

## **Process Streamlining Template**

Evaluate your process map and use the attached template to answer the follow questions.

### **What is the core purpose?**

Describe the core purpose of the overall process and each step in the process. Ask yourself, “What value does the procedure provide the organization?”

### **How long does each step take?**

List each step in the process, document how long it takes and the target cycle time. Then, if the process is running slower than targeted, describe why that might be in the Opportunities section.

### **How is the work being performed?**

Review the overall process as well as each task. Ask the following questions and document the opportunities for improved efficiency.

- **Dependency:** What steps are being done sequentially that could be done in parallel?
- **Necessity:** Is the task necessary? Can it be combined or eliminated? Should this activity be performed earlier or later?
- **Efficiency:** Are there frequently repeated steps? Is there shared responsibility for multiple approvals or controls?
- **Purpose:** How else could the core purpose of this process or task be accomplished?

### **What are the risks?**

Review the overall process as well as each task and document the risks of each step by asking the following questions.

- What has could go wrong at this step?
- What has gone wrong in the past?
- If this step is performed incorrectly, what is the outcome? Are the potential impacts high?

## Analysis Template

Name of Process:

Purpose of Process:

<b><u>Type of Analysis</u></b>	<b><u>Tasks Analyzed:</u></b> Document the tasks that are being performed sub-optimally	<b><u>Efficiency Opportunities:</u></b> Describe results of the analysis. Can tasks be run in parallel? Is the task necessary? Is the task repeated unnecessarily? Can the step be achieved in another way? Other noted inefficiencies?
Timing Analysis		
Common Sense Analysis		
Risk Analysis		
...		

## After Analysis, Identify Ways to Redesign

Review the analysis grid and highlight the tasks that are potentially high risk or low efficiency.

Using the ideas generated during analysis, can inefficient steps be redesigned by:

- Combining tasks?
- Adapting tasks?
  - Moving inspection points earlier in the process?
  - Reducing handoffs and controls?
  - Applying standards to the entire process?
- Running the tasks in parallel rather than serial?
- Eliminating tasks?
- Speed up tasks through technology or other innovation?
  - Move tasks to another process?
  - Automate tasks?
  - Correct endless loops?

If risks have been identified, can the process be changed by:

- Adding or modifying a step?
- Adding a control?
- Reordering the workflow?
- Instituting new training or skills development?
- Redesigning incentives?
- All of these together?