



Much of our work at USC involves processes that flow through multiple functions and locations. Process improvement projects can make these processes more efficient, effective, and user-friendly.

Roadmap for Process Improvement Projects

1. ADVANCE WORK

The first stage is about setting up the project for success. The **project sponsor** takes the lead, with guidance from the facilitator.

DEFINE THE SCOPE

Agree on the process to be improved, then further focus the scope by identifying the first and last steps of the process.

CREATE PROJECT CHARTER

The charter spells out key elements of the project. It gets everyone on track and moving in the same direction right from the start. Included:

- **Project Overview:** Background, purpose, scope, goals
- **Process Overview:** Macro map of the current process, customers, inputs, outputs
- **Data:** Initial data providing early insights into the current process
- **Participants:** Names of people who will fill key roles, including sponsor, team leader, team members, SMEs
- **Timeline:** General expectations

Facilitator Role

Guide the advance work • Ensure complete charter with clear scope

PROJECT CHARTER



A well-developed charter is essential to the successful startup of a process improvement project.

2. IMPROVEMENT SESSIONS

The improvement work gets done in a series of team sessions led by a **facilitator**. The work unfolds in the three phases described below.

1st phase: DISCOVERY

Review charter • Gather input from stakeholders • Develop map of the current process • Identify process waste and value-adding steps • Gather and study data to gain deeper insights into the process • Explore root causes

2nd phase: POSSIBILITY

Generate potential improvements: **immediate actions, short-term actions, longer-term actions** • Review in terms of effort/impact • Build consensus on go-forward improvements • Create map of the future-state process

3rd phase: PLANNING

Refine improvement set if needed • Develop implementation plans • Determine expected “before and after” impact • Finalize plans

Facilitator Role

Facilitate improvement sessions • At end, hand off to team leader (or other) to serve as project manager

TEAM BRIEFING



Teams sometimes conclude their work with a briefing for colleagues, stakeholders, and others. This adds to the forward momentum as team members go from being builders of the improvement plan to being proactive advocates.

3. IMPLEMENTATION

A **project manager** (typically the team leader or other team member) guides and coordinates implementation of the action plans.

AFTER LAST TEAM SESSION

Circulate a project summary that includes plans, future-state process map, and projected results

WITHIN 2 WEEKS

Create Gantt chart (or equivalent) showing planned improvement actions, point people for each, and time frames • Monitor progress and roadblocks • Take needed action to gain and maintain traction

+30 DAYS +60 DAYS

Convene team • Review progress relative to plan, projections, developments • Judiciously refine the plan as needed • Clarify next steps

+90 DAYS

Review progress • Discuss emerging factors that can help or hinder implementation • Review plans for the next three months

Facilitator Role

Provide implementation guidance • Be available to project manager