

Step 1: Initiate



- Understand BPI method
- Start Up
- Develop the Project Charter
- Form Team
- Manage Project

UNDERSTAND BPI METHOD

What is UCSF's BPI method?

- UCSF's **Business Process Improvement** (BPI) follows a proven five-step model that empowers small and medium-sized work groups to define, assess, and improve inefficient business processes
- Using the BPI Toolkit provided on UCSF's BPI website (<http://improve.ucsf.edu>), teams can work to autonomously improve specific business processes
 - **Improve.ucsf.edu** hosts materials, captures project updates, and provides recognition for successful BPI initiatives
 - Links to **BPI Chatter**-- a community for staff participating in BPI efforts to collaborate with one another
 - Create **UCSF Box** folder to share documents with the project team

Key Activities of a BPI project

BPI Step	Key Activity
Initiate	<input type="checkbox"/> Project lead uses criteria to select a process that needs improvement
	<input type="checkbox"/> Project lead initiates and manages the project
	<input type="checkbox"/> Identify process owner, stakeholders, process participants
	<input type="checkbox"/> Form a project team to learn BPI and conduct the BPI work
	<input type="checkbox"/> Develop a project charter
	<input type="checkbox"/> Create project schedule
Explore	<input type="checkbox"/> Map and measure the current state
	<input type="checkbox"/> Assess the process from the customer's perspective
Improve	<input type="checkbox"/> Based on root causes of issues, identify list of improvements
	<input type="checkbox"/> Obtain decision on changes to pursue
	<input type="checkbox"/> Develop future state
Implement	<input type="checkbox"/> Create implementation plan and schedule
	<input type="checkbox"/> Implement the changes
	<input type="checkbox"/> Manage the changes
	<input type="checkbox"/> Monitor new process

Tips for success!

- Display visible buy-in from leadership
- Commit enough resources
 - Schedule adequate time
 - Free up participant time to focus on the work
- Establish ground rules for the team
- Use a facilitator to guide the project meetings and document action items between sessions
- Maintain momentum
- Manage the change



START UP

Start up your BPI project

How do I identify a process that needs improvement?

Consider...

- Broken processes
- Processes critical to my customer
- Problems that may have been identified via:
 - organizational assessments
 - staff engagement surveys
 - customer complaints



Early project selection criteria

How do I select a process for my BPI project?

Rate your potential BPI projects by the following criteria:	Yes	Medium	No
Does the process consume too many resources or have quality, cost, or delivery problems?			
Can the process be mapped?			
Does the process have defined boundaries?			
Does the process have specific performance expectations?			
Does it have value that is worth the time and effort to improve?			
Is it a rapid impact project (low hanging fruit) with a short duration?			
Is the scope of the problem small to moderate?			
Does the process have clear ownership?			
Will leadership endorse it?			
Is it an area with strong organizational support?			

Common issues leading to project failure

- Too large
 - Biting off more than you can chew
 - Not enough resources to successfully complete the project
- Too small
 - Projects with an insignificant increase in value
- Known solution
 - “Just do it” projects that simply need project management, not BPI
- Lack of data and/or expert knowledge of the process
- Inadequate resources (time, key participants)
- Politics (pet projects, lack of buy-in)



Common predictors of BPI project success

- Strong project leadership
- Stakeholders are willing to try new solutions
- Appropriate team members are available
- Management commits resources to solution
- Sufficient reasons for change
- Project is capable of completion within several months
- Knowledgeable advisor is available to help team



DEVELOP THE PROJECT CHARTER

Articulate scope

- Articulate the scope and objectives of the process and the BPI project via the project charter



- What is a charter?
 - Document that articulates the project scope and other key elements
- What is scope?
 - Clearly defined process boundaries and objectives
 - In scope / out of scope

Draft the project charter components

- Process description
- Process scope with defined boundaries (in scope / out of scope)
- Problem statement
- Known issues and impacts
- Project goals, objectives, and anticipated benefits
- Process owner
- Stakeholders, project participants, and their roles
- Project schedule



Note: It is common to update the charter if elements change over time

Charter sample

1. Project Name: <i>Describe the work to be done in a way that is easy to remember.</i>			
2. Process: <i>Brief description of the process to be improved</i>			
3. Project Goal and Anticipated Benefit: <i>What does the project hope to achieve?</i>			
4. Process Owner: <i>Organizational owner of the business process and BPI champion. Provides resources, guidance and commitment.</i>			
5. Preliminary Ideas about Data Needed: <i>Use available data and/or create simple tools to collect needed information (e.g. how long it takes, who uses, complaints, comparisons, etc.)</i>			
6a. Core Team Members:		7. Project Lead: <i>Guide the team; act as change agent; represent the project</i>	
		8. Team Facilitator: <i>Apply BPI steps and techniques (e.g. map the current state); obtain active participation from all members</i>	
6b. Others (e.g., SMEs, customers, etc.):		9. Scribe: <i>Document process; capture results; record findings</i>	
10. Challenges / Problems with current process: <i>Brief description of some of the challenges facing customers and/or stakeholders.</i>			
<input type="checkbox"/> Too Costly <input type="checkbox"/> Takes too long <input type="checkbox"/> Too many "hands" <input type="checkbox"/> Volume of Work <input type="checkbox"/> Missed deadlines <input type="checkbox"/> Too many errors <input type="checkbox"/> Other _____			
11. Expected measures of succes: <i>When you look back on the effort, what are signs that it was successful?</i>			
12 Scope: <i>What is included? What is NOT included in the review?</i>			
13. Proposed Schedule (high level)			
Task	Start Date	End Date	Responsible Party

Charter Evaluation

After you complete a draft of the charter, evaluate the goal statement. Is it S.M.A.R.T?

- **Specific**
 - Does it address a real business problem?
- **Measurable**
 - Are you able to measure the problem, establish a baseline, and set targets for improvement?
- **Attainable**
 - Is the goal achievable? Is the project completion date realistic?
- **Relevant**
 - Does it relate to a business objective?
- **Time Bound**
 - Have you set a date for completion?

FORM TEAM

Form a team

- Key people involved in the process must participate on the project team in order to develop a complete and accurate picture
- Depending on the project, a core team is typically around 4 - 7 people; an extended team may exist as well
- Team members may include:
 - Internal department staff involved in the targeted business process
 - Subject Matter Experts (SMEs) from other departments or internally
 - Upstream process participants (suppliers)
 - Downstream process participants (customers)

Project Roles

- **Project Lead**
 - Guides the team; acts as change agent; represents the project; plans and attends all meetings
- **Process Owner**
 - Organizational owner of the business process and BPI champion; reviews and signs-off on implementation plan
- **Facilitator**
 - Applies BPI steps and tools (e.g. helps map the current state); obtains active participation from all members
- **Process Participants**
 - Representatives engaged in the process as part of their work
- **Subject Matter Experts (SMEs)**
 - People with specialized process knowledge; used as needed; this also includes customers and suppliers
- **Scribe**
 - Documents process; captures results; records findings

Notes:

- **Core team participant** roles include: Project Lead, Process Participants
- A team member can have more than one role
- Be sure to designate someone to manage logistics like scheduling meetings; this could be the project lead, participant, scribe or an outside administrator

Time Commitment

The availability of participants, desire to make improvements quickly, and other factors will influence how frequently to meet and how much time is required.



- Core team participants should meet at least weekly to generate and maintain momentum
 - SMEs, suppliers, and customers should be pulled in as needed
- Work will be expected outside the meetings
- Estimated time commitment for core team participants is 10 - 20% (1/2 to 1 day per week)
- Estimated time commitment for lead is 20 - 40% for the duration of the project
- Time commitment depends on overall project duration (# of weeks)

Meeting Facilitation help

- Many meeting facilitation guides exist. If you haven't facilitated a team before, consider looking at the “Resources” at improve.ucsf.edu
- You can also find support outside your department



MANAGE PROJECT

Tips for managing the project

- Ensure the project lead has authority to closely manage the project
- Develop a detailed schedule, particularly as it relates to team meetings (what, when, where, who)
 - Set up meetings in advance along with other logistics
 - Check schedule regularly to stay on track
- Leverage the project charter to guide the overall management
- Include necessary communications, status reports, and review meetings with key stakeholders

