

Process Talk Through Best Practices

Focus: Remote Work

Lee Kuntz

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Our Agenda

- Meeting logistics
- About Lee Kuntz
- About tool: Process Talk Through
- Checklist:
<https://www.improveprocess.net/resource/>
- Q & A
- Survey to understand your next steps



It's transformational!

Beth Bull
Senior Vice President and CFO
Communities Foundation of Texas

About Lee Kuntz

Founder, president, process improvement trainer, coach, facilitator, strategist, and speaker, *Innovation Process Design*

Values: **Creating possibilities, disciplined rigor, shared success**

- Certified Lean Six Sigma Black Belt
- Human Centered Design Certificate
- Project Management Training
- MBA, *University of Minnesota*
- Advanced Communicator, *Toastmasters International*

Prior work experience: *Cargill, American Express*



Lee, you took what I thought was going to be a stringent, complex methodology and made it easy to understand and feasible to apply to our opportunities. Everyone participated and was thoroughly engaged in the process improvement training.

Kirk Wong
Vice President Finance

Importance of Process

Process Name	Payment Process
Steps	<ol style="list-style-type: none"> 1. Receive bill or grant request. 2. Review for completeness. 3. Review for legitimacy. 4. Enter into system. 5. Match screen to bill or grant for accurate entry. 6. Save entered data. 7. Send check to payee. 8. Save paperwork as electronic document. 9. Verify electronic document is seeable. 10. Shred original request documents.
Outcome	Accurately, authorize, legitimate and timely payment



The Change



About Process Talk Through

A forum to verify that the previously formulated work steps are being followed. A consistently followed process means uniform outcomes, unwavering quality, and delivering on promises.

Forum can also:

- Verify process works within the remote work environment
- Identify pain points
- Source improvement ideas

Process champion quote: “*Our process team can pull together and solve nearly anything within 30 minutes.*”



Organize Process Talk Through

1. Identify process and steps included
2. Identify employee—a process champion—to lead review
 - Organize, engage, facilitate, accomplish
3. Find most up-to-date process instructions
4. If none exist, champion drafts before meeting



Plan Process Talk Through

1. Identify purpose of meeting: Review and alignment on process in remote environment
 - Optionally: identify process improvement ideas
 - Optionally: determine low-hanging fruit to be implemented immediately
 - Optionally: plan to investigate, prototype, and/or pilot non-low-hanging fruit
2. Create meeting agenda
3. Schedule one-hour (at minimum) meeting including audio, camera view, document-sharing capability
4. Invite everyone who does process steps to join meeting



Facilitate Process Talk



Open process review meeting.

- Communicate purpose of the meeting
- Delineate process and steps included
- Clarify attendee responsibilities
 - Communicate how work is done
 - Hold steps in place
 - Achieve needed outcomes
 - Act as team

- Set a tone that supports learning and adapting
- Identify intended outcomes needed from the process
- Display the most current process instructions



Process Talk Through

Talk through current process instructions, having person who does relevant work step read and speak about step



Conclude Facilitate Process Talk

1. Discuss and conclude if steps work well or have gaps when done remotely
2. Solve issues and questions that come up—and they will come up
3. Conclude with open discussion: Will revised process deliver needed outcomes?

SOLVE IT!



Follow Up Process Talk

Update and share work instructions after meeting to reflect the learnings and agreed-upon, enhanced process

Before we open for questions, I know some may need to drop now. Would you take a minute to take 6 question survey when webinar ends?

Questions?

Contact Lee with questions – lee@improveprocess.net. 651-330-7076

