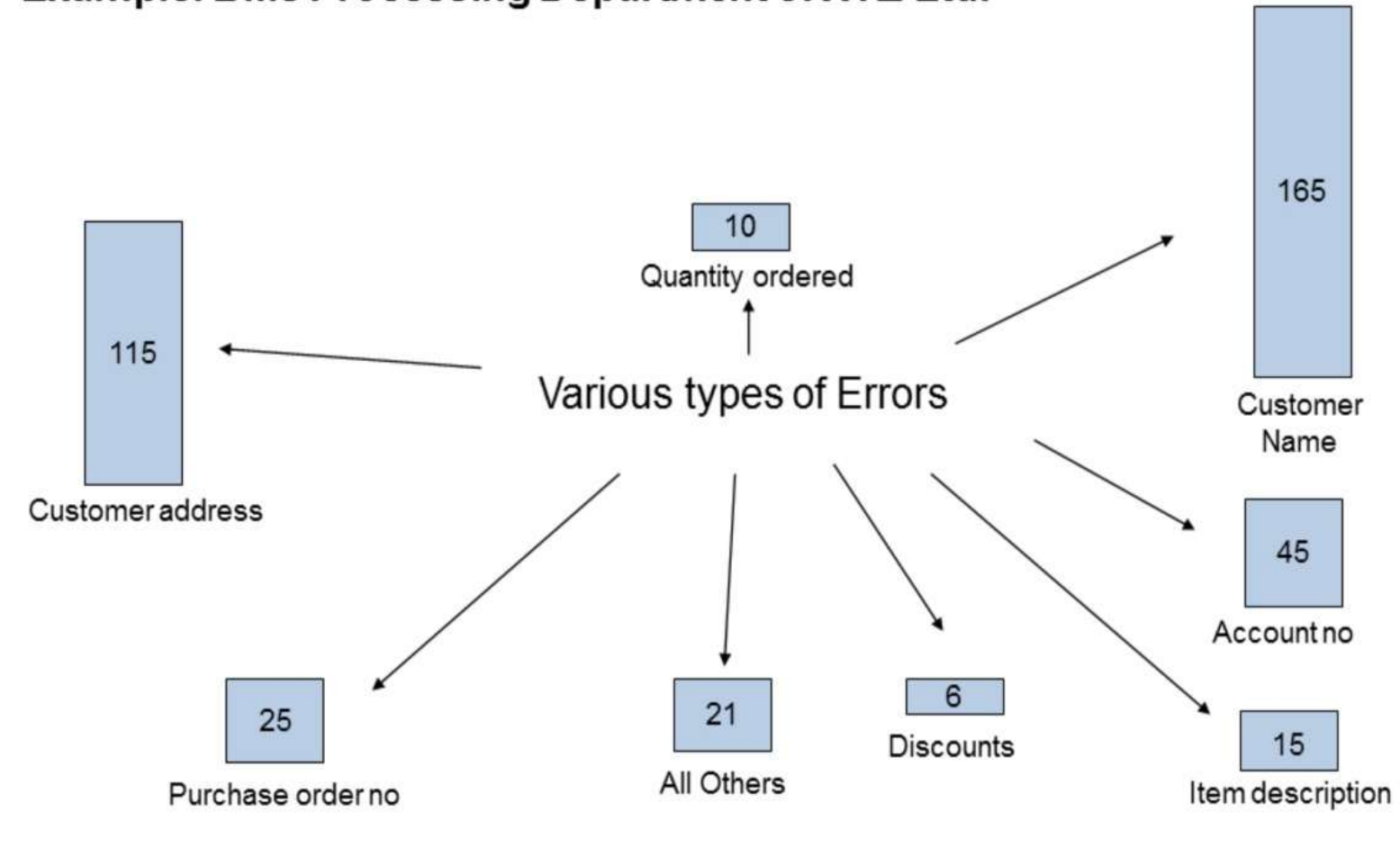
The **Pareto principle** (the **20–80 rule**, the **law of the vital few**, or **principle of factor sparsely**) states that for many events, roughly 80% of the effects come from 20% of the causes

Italian economist Vilfredo Pareto observed in 1906 that 80% of the land in Italy was owned by 20% of the population. He developed the principle by observing that 20% of the pea pods in his garden contained 80% of the peas.



# Pareto – An Example

## Example: Bills Processing Department of XYZ Ltd.



About 400 invoices with errors have been collected. The types of error have been determined.

[Note that 21 individual errors have been combined at the end]

This information here is then placed onto a Pareto Chart – see next slide.

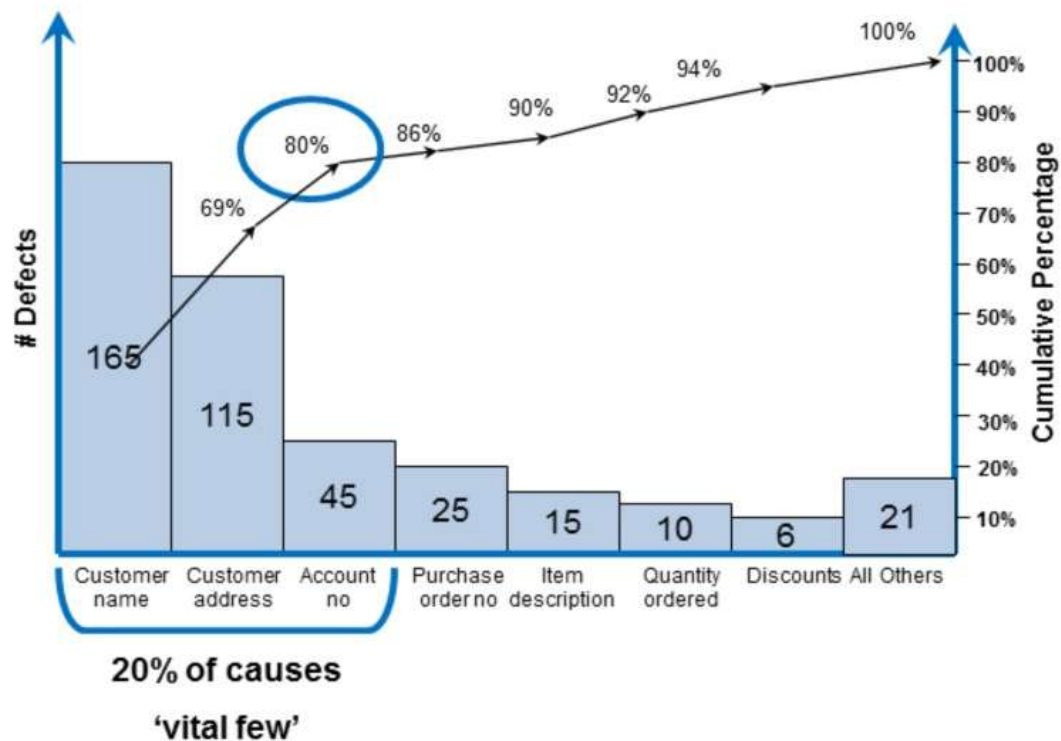
# Pareto – An Example (contd.)

## ADVICE:

Focus first on the largest bar – this could reduce errors by 40% (not bad for a GB improvement). Having completed that move to the next one, etc.

Another benefit of the Pareto is that it can be used as a before and after picture to demonstrate improvement at Control.

## Example: Bills Processing Department of XYZ Ltd.



A few points to remember:

- The split isn't always exactly 80 and 20 in real data, but the effect is often the same
- Pareto charts can be used to further drill down on specific causes



# Ascertain the Proposed Solution

Once the team has identified the root cause(s) of a problem, it is ready to begin the remedial journey. This step requires six activities.

- Evaluate alternatives
- Design remedy
- Design control
- Design for culture – overcoming resistance to change
- Prove effectiveness
- Implement

## **PILOT TESTING**

Getting It Right  
*(Before)* the First Time



# Possible Solutions

## Reversible solutions?

Send all managers on a  
handwriting Course

Train the managers in tidy  
form filling

## Irreversible solutions

Redesign the forms to make  
them easier to find  
information and to attempt  
to eliminate handwriting by  
ticking boxes. Also forces us  
of the correct terminology

## Solution

- VERIFY SOLUTION
- THINK OF FOOL PROOFING
- OPTIMISE RESULTS
- `SELL' TO THOSE AFFECTED – OBTAIN THEIR IDEAS, INVOLVE THEM AND GIVE RECOGNITION. LISTEN TO OBJECTIVES  
- ASK HOW THE PROBLEMS MAY BE OVERCOME
- TRAIN AND GIVE CONFIDENCE

**IMPLEMENTATION**

## Implementation

- VERIFY SUCCESS UNDER OPERATING CONDITIONS
- METHODS: COLLECT DATA, COLLECT OPINIONS, FINE TUNE THE PROCESS
- FOOL PROOF WHEREVER POSSIBLE
- OTHERWISE INTRODUCE A PROCESS AUDIT

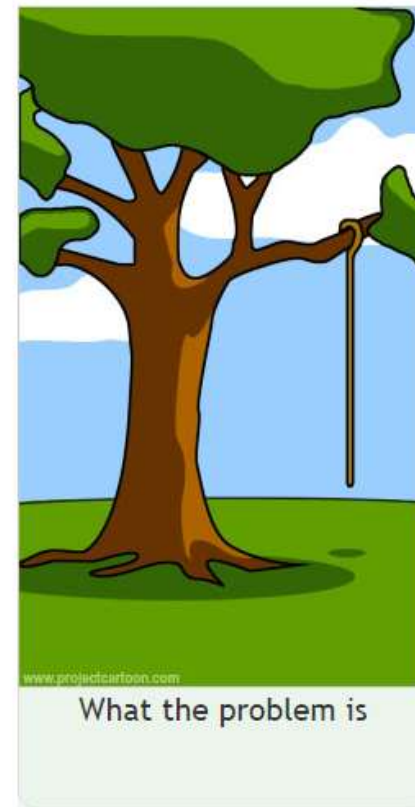
**FOOL PROOFING**

## Fool proofing

**Fool Proofing: Something done so well that it is incapable of going wrong**

# Test the Solution

- COLLECT DATA THAT WILL BE COMPARED TO WHAT WAS COLLECTED AT THE START (AS IS) THAT PROVED THE EXISTENCE OF THE PROBLEM.



# Post Implementation Monitoring

TO ENSURE THE  
SUSTAINABILITY OF THE  
IMPROVED PROCESS...

- ❖ DESIGN EFFECTIVE  
QUALITY CONTROLS
- ❖ FOOLPROOF THE  
REMEDY
- ❖ AUDIT THE CONTROLS





## Pre-Implementation Phase

## Implementation Phase

## Competency



# The Steps of 5S

**Seiri (Sort):** Clean up and sort all material, equipment and unnecessary information

**Seiton (Set in Order):** Make necessary input available in a logical order and available

**Seiso (Shine):** Ensure any input is ready to be used

**Seiketsu (Standardise):** Identify standard activities and practices and means to monitor them (eg inspections)

**Shitsuke (Sustain):** Introduce and support a mind set of continuous improvement



**A place for everything and everything in its place, clean and ready to use**

# What is 5S?

## The 5S is a simple tool to

- introduce discipline in the organisation of physical space and processes
- improve the environment
- raise morale
- increase workplace safety
- improve productivity and response times
- impress your customers
- highlight where to remove waste and non-value add activities



# Mistake Proofing: Poka Yoke

Poka Yoke can be translated as “**Mistake Proofing**”

The objective was to eliminate errors before they occur, rather than finding and fixing them

The ideal Poka Yokes are:

- Inexpensive
- Simple and easy to implement
- Developed by every employee



# Two Main Types of Poka Yoke

The original objective was to eliminate errors and fix them before they occurred. However, this purpose has changed somewhat as the Poka Yoke concept evolved

Many people split Poka Yoke into two main types:

- **Shut out type:** Physically preventing an error being made (preferable)
- **Attention type:** Highlighting that an error has been made (acceptable)



# Poka Yoke – 3 Golden Basic Rules



## When to use Poka Yoke

- When a process or product is likely to have error or may go wrong.
- Some of the errors that are captured by Poka-Yoke are when the process operations are sub- standard or not operated at their standard operating procedure (processing errors).



# Advantages of Poka Yoke

## *Mistake Proofing advantages include:*

- Only simple training programmes are required
- Inspection operations are eliminated, and the process is simplified
- Relieves operators from repetitive tasks of typical visual inspection
- Promotes creativity and value adding activities
- Results in defect free work
- Requires immediate action when problems arise
- Provides 100% inspection internal to the operation



# Some Improvement Ideas: A Couple of Videos

## Bank One video

[https://www.youtube.com/watch?v=9wg4b9fgfWk&list=PLiZdP6VtM9YctW\\_1PmEebz5jfpoqBvOXH&index=4](https://www.youtube.com/watch?v=9wg4b9fgfWk&list=PLiZdP6VtM9YctW_1PmEebz5jfpoqBvOXH&index=4)

## AUTO INSURANCE VIDEO

[HTTPS://WWW.YOUTUBE.COM/WATCH?V=1CIV62FKWRU&LIST=PLIZDP6VTM9YCTW\\_1PMEEBZ5JFPOQBVOXH&INDEX=9](https://www.youtube.com/watch?v=1CIV62FKWRU&list=PLiZdP6VtM9YctW_1PMEEBZ5JFPOQBVOXH&index=9)



## SESSION 7

# EFFECTIVE TEAM SUSTAINABILITY



# Evaluate the Outcomes

One of the most valuable and important aspects of team productivity is to evaluate outcomes amongst the team.

- What worked well?
- What could have been done better?
- What tools and techniques worked well for the organisation?
- Was it fully participative?
- What recognition is required?
- Are remedies sustainable?

**Consider questions such as the above to determine success of the programme intervention.**

# What are the Learning Points?





# Effective Team Sustainability

**Building Long-Term Performance Without Burnout and maintain the gains accomplished by standardising the process:**

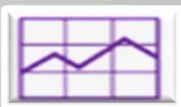
This module is the strategic differentiator of the programme. It ensures performance does not collapse after short-term improvement.

## **Session Purpose**

Most teams can improve performance temporarily. Very few sustain it.

This session equips participants to:

- Maintain high performance over time
- Prevent burnout and disengagement
- Institutionalise performance rhythms
- Build a culture of continuous learning



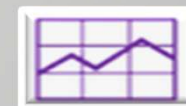
**Maintain  
the solution**



# Exercise



**Why do many teams improve after training  
— but return to old habits within 3 months?**



**Maintain  
the solution**

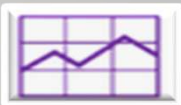


# Why High-Performance Collapses

**Why do many teams improve after training  
— but return to old habits within 3 months?**

## **Core Reasons Performance Declines**

1. No structured follow-up
2. KPI overload
3. Lack of ownership
4. Poor meeting discipline
5. Burnout and cognitive fatigue
6. No feedback culture
7. Leadership inconsistency



**Maintain  
the solution**

# Burnout Prevention & Energy Management

## A. Understanding Burnout in Teams

Burnout is not just exhaustion. It includes:

- Emotional fatigue
- Cynicism
- Reduced effectiveness
- Withdrawal behavior

Early Warning Signals:

- Increased conflict
- Reduced initiative
- Declining meeting participation
- Passive compliance
- Increased absenteeism

## B. The Sustainable Performance Equation

Sustainable Performance =

Clear Priorities + Accountability + Psychological Safety + Energy Management

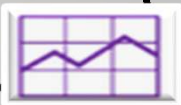
If one element is missing, performance erodes.

## C. Practical Framework: The Workload Balance Matrix

Activity – Participants assess their team on:

- Task volume
- Role clarity
- Cognitive load
- Emotional pressure
- Recovery time

**Regular Review:** Identify one area of overload and propose redistribution strategies.



**Maintain  
the solution**

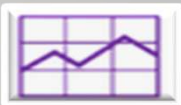
# Performance Rituals & Team Rhythms

High-performing teams operate with structured rhythms...

Without rhythm → chaos

With excessive control → rigidity

The balance is **Structured Discipline...**



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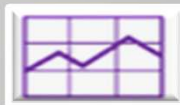
# Performance Rituals & Team Rhythms

## A. Core Team Rituals

- 1. Weekly Performance Review (45-60 mins)**
  - KPI review
  - Gap identification
  - Ownership assignment
  - Decision tracking
- 2. Daily or Bi-Weekly Stand-Ups (10-15 mins)**
  - What was completed
  - What is next
  - Blockers

- 3. Monthly Strategic Alignment Check**
  - Progress vs objectives
  - Adjustment of priorities
- 4. Quarterly Reset Session**
  - Performance evaluation
  - Process improvement
  - Objective recalibration

**Determine Structured Team Rhythm Blueprint:**  
Meeting types | Frequency | Duration | Agenda structure | Ownership



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# Continuous Feedback & Learning Culture

Teams stagnate when feedback disappears.

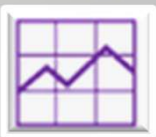
## A. Feedback as a Performance Accelerator

High-performing teams:

- Give feedback early
- Separate person from behavior
- Focus on improvement
- Encourage upward feedback

## B. Feedback Framework: SBI Model

- Situation
- Behaviour
- Impact



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the solution**

# Reflection: From Learning to Action

- What insights from this programme will you apply immediately?
- What changes can your team begin implementing now?
- What commitments will you personally make to improve team productivity?



# Team Commitment

**Each team should identify at least one of each from below:**

- Improvement(s) to implement immediately
  - KPI(s) to start monitoring
- Behaviour(s) to strengthen collaboration





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Trust Pilot Link:

<https://www.trustpilot.com/review/www.makewayglobal.com>



**"That's  
all  
folks!"**

