Streamlining Processes and Workflows for Better Business Practices

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• Efficiency is a key component to successful business practices. Learn how to redefine and break down workflows and successfully implement improvements. Learn what process mapping and value stream mapping are, the difference between them, and how to effectively use both in your business.

• Learning objectives:
  – Identify the key business flows in your business and what factors are slowing progress.
  – Differentiate between process mapping and value stream mapping.
  – Show employees how to contribute to the success of the process.

What is your current role in your business?
Understand where you are

• What are the key business processes (flows) for your business?

• What documentation do you have for your key business processes?

• How do you improve upon these business processes?

What are your key business processes?

- YE Testing
- Loans / Distributions
- Form 5500
- Contribution Calculations
- Notices
What documentation do you have?

- Manuals
- Visio Workflows
- Video trainings
- In your head?

How do you improve processes?

- Client Demand
- Daily change – front line EEs
- Leadership Review
My Experience

Whose perspective....

From ours...

Or the clients?
Lean Operations

• What is lean?

• For the Service Industry?

Value Stream Mapping

By Karen Martin and Mike Osterling

Prepare and engage leadership in the transformation process
Gain a deep understanding about current work systems and the related barriers to delivering value
Design a future state that enables outstanding performance
Adopt the new design and lay the foundation for continued improvement
Value Stream Mapping

Wherever there is a request and a deliverable, there is a value stream

A macro perspective – Provides the means for leadership to define strategic improvements to the work flow vs. a process-level mapping enables people who do the work to design tactical improvements.
Value Stream Mapping

Reflect work flow as a customer experiences it versus the internal focus of typical process-level maps.

Rethinking Tool
Visual Unification Tool

Other Benefits:

- Practical Means to Drive Continuous Improvement:
  - Plan – Do – Study – Adjust
  - Post maps in strategic (visual) locations – Stand-up Meetings

- Orient New Hires
Value Stream Mapping

What VSM is Not:

• Using mapping solely as a work design exercise
• Using the map to make tactical improvements
• Using mapping during a Kaizen event
• Using mapping with no metrics

Value Stream Mapping

VSM Is -

– Information Flow
– Work Flow
– Time Line
Value Stream Mapping

VSM Objectives –

Understand the current state of each Key Operational Process

Identify Value and Waste

Map a future state of common Key Operational Processes

Tips for a Successful Value Stream Map

✓ Have all involved parties study the process

✓ Identify attendees, including the executive sponsor and facilitator

✓ Set rules for the group (and follow them)

✓ Block out at least 2 days (1 for current state and 1 for future state)
Mapping Agenda

Prior to Prep Day
1. Read Value Stream Mapping book
2. Create preliminary current state map
3. Socialize process with teams/departments
4. Ensure front line teams that will participate in value walks know what to expect

Prep Day
1. Review and refine charter
2. Share preliminary map drafts and develop rough draft maps as a group
3. Determine what data will likely need to be obtained and begin data gathering if appropriate

Current State Map Day(s)
1. Do first gemba walk
2. Draw current state map
3. Determine what data to acquire

Repeated for Each Department
4. Do second gemba walk
5. Refine map and calculate metrics which should include (at minimum):
   a. Riced XCEA
   b. Total process time and total lead time
   c. Activity ratio
6. Briefing

VSM – Rules for a Gemba Walk

1. Act like we don’t know what’s really happening on the front lines–because we usually don’t!
2. Don’t be patronizing
3. Use listening skills!
4. Don’t attempt to solve problems or make suggestions
5. Don’t judge
6. Be grateful
7. We’re learning how work flows through a system (we’re not assessing the people or process)
VSM – Value Mapping

Value Stream Mapping
VSM – Mapping the Current State

- Determine the “right work”
  - Eliminate delays, eliminate waste, improve quality, reduce cost, reduce labor effort, reduce frustration
  - Removing steps
  - Adding steps

- Make work flow - Make work flow effortlessly across the value stream
VSM – Mapping the Future State

VSM – Future State Map
VSM – Future State Map

Grand Total: Current
- LT: 118 hours
- PT: 2.2 hours
- Activity Ratio: 1.8%
- Rolled %C/A: 58.3%

Grand Total: Projected Future
- LT: 12 hours
- PT: 2 hours, 40 minutes
- Activity Ratio: 25%
- Rolled %C/A: 90%

Grand Total: Projected Improvement %
- LT: 91%
- PT: -18%
- Activity Ratio: 1390%
- Rolled %C/A: 54%
Process Mapping

• Zoom in on areas identified in the Value Stream Mapping Process

• All about the details
The Current State Process Map is created in 3 phases:

1. Map/Define the process
2. Add Key Metrics to each step
3. Differentiate Value add from non-value add activities

Tools, not rules

Adjust to make it fit your company
Free Webinars Online

  – Value Stream Mapping In Office & Service Environments
  – Lean 101 for Office & Service
  – Value Stream Mapping: What To Do Before You Dive In