

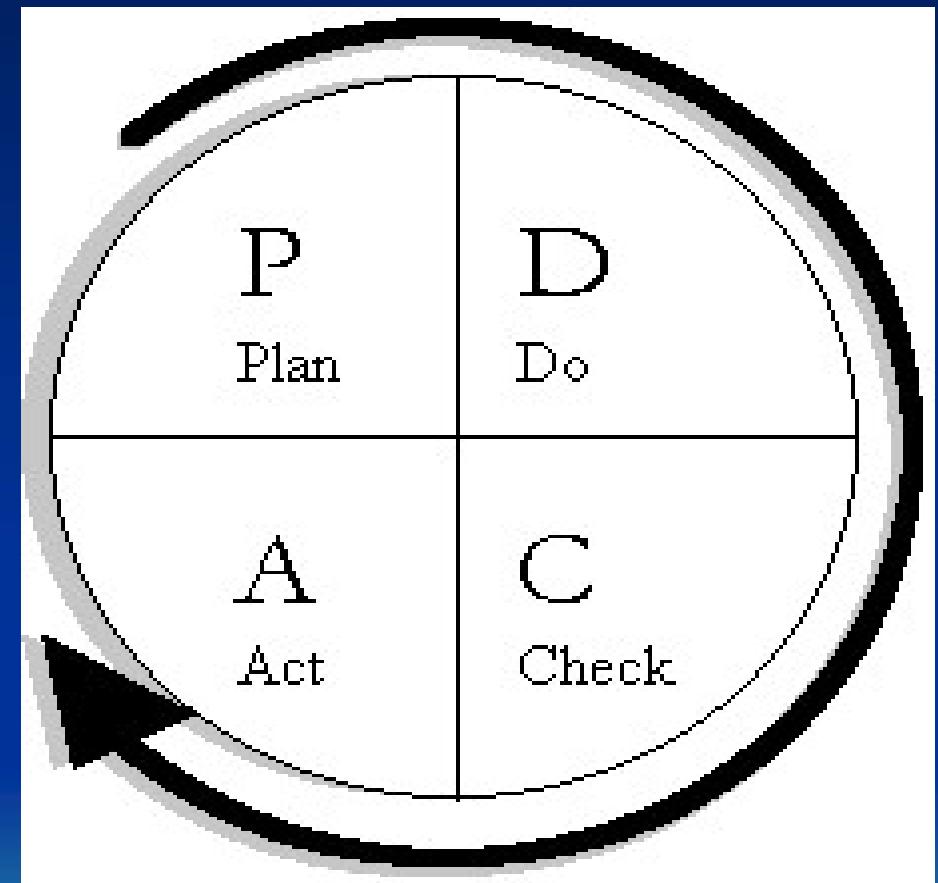
NC-Circle Training: Module 2

Project Circle Process



Introduction

- **Steps involved in the Project Circle Process**
- **Appropriate tool usage for each step**
- **Scoring of each step**
- **Overall and technical scoring**



Step 1- Team Development

- **What is involved?**
 - Associates unite to reach a common goal
- **Why do this step?**
 - To define the team's organization, the team member's roles and responsibilities in order to function effectively



Step 1- Team Development

- **Scoring:**
 - 1 Point: Team member's roles and responsibilities defined
 - 2 Points: Team used decision making tool(s) to define roles and responsibilities
 - 3 Points: Team member's roles and responsibilities were defined by weighing strengths and skills or considering other circumstances
 - 4 Points: Team met and exceeded all of the above guidelines



Step 1- Team Development

- **Select a name:**
 - Use brainstorming techniques to come up with potential names
 - Names can be generic and used for several circles or can be specific to the particular circle
 - Come up with a consensus or majority vote to determine the team name



Step 1- Team Development

- Determine the role of each member
 - Each team requires a leader, a sub-leader, a secretary and general members
 - Build an “Officer Selection Matrix”: chose several categories and have each team member rate themselves as to their abilities in each category



Step 1- Team Development

- In this scenario Jenny has the highest score and becomes the leader

Scoring: 5-High Skills, 4-Above Average Skills, 3-Average Skills, 2-Below Average Skills, 1-Little or No Skills

Step 1- Team Development

- **Roles and Responsibilities:** members may alternate in their actual responsibilities
 - Leader- scheduling and conducting meetings, keeping team focused and on schedule, delegation of tasks
 - Sub-Leader- assumes leader's role when leader is absent, similar general roles
 - Secretary- responsible for all documentation
 - Members- general tasks



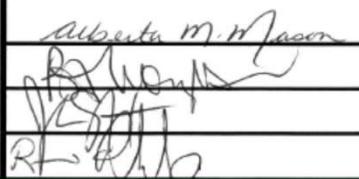
Step 1- Team Development

- **Roles and Responsibilities:**
 - **MEMBERS ARE RESPONSIBLE TO CONTRIBUTE ON ALL ASSIGNED TASKS REGARDLESS OF ROLE!!!!!!**



Step 1- Team Development

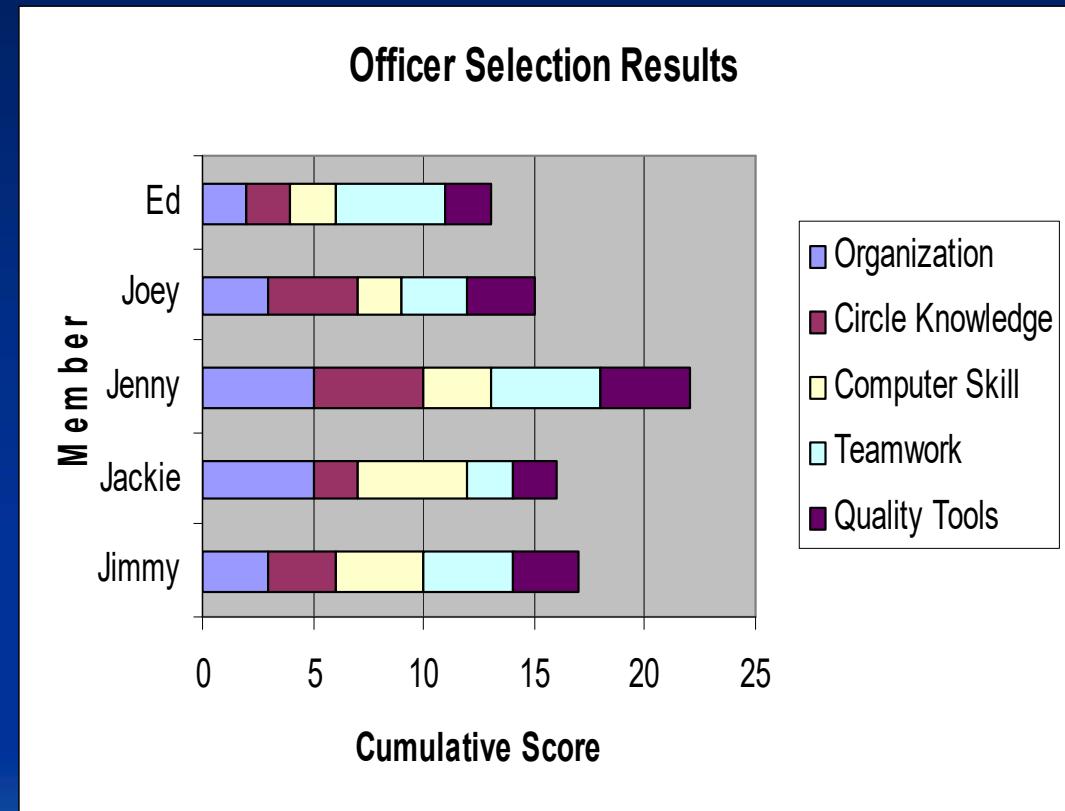
- **Code of Conduct:**
 - Each team should develop and a Code of Conduct defining attendance, assignment completion and participation requirements
 - Code should contain meeting parameters (day, time and location) and be signed by all team members

Team Name:	Office Monkeys
Leader:	Alberta Mason
Sub Leader:	Bart Thomson
Secretary:	John Gaffiero
Member:	Brian Piotrowski
Meetings- Day:	Thursdays
Time:	2:15 to 3:15
Location:	The Monkey Cage (aka the front office meeting room)
Code Of Conduct	
<ol style="list-style-type: none">1) Have fun2) Be on time for meetings3) One banana per monkey4) Complete assignments on time5) Respect everyone's opinions/ideas6) Co-operate and support each other	
Signatures	
Date 10/22/2008	
	

Step 1- Team Development

- Tools suitable for this step:

- Brainstorming
- Selection Matrix
- Bar or Column Graphs



Step 2- Reason for Theme Selection

- **What is involved?**
 - Team identifies a project theme and how it will support the department or company business plan
- **Why do this step?**
 - To prove the need to address a current issue and the fact that it supports the business plan



Step 2- Reason for Theme Selection

- **Scoring:**
 - 1 Point: Theme stated with no supporting data
 - 2 Points: Theme stated and supported with data
 - 3 Points: Data and quality tools used to select project, stakeholders identified, explanation of how project was selected
 - 4 Points: Data and quality tools used to select project stated, explanation of how stakeholders were involved in the process and why project was selected
 - 5 Points: Data and quality tools used to select project stated with stakeholder involvement and aligned with business plan



Step 2- Reason for Theme Selection

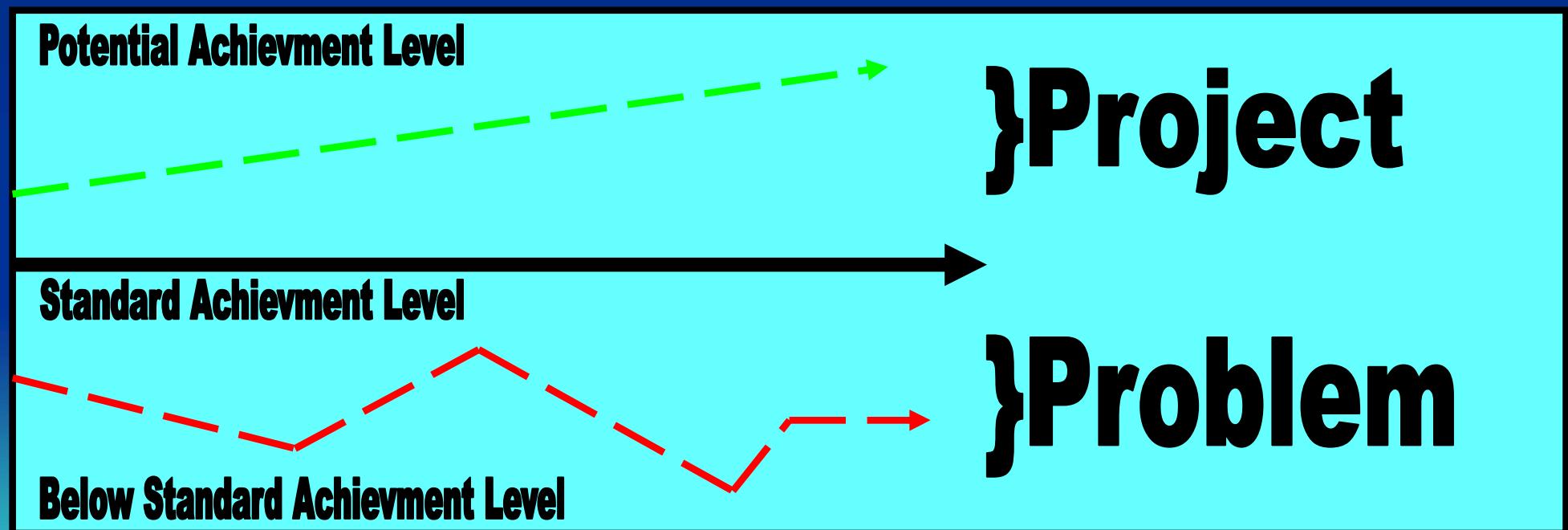
- Use brainstorming techniques to come up with ideas for themes
- Develop a selection matrix and list all the ideas in the left hand column

Theme Idea	If Situation Improves		If Nothing is Done		Achievability	Total		
	Benefit Impact		Negative Impact					
	Associates	Business	Associates	Business				
Damaged Parts	2	5	3	5	3	18		
First Aid Incidents	5	5	3	4	4	21		
Waste Reduction	3	4	2	3	5	17		
Manpower Efficiency	2	5	2	2	4	15		



Step 2- Reason for Theme Selection

- Once an achievable theme is selected determine whether it would be considered a “project” or a “problem”



Step 2- Reason for Theme Selection

- **As this is a project the theme should address an item or situation that is already performing at an acceptable level but can be improved to perform at a higher level**
- **Make a list of all stakeholders in the theme and how the project will affect them**



Step 2- Reason for Theme Selection



Step 2- Reason for Theme Selection

- Theme must tie into company business plan for the fiscal year
- This ensures that associate driven activities align with company goals

QUALITY
COST
DELIVERY
MANAGEMENT
SAFETY
ENVIRONMENT

Step 2- Reason for Theme Selection

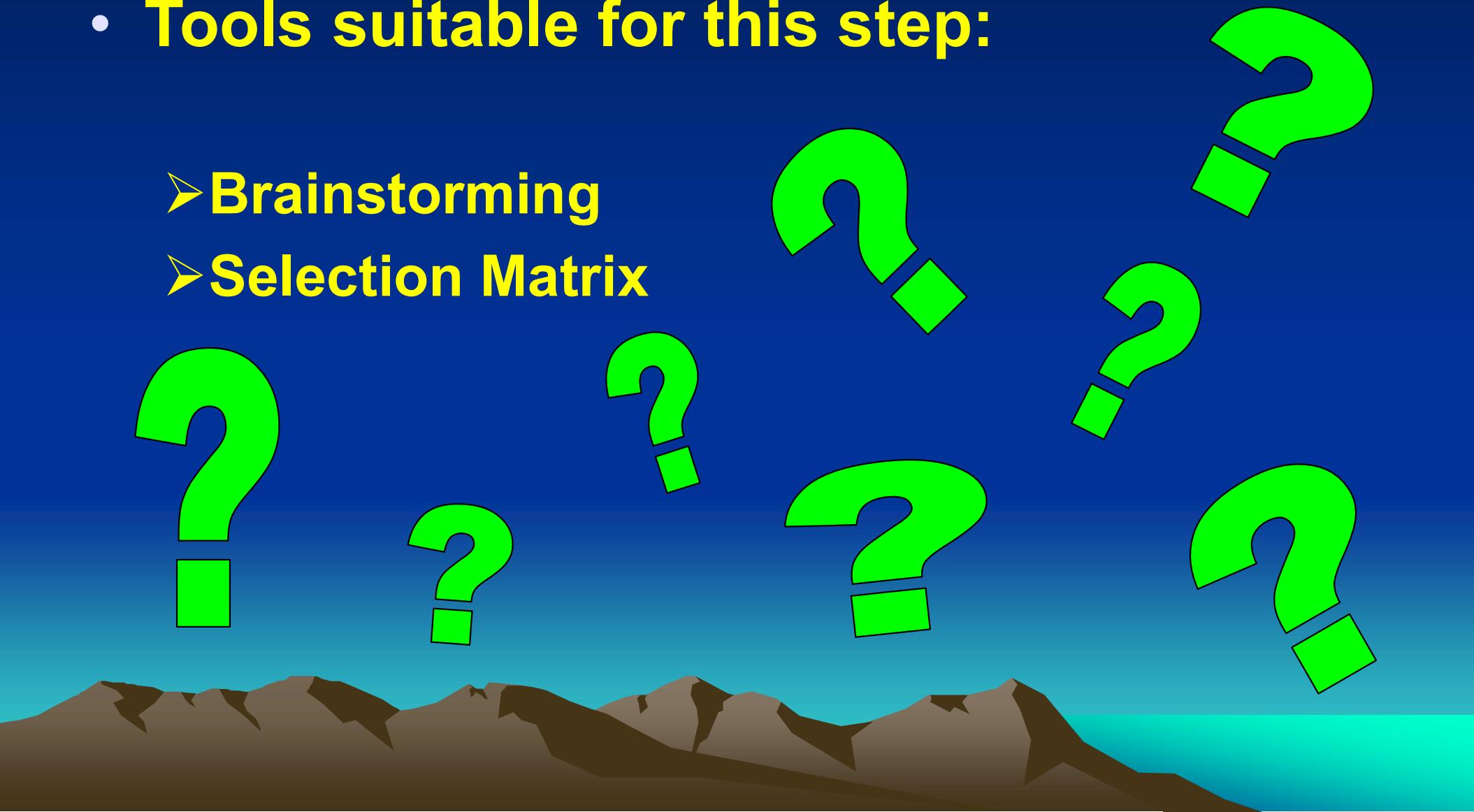
- **Helpful hints for this step:**
 - Themes involving company policies or benefits, personal, social, economic or political issues are not appropriate
 - See the team's facilitator or executive sponsor for business plan tie ins.
 - Extract and include the excerpts of the business plan that the theme ties into



Step 2- Reason for Theme Selection

- Tools suitable for this step:

- Brainstorming
- Selection Matrix



Step 3- Project Statement

- **What is involved?**
 - The team writes a project statement in order to communicate the performance requirements and possible time and cost restraints
- **Why do this step?**
 - To help focus the team on what its mission will be



Step 3- Project Statement

- **Scoring:**
 - 1 Point: Team mentioned a project statement, but with no explanation
 - 2 Points: Team mentioned a project statement and identified performance requirements
 - 3 Points: Same as above including time constraints
 - 4 Points: Same as above including specific cost constraints
 - 5 Points: Team achieved all guidelines by thoroughly explaining how constraints were identified



Step 3- Project Statement

- **Your project statement must include an action, an object, an accomplishment and a completion date**

Function Of Statement	Item
Action	Implement
Object	HRIS
Why	To improve the quality, delivery and timeliness of critical HR data
When	By April 1, 2008

“The team shall implement a Human Resources Information System to improve the quality, delivery and timeliness of critical Human Resources data by April 1, 2008”

Step 4- Activity Plan

- **What is involved?**
 - The team develops an activity schedule
- **Why do this step?**
 - To set timeframes for the completion of each step



Step 4- Activity Plan

- **Scoring:**
 - 1 Point: Activity plan is presented
 - 2 Points: Activity plan is properly constructed and used in a logical manner that is relevant to the project



Step 4- Activity Plan

- Create a timeline from the start of the circle to the presentation date and divide it into weekly periods
- Enter all the steps of the circle in the left hand column
- For each step of the circle estimate how long it will take to complete and plot it on the chart



Step 4- Activity Plan

- **Keep two copies of the activity plan**
 - A copy with the planned schedule on it only to show this step in the presentation
 - A working copy that is used to track the actual progress of the project to show Step 15 in the presentation



Step 4- Activity Plan

- **Tool suitable for this step: Gantt Chart**

Step 5- Situation Description & Analysis

- **What is involved?**
 - The team prepares both visual and data descriptions of the current situation
- **Why do this step?**
 - To ensure that all team members have a thorough understanding of the baseline data which is needed to measure improvements



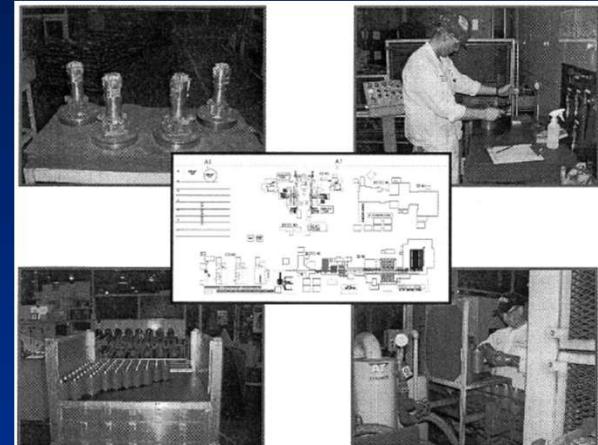
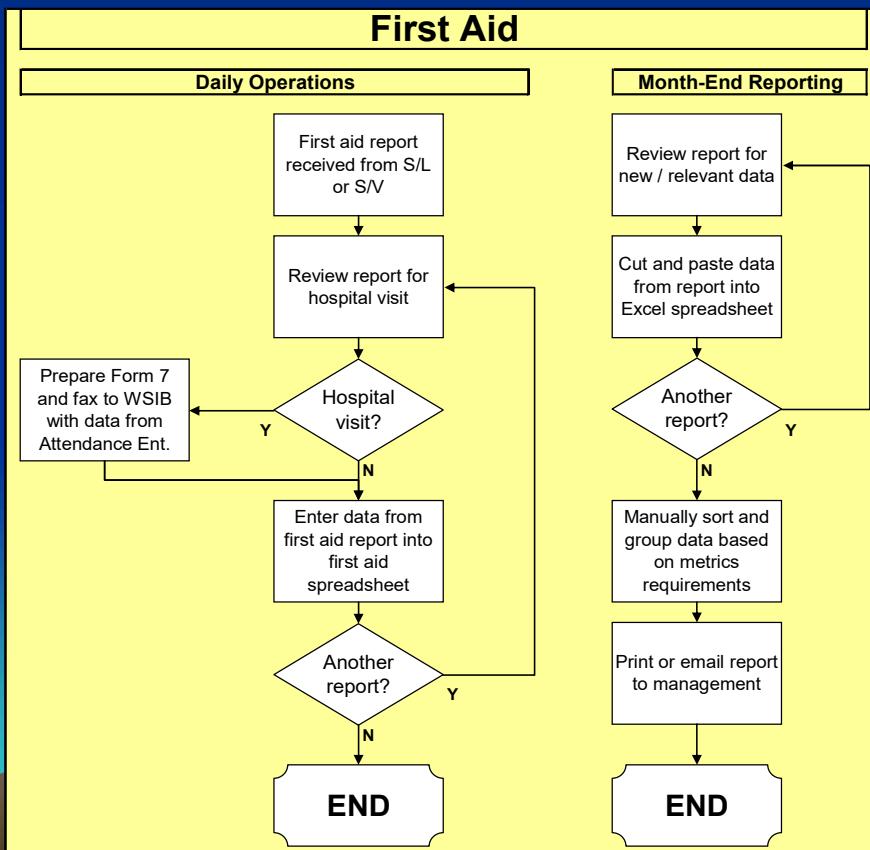
Step 5- Situation Description & Analysis

- **Scoring:**
 - 1 Point: Team described **current situation with photos/drawings, layout/flowchart and process characteristics**
 - 2 Points: Team identified **improvement opportunities**
 - 3 Points: Team identified **improvement opportunities and how current situation would be measured**
 - 4 Points: Data **collected and analyzed with stakeholder involvement**
 - 5 Points: Team **achieved and exceeded all the guidelines**



Step 5- Situation Description & Analysis

- Determine the best method for visually describing the current situation:



PROCESS DESCRIPTION - 5 associates/5 stations

- Raw cast parts are delivered by forklift to process #1
- Parts are machined at process #1 then transferred to process #2
- Parts are picked up by forklift from process #2 and delivered to process #3
- Machining occurs at process #3 then process #4
- All parts are transferred by conveyor to the final inspection process
- Finished parts are picked up by forklift and delivered to the next area
- Each process must perform a QC check every 20 parts

Step 5- Situation Description & Analysis

- Once the team has a visual description a data description of the current situation is required
- To focus on the correct data go back to the project statement and ask:
 - What are the improvement opportunities related to the teams' desired accomplishment
 - How will the current situation of these opportunities be measured?
- The answers to the questions will become the data description; display the data in appropriate graphs

Step 5- Situation Description & Analysis

Project Statement
The Office Monkeys' goal is to select and implement an Human Resources Information System to improve the quality, delivery and timeliness of critical human resources data by April 1st, 2008
Business Initiative
The goal of this initiative is to reduce duplicate entries, manual inputs and calculations and to improve response time to associate and management requests for data
What are the improvement opportunities related to this business initiative?
<ol style="list-style-type: none"> 1) Reduce duplicate entry of data points into different systems 2) Reduce excessive delays in reporting data due to searching for data and issues resulting from lack of cross training 3) Reduce the opportunity for errors due to manual inputs
How will the current conditions of these improvement opportunities be measured?
By quantifying the time and steps spent inputting data for each process flow

Data Process Flow	Calculation	Time Spent On	Number Of Manual
		Process Annually (hrs)	Steps
New Hire	50 associates/yr @ .75 hrs	37.5	7
Annual Attendance Bonus	Annually @ 24 hrs	24	7
Initial MHE Training	Monthly @ 1 hr	12	8
First Aid (Daily Incidents)	Weekly @ 5 hours	250	3
First Aid (Month End Report)	Monthly @ 2 hrs	24	4
Attendance Discipline	240 incidents annually @ .25 hr	60	10
Vacation Request (Inquiry)	10 inquiries/wk @ .1 hr	52	5
Vacation Request (Entry)	5 requests/associate annually/500 associates @ .15 hr	375	7
Ad Hoc Reporting	Various	208	4

Step 6- Goal(s) & Potential Benefits

- **What is involved?**
 - The team identifies the primary goals of the project and the benefits which should be expected once the project is completed
- **Why do this?**
 - To provide a project target from which to measure the project's degree of success



Step 6- Goal(s) & Potential Benefits

- **Scoring:**
 - 1 Point: Team identified goal(s) and documented on appropriate graph
 - 2 Points: Team identified goal(s), used graph, and documented ideal image but no description of potential benefits
 - 3 Points: Team identified goal(s), used graph, documented ideal image and described potential benefits
 - 4 Points: Team identified goal(s), used graph, documented ideal image and documented potential benefits on appropriate graphs
 - 5 Points: Team achieved and exceeded all of the guidelines



Step 6- Goal(s) & Potential Benefits#

- Write an “Ideal Image” statement:
 - Use the targeted improvement opportunities to develop a statement describing the situation after the improvement has been implemented

Ideal Image Statement

The HRIS system is an efficient and easy to use program that consolidates HR systems reducing overtime, manual data entry and calculations, improves scheduling, access as well as the quality delivery and timeliness of critical HR data. This in turn provides a better decision making tool for Associate Services/Production Support



Step 6- Goal(s) & Potential Benefits

- Using the “SMART” method, determine a logical goal for the team to meet:

S	pecific	Addresses the opportunity for improvement within AS/PS department
M	easurable	By time trials and revised process flow
A	ttainable	By reducing manual inputs and calculations
R	elevant	Target addressed concerns of external audits/ business plan
T	rackable	By comparing results to current data

Step 6- Goal(s) & Potential Benefits

Ideal Image Statement

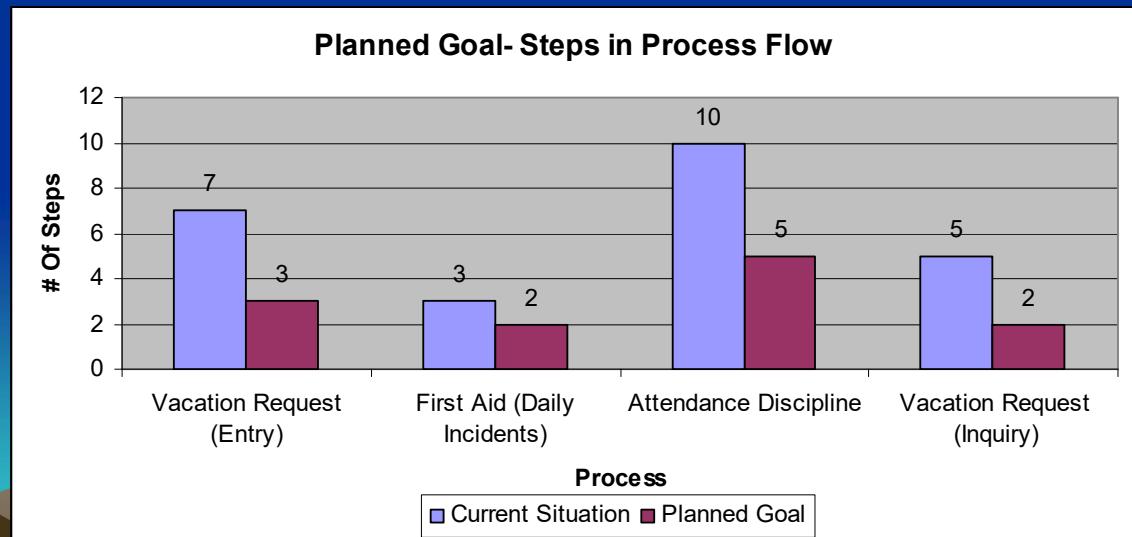
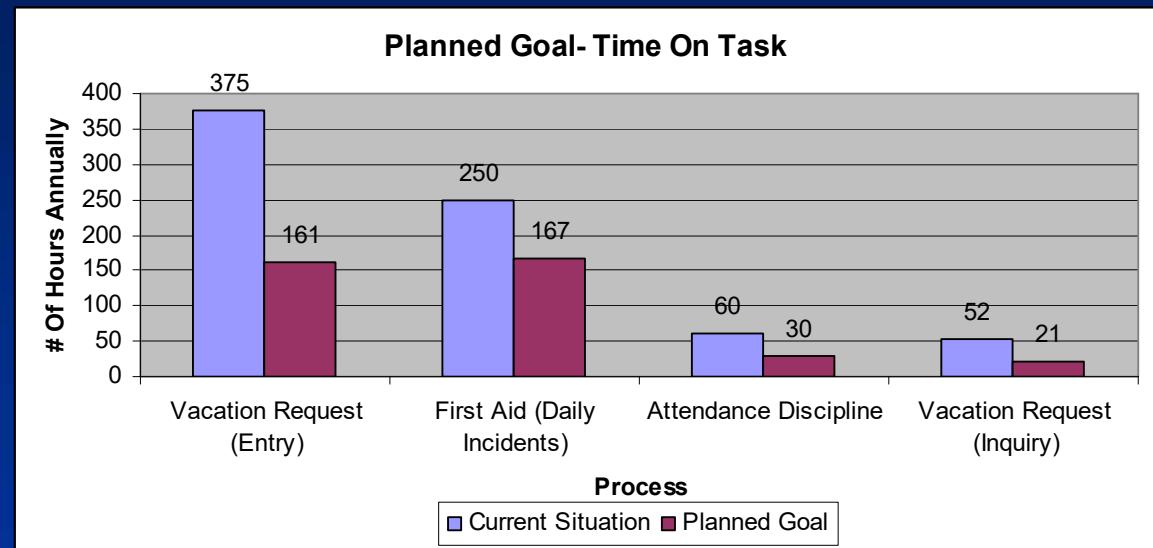
The HRIS system is an efficient and easy to use program that consolidates HR systems reducing overtime, manual data entry and calculations, improves scheduling, access as well as the quality delivery and timeliness of critical HR data. This in turn provides a better decision making tool for Associate Services/Production Support

Data Process Flow	Time Spent On Process Annually (hrs)	Number Of Steps	Time Spent On Process Annually Goal (hrs)	Number Of Steps Goal
Vacation Request (Entry)	375	7	161	3
First Aid (Daily Incidents)	250	3	167	2
Attendance Discipline	60	10	30	5
Vacation Request (Inquiry)	52	5	21	2
Totals	737	25	378	12

Primary Goals are 51% Reduction in both time on task and the number of steps

Step 6- Goal(s) & Potential Benefits

- Display the goal(s) on appropriate graphs



Step 7- Objective Development

- **What is involved?**
 - The team develops selection objectives, collects input from affected stakeholders, develops improvement ideas and identifies the best improvement alternative
- **Why do this?**
 - To validate the selection of the improvement alternative and ensure that the best idea is chosen



Step 7- Objective Development

- **Scoring:**
 - 1 Point: Team provided minimal description of how objectives were developed
 - 2 Points: Team described objective development and showed process used
 - 3 Points: Team described objective development and showed process used, with thorough explanation
 - 4 Points: Team described objective development, showed process used with thorough explanation, and utilized stakeholder input
 - 5 Points: Team achieved and exceeded all of the guidelines



Step 7- Objective Development

- **Develop and list objectives that will influence the improvement choice on a MMR chart (Measurable, Mandatory, Realistic)**
- **Each objective is then determined to be a Must or a Want outcome of the project**



Step 7- Objective Development

- **Gather and document income from the affected stakeholders to discover any concerns or ideas that they may have**
- **Use surveys (graph results), pictures etc.**



Step 7- Objective Development

Objective	Must			Want
	Measureable	Mandatory	Realistic	
SQL or DB2 compliant	X	X	X	
Associate records to contain: name, birthday, address, SIN, hire date, health card #, employee #, department, emergency contacts	X	X	X	
Supplementary data: current pay rate, position, shift, progression steps, dependants, education	X	X	X	
"Other" info: vacation, attendance, training, certifications, discipline, performance management, recruiting, safety incidents	X	X	X	
Scan and attach (resumes, pictures, etc.)	X	X	X	
Health and safety (Form 7, WSIB)	X	X	X	
Safety equipment tracking (PPE, etc.)				X
Related MHE and licensing	X	X	X	
Ad hoc reporting	X	X	X	
Interface with payroll, AE, NAVision	X	X	X	
Confirm scalability (max employees)	X	X	X	
Swipe access tracking and auditing				X
Security to control access to data at dept. and shift levels	X	X	X	
Electronic signoff/authorization of overtime	X	X	X	
Interface to swipe access system				X
Automated quarterly, annual attendance bonus and personal day payout calculations	X	X	X	
Organizational chart generation	X	X	X	
Export to flat file / PDF	X	X	X	
Job performance evaluations				X
Automated pay increase calculations with authorization	X	X	X	
"Mass update" of pay increases	X	X	X	
Asset tracking (cell phones, laptops, etc.)				X
Vacation day tracking - planned vs. actual	X	X	X	
Custom holiday entry	X	X	X	
Automated approval/denial of statutory holiday pay	X	X	X	
"Fuzzy logic" searching				X
Meets budget	X	X	X	
Must meet install deadline	X	X	X	
GUI Friendliness	X	X	X	
Maintenance / Support	X	X	X	

Step 8- Develop Improvement Alternatives

- **What is involved?**
 - The team brainstorms improvement alternatives
- **Why do this?**
 - To ensure that the team has several options for improving the situation



Step 8-Develop Improvement Alternatives

- **Scoring:**
 - 1 Point: Team provided minimal description of how alternatives were developed
 - 2 Points: Team described alternatives developed and showed process used
 - 3 Points: Team described alternatives developed, showed process used, and provided thorough explanation
 - 4 Points: Team described alternatives developed, showed process used, and provided thorough explanation, and utilized stakeholder input
 - 5 Points: Team achieved all of the guidelines and exceeded expectations



Step 8-Develop Improvement Alternatives

- Even though the team already may have an idea on how to improve the current situation, brainstorm several other alternatives
- Show the process on how the team came about the alternatives using the data and feedback from previous steps



Step 8-Develop Improvement Alternatives



Step 9- Decision Analysis

- **What is involved?**
 - The team weighs the pros and cons of each improvement alternative
- **Why do this?**
 - To ensure the team picks the best improvement alternative



Step 9- Decision Analysis

- **Scoring:**
 - 1 Point: Team provided minimal description of how alternatives were analyzed and best selected
 - 2 Points: Team described how alternatives were analyzed and best selected and showed process used
 - 3 Points: Team described how alternatives were analyzed, best selected, showed process used, and assessed risk of best alternative
 - 4 Points: Team used decision making tool correctly
 - 5 Points: Team achieved all of the guidelines by including stakeholders in the decision making process

Step 9- Decision Analysis

- Use a decision analysis worksheet to weigh alternatives against your musts and wants

	Current or Future Situation	Option #1	Option #2	Option #3	
	Select HRIS system that meets musts and as many wants as possible	AXENTIA	HR Technologies	ORACLE	
OBJECTIVES	meet budget	Go or NG	Go or NG	significantly over	Go or NG
	DB or SQL compliant	Go or NG	Go or NG		Go or NG
	scalability	extra\$ over 300 people	Go or NG	Go or NG	Go or NG
	ad hoc reporting		Go or NG	Go or NG	Go or NG
	interface with payroll	extra\$	Go or NG	extra\$	extra\$
	controls access to data		Go or NG	Go or NG	Go or NG
	track associate data		Go or NG	Go or NG	Go or NG
			☒	☒	☒
WANTS	track assets	Y	Y	Y	
	interface with swipe access system	N	Y	Y	
	"fuzzy logic" searching	N	N	Y	
	Judgement:	N	Y		N

Step 9- Decision Analysis

- Use any other methods possible to also weigh each alternative against each other

	Company	Questions for Niagara Office	Kraus Carpets & Floorings
	~ ~		
	~ ..		
1	What was installed. Products and version?	Payroll	Attendance Enterprise 1.028, Payroll Pro
2	How many associates in HRIS, how many users/ licenses?	100 licenses bought, 10 people using the system daily, 20 total users including accounting, supervisors, etc.	Approximately 20 for AE & OD & 3 for Payroll
3	Complexity of System?	lots of custom set ups to make the payroll run as required.	Their payroll is quite complex, 2 different union contracts to deal with and different bonuses and other incentives
4	When did you go live?/ And if mid year how were gov't remittances handled	Oct 1st, 2007, brought EI, CPP totals over from previous system, took from legacy over to Navision, Navision did not do it for them, they had to somehow trick the system and then Navision put through an extra fee for service.	Fall of 2005 for AE & PP, currently installing Odessey HR & plan to go live July 2008

Step 9- Decision Analysis

- **Based on your investigations choose an improvement alternative for implementation and list any possible risks/consequences**

DECISION STATEMENT:	Select HRIS system that meets musts and as many wants as possible
BEST OPTION:	HR Technologies
RISKS	ADVERSE CONSEQUENCES
Hidden costs	approach senior management for more money



Step 10- Planning Implementation of Best Alternative (PDCA-PLAN)

- **What is involved?**
 - The team develops a detailed plan for the implementation of the improvement
- **Why do this?**
 - To ensure that all aspects of the implementation are considered and laid out in such a way that the implementation should run smoothly with the end result meeting the project objectives



Step 10- Planning Implementation of Best Alternative (PDCA-PLAN)

- **Scoring:**
 - 1 Point: Team described implementation plan
 - 2 Points: Team showed and explained implementation plan (employing 5Ws-1H or other appropriate method)
 - 3 Points: Team clearly explained the scheduling of resources and deliverables
 - 4 Points: Same as above with explanation of stakeholder involvement
 - 5 Points: Team achieved and exceeded all guidelines

Step 10- Planning Implementation of Best Alternative (PDCA-PLAN)

- Prepare a detailed implementation plan and identify any required tests or trials

Project #9857		OHR / PayPro Implementation Plan Simcoe Parts Service <i>DRAFT</i>					HR Technologies Inc.	
ID	Task Name	Duration	Start	Finish	Predecessor	Resource Names		
1	OdysseyHR & Payroll Professional Implementation Project	175.5 days	Fri 4/4/08	Fri 12/5/08				
2	Client to authorize System Licence Agreement	0 days	Fri 4/4/08	Fri 4/4/08		SPS,HRT		
3								
4	Hardware	0 days	Fri 4/4/08	Fri 4/4/08				
5	Update Hardware & Software (if required)	0 days	Fri 4/4/08	Fri 4/4/08	2	SPS		

99 Programming
• Programming begins only once the Authorized Work Order is received by HRT.

100 HRT Internal Testing
• HRT to conduct internal testing of the program.

102 Delivery/Training
• HRT to deliver and provide required training on the Interface.

Step 10- Planning Implementation of Best Alternative (PDCA-PLAN)

- Develop a Gantt chart to chart the implementation progress
- Identify any potential problems in the plan and develop action plans for dealing with them if they should arise
- Prepare a one page summary of your plan to submit to management for approval



Step 11- Testing and/or Implementation (PDCA-DO)

- **What is involved?**
 - The team carries out the implementation according to plan
- **Why do this?**
 - To document and monitor the implementation



Step 11- Testing and/or Implementation (PDCA-DO)

- **Scoring:**
 - 1 Point: Team described improvement with superficial explanation
 - 2 Points: Team documented and monitored the implementation process
 - 3 Points: Team clearly explained and described test /implementation using data, photo, drawings
 - 4 Points: Same as above with explanation of any obstacles encountered
 - 5 Points: Team achieved and exceeded all guidelines



Step 11- Testing and/or Implementation (PDCA-DO)

- **Carry out the implementation plan:**
 - Have an RU READY meeting with all involved in the implementation
 - Confirm responsibilities
 - Review plan
 - Review documentation procedures
 - Review associate feedback method and target audience



Step 11- Testing and/or Implementation (PDCA-DO)

- Document all aspects of the implementation
- Retain all documents relevant to the implementation
 - Trial SPOS
 - Pictures
 - Surveys
 - Announcements



Step 12- Implementation Verification (PDCA-CHECK)

- **What is involved?**
 - The team checks the improvement results against the objectives
- **Why do this?**
 - To determine if the improvement was successful and confirm that all tasks are completed



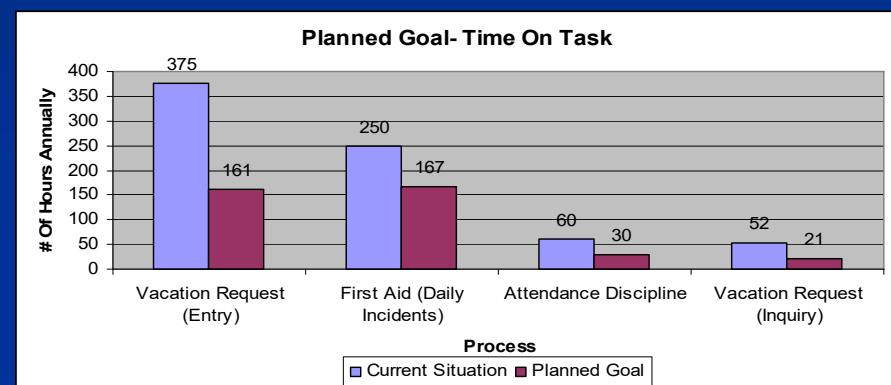
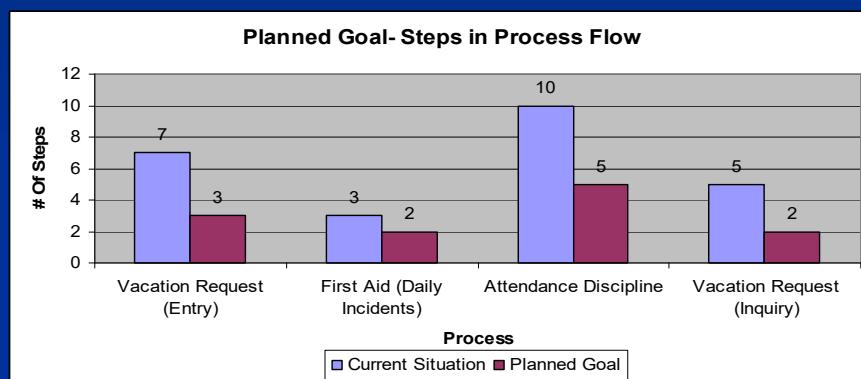
Step 12- Implementation Verification (PDCA-CHECK)

- **Scoring:**
 - 1 Point: Team verified improvement with superficial explanation
 - 2 Points: Team confirmed tasks were completed but were inadequately displayed graphically
 - 3 Points: Team confirmed tasks were completed, checked result against primary objective, and documented on graph
 - 4 Points: Team confirmed tasks were completed, checked result against primary objective, documented on graph, with stakeholder involvement
 - 5 Points: Team achieved and exceeded all guidelines



Step 12- Implementation Verification (PDCA-CHECK)

- Using the tools used to quantify the pre-implementation situation, compare the planned versus actual results



Data Process Flow	Time Spent On Process Annually (hrs)	Number Of Steps	Time Spent On Process Annually Goal (hrs)	Number Of Steps Goal
Vacation Request (Entry)	375	7	161	3
First Aid (Daily Incidents)	250	3	167	2
Attendance Discipline	60	10	30	5
Vacation Request (Inquiry)	52	5	21	2
Totals	737	25	378	12

Step 13- Implementation Standardization (PDCA-ACT)

- **What is involved?**
 - The team standardizes the improvement
- **Why do this?**
 - To ensure the improvement will remain in place and that all relevant documents reflect the change



Step 13- Implementation Standardization (PDCA-ACT)

- **Scoring:**
 - 1 Point: Team identified standardization with superficial explanation
 - 2 Points: Team identified standardization but did not communicate improvement to stakeholders
 - 3 Points: Team standardized improvement into daily operations and communicated to all stakeholders
 - 4 Points: Same as above with stakeholders involved in the process
 - 5 Points: Team achieved all of the guidelines below and excelled at horizontal implementation (across organization)

Step 13- Implementation Standardization (PDCA-ACT)

- Once the implementation is deemed successful it must be standardized throughout the organization
 - Train associates as needed
 - Update any relevant documents (SPOS, process guides, EMGs etc)



Step 14- Comparison Summary

- **What is involved?**
 - The team summarizes their project and reflects on the activity
- **Why do this?**
 - To identify the impact that the project has had on the business plan and the team members



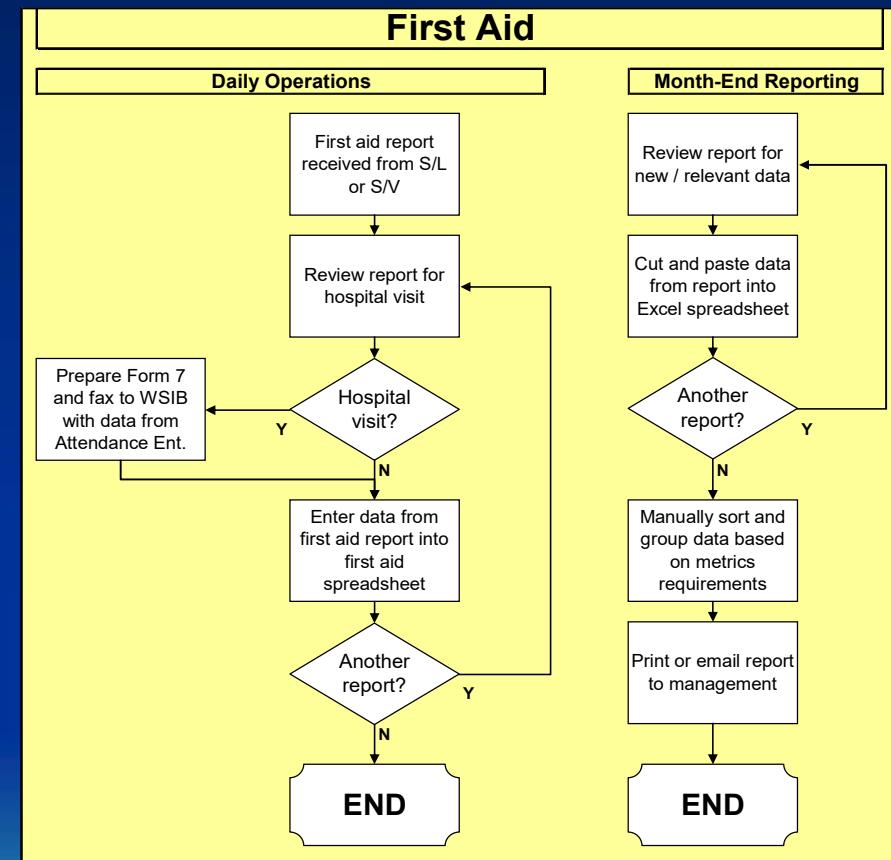
Step 14- Comparison Summary

- **Scoring:**
 - 1 Point: Team compared before and after condition with little or no visual aid
 - 2 Points: Team compared before and after condition with photos and/or drawings
 - 3 Points: Team compared before and after condition with photos/drawings, layout, flow chart, etc.
 - 4 Points: Team compared before and after condition with photos/drawings, layout, flow chart, and process characteristics
 - 5 Points: Team achieved and exceeded all of the guidelines



Step 14- Comparison Summary

- Using the tools from step 4 that demonstrated the “before implementation” compare the “after implementation” state



Step 14- Comparison Summary

- **Assess tangible, intangible and unexpected benefits identified in Step 5**

What are the improvement opportunities related to this business initiative?

- 1) Reduce duplicate entry of data points into different systems
- 2) Reduce excessive delays in reporting data due to searching for data and issues resulting from lack of cross training
- 3) Reduce the opportunity for errors due to manual inputs

- List any benefits to the team as well as any unexpected benefits
- Do a “Return on Investment” analysis to show the cost of the project vs the savings



Step 15- Activity Plan (Plan Vs Actual)

- **What is involved?**
 - The original activity plan is checked against the actual timing of the circle
- **Why do this?**
 - To comment and explain any deviation from the original plan



Step 15- Activity Plan (Plan Vs Actual)

- **Scoring:**
 - 1 Point: Activity plan showing planned vs actual presented
 - 2 Points: Detailed activity plan showing planned vs actual presented with any gaps explained



Step 15- Activity Plan (Plan Vs Actual)

- As each step in the circle is completed it is plotted on the activity plan developed in step 3.

STEP # AND DESCRIPTION	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV
1. Team Development	Yellow	Green							
2. Reason For Theme Selection	Yellow	Green					Planned	Actual	
3. Activity Plan	Yellow		Green						
4. Data Collection For Current Situation Analysis	Yellow	Used Existing Data	Green						
5. Root Cause Analysis	Yellow	Blue	Green						
6. Root Cause Identification	Yellow	Lost time analyzing and identifying root cause	Green						
7. Goal Setting	Yellow	Blue	Yellow	Blue	Green				
8. Countermeasure Selection And Prioritization	Yellow	Blue	Yellow	Blue	Green				
9. Countermeasure Planning	Yellow	Blue	Yellow	Blue	Green				
10. Countermeasure Testing	Yellow	Blue	Yellow	Blue	Green				
11. Countermeasure Verification	Yellow	Blue	Yellow	First C/M unsuccessful: PDCA circle repeated for 2nd C/M	Green	Blue	Yellow		
12. Countermeasure Standardization	Yellow	Blue	Yellow	Blue	Delays in obtaining approvals	Blue	Yellow		
13. Data Comparison Summary	Yellow	Blue	Yellow	Blue	Yellow	Blue	Yellow	Red Box	
14. Planned Goal Vs. Actual Results	Yellow	Blue	Yellow	Blue	Yellow	Blue	Yellow	Red Box	Several sessions this week to complete steps
15. Activity Plan (Planned Vs. Actual)	Yellow	Blue	Yellow	Blue	Yellow	Blue	Yellow	Red Box	
16. Project Benefit (Impact Analysis)	Yellow	Blue	Yellow	Blue	Yellow	Blue	Yellow	Red Box	
17. Overall Tool Usage/Project Presentation	Yellow	Blue	Yellow	Blue	Yellow	Blue	Yellow	Red Box	

Step 16- Project Benefit/ Impact Analysis

- **What is involved?**
 - Team members identify any new or improved skills acquired through participation in the circle as well as any obstacles or opportunities that were encountered
- **Why do this?**
 - To show the impact of participating in the circle process on the individual associates



Step 16- Project Benefit/Impact Analysis

- **Scoring:**
 - 1 Point: Team assessed impact to potential benefits with minimal explanation
 - 2 Points: Team assessed impact to potential benefits with adequate explanation and appropriate graph usage
 - 3 Points: Same as above with explanation of team & stakeholder involvement in the process
 - 4 Points: Same as above with explanation of team & stakeholder involvement in the process, and any negative aspects of the project
 - 5 Points: Same as above with explanation of team & stakeholder involvement in the process, and any negative aspects of the project

Step 16- Project Benefit/ Impact Analysis

- **Identify, explain and display and new or improved skills developed during the circle**
- **Identify and display any obstacles or opportunities that strengthened the team**

Team Member Development Chart	
Team Member	What Skills Did We Learn/Improve On?
Jimmy	Quality tools, better organization, public speaking
Jackie	Investigation skills, team work, computer skills
Jenny	Leadership, quality tools, team work
Joey	Public speaking, investigation skills computer skills
Ed	Quality tools, computer skills, public speaking

Step 16- Project Benefit/ Impact Analysis

- Identify, explain and display any costs associated with the circle, from overtime costs to countermeasure implementation costs i.e.

Of Meetings X # Of Members X Attendance Rate = Labour Cost

Labour Cost + Material Cost = Activity Cost



Step 16- Project Benefit/ Impact Analysis

- In this step a wrap up of stakeholder involvement as well as acknowledgement of any other associates that assisted the team in the circle is appropriate



Step 17a- Various Items: Overall Tool Usage

- **Scoring:**
 - 1 Point: Tools used with no discussion or explanation
 - 2 Points: Tools used to show and explain data and current situation; Decision Analysis, Tree Diagram testing/results; limited explanation or difficult to follow
 - 3 Points: Appropriate tool usage including labelling
 - 4 Points: Appropriate tool usage with clear explanations of the data represented by the tool
 - 5 Points: Appropriate tool usage with clear explanations on why the tools were used to represent the data



Step 17b- Various Items: Project Presentation (Duties Shared)

- **Scoring:**
 - **1 Point:** Superficial explanation of team members participation in presentation
 - **2 Points:** Teamwork evident by all team members in presentation
 - **3 Points:** Teamwork evident by all team members in presentation and throughout project



Step 17c- Various Items: Presentation Easily Understood

- Scoring:
 - 1 Point: Presentation confusing but main idea understood
 - 2 Points: Presentation had good flow, was easy to understand but some parts could have been presented more effectively
 - 3 Points: Presentation had good flow, was easy to follow where someone with no knowledge of the business could understand the what was being discussed (i.e. specialized equipment, processes, acronyms, etc)
 - 4 Points: All guidelines met and exceeded