TrendSpotters:Process Walk

Process Walk Worksheet *By Carol Haig, CPT, and Roger Addison, CPT, EdD*

Phil Kirby is president and managing director of Organization Thoughtware International Inc. (OTI), based in Gulph, Canada, near Toronto. OTI operates at the process/work level to improve organization effectiveness through reductions in cycle time and associated costs. Our conversation with Phil, philipkirby@thoughtware.ca, is the third in our series of interviews with ISPI's 2011 Conference keynote speakers. Previously profiled in *PerformanceXpress* by Elaine Steiner, Phil contributes a key tool to the TrendSpotters Open Toolkit (TOT), the Process Walk, used by OTI to maximize performance improvement through the application of Lean manufacturing techniques. Lean manufacturing is an approach for eliminating waste, which includes all process steps that do not add value to the final product or service.

Genesis of the Process Walk

Phil's early work in manufacturing included Total Quality Management (TQM), re-engineering, and process control. Noting that none of these got to the heart of sustainable process improvement and change, Phil became interested in the Toyota production system and saw how Toyota Way techniques could be used to produce consistent process improvement in any industry. The Process Walk evolved into a core component in OTI's exploration of client process improvement opportunities. This is fitting because, as Phil says, "Opportunity is buried in process."

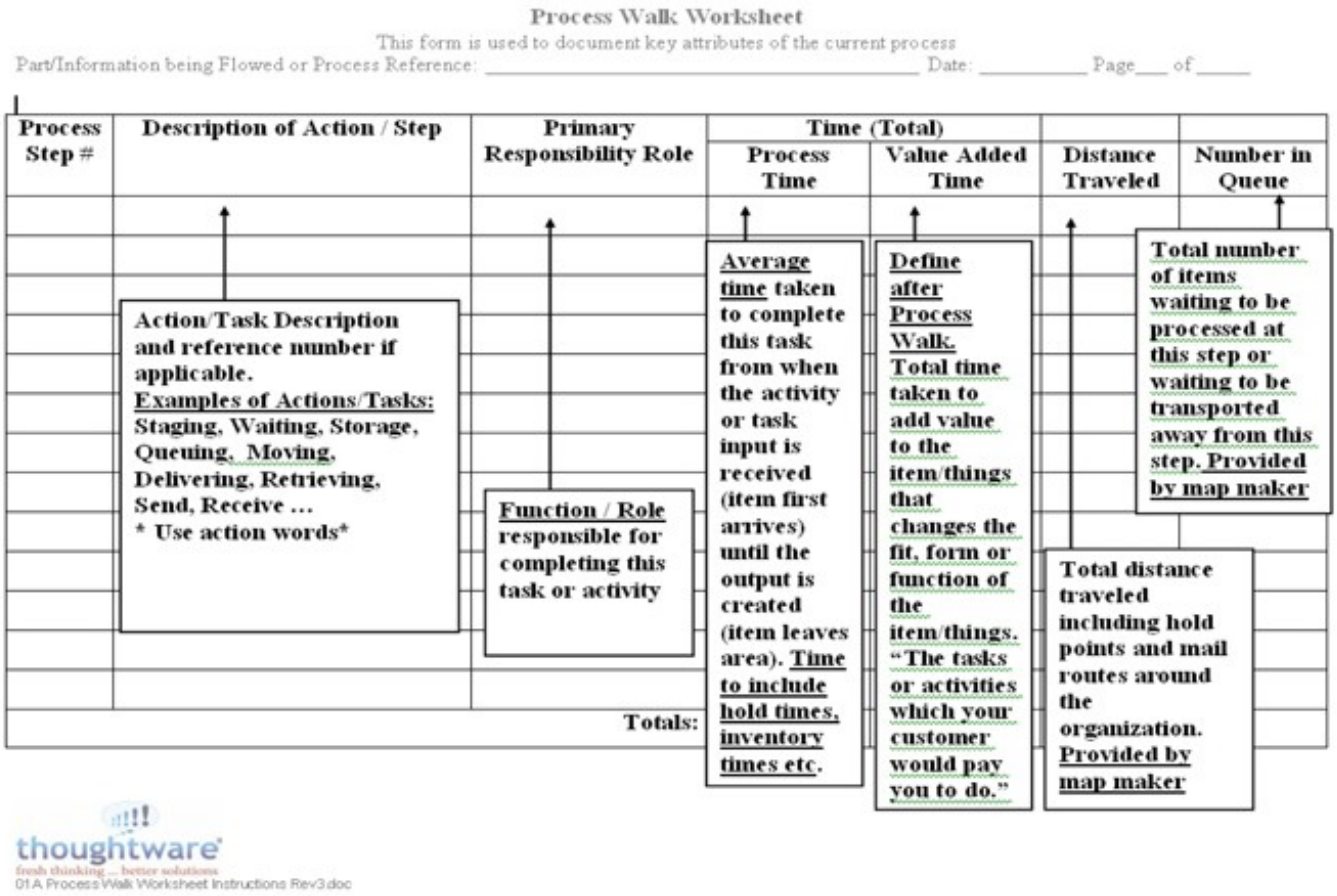
Description of the Process Walk

OTI describes the Process Walk as a "waste discovery technique based on direct observation." Think of it as observation on steroids. The Process Walk begins with a goal statement for the process under examination and is conducted by a team of four to six employees currently performing some portion of the process. Team members are each assigned a responsibility, such as tour guide/SME, scribe/author, wasteologist/ photographer, and so forth. They:

- Walk through the process, completing forms and taking photos, measuring time and distance covered, and mapping their route
- Meet to share what they saw
- Reconstruct the process without incurring additional costs and leave no waste when done

Below is one form used in the Process Walk.

Process Walk Worksheet Instruction



How to Use the Process Walk

Phil graciously shares a slide deck, ShortProcessWalk02-11.pdf, with more detail and additional worksheets to help us get started with a Process Walk.

Success Story

After the events of 9/11 and the increased vigilance that followed, the Canadian Passport Office was taking 12 to 14 weeks to process a passport application. OTI's team identified the business need: to reduce the turnaround time on passport applications with little or no budget increase in the examination area at 70 main and satellite locations and in two printing areas.

They examined the passport application process to improve it by identifying and removing waste–anything in a process that uses resources but does not add real value to the product or service.

The Passport Office batched applications for processing. Phil says, "Batching is the root of all evil because it hides blockages to flow." Flow is the sequence of steps in a process. To determine the blockages and identify resulting waste, OTI conducted a Process Walk. They observed that a worker put each application and its related components such as a photograph and proof of citizenship in an individual transparent envelope. The worker boxed the envelopes and loaded the boxes on a cart for transportation to another floor. There, an examiner opened each envelope to determine if the application was complete and the required components provided. The examiner refilled each envelope with its contents, and then filled the boxes and the cart. The next specialist received the cart, opened the envelopes, performed a task, and so forth. These steps repeated five times before the passport was ready for print. The printing process provided the same opportunities for improvement.

After the Process Walk, OTI set up a model production line to test the team's findings. It took just 30 minutes to process each application, handling one at a time. With this new setup in place, OTI determined the best process flow to keep the processing time to 30 minutes or less. Ultimately, they went to batches of five passport applications for best flow and process time: five days, including printing, versus the original 12 to 14 weeks. Specific waste elimination included:

- Reduced processing time by 91%
- Cut backlog, while volume was doubling, by 88%
- Increased productivity by 53%
- Reduced cost per application processed by 42%
- Freed up floor space by 48%
- Doubled volume without increasing headcount

Advice to Users
Phil suggests that we define a scope of process that is familiar, such as purchase order (PO) processing. To do a short Process Walk, go out and "be" the PO to see where it goes:

- Take photos of waste.
- Log elapsed time for when the PO languishes in someone's inbox for a week, for example.
- Count the number of steps you take on your journey as a PO and log these distances.
- Log the value-add, any activity that makes the product or service more like what a customer is willing to pay for, such as the second it takes to sign the PO.
- Determine how the PO process flow could be improved to produce zero waste.

Links to the Performance Technology Landscape
The Process Walk supports these principles of performance technology:

R	Focus on Results–The goal is an improved process flow with zero waste.
S	Take a System view–A process is a series of steps in a system that results in a valued product or service.
V	Add Value–Value-added steps are called out in a Process Walk.
P	Establish Partnerships–Employees who are part of a process participate in a Process Walk.

Application Exercise
Use the Process Walk to analyze a process in your organization as described in Advice to Users above. Choose a process you think will benefit from improvement and plan to implement your changes.

How Can Performance Improvement Practitioners Help Your Clients' Results?
The Process Walk is a particular type of observation suited to performance improvement opportunities on the Work/Process level. It provides a structured way to look at how work is performed. Performance improvement specialists can successfully combine HPT tools and techniques with Lean tools like the Process Walk to produce measurable process improvement.

Phil reminds us that simpler tools, like the Process Walk, are most effective. Just the act of conducting one can produce a 10% uptick in productivity. Proficiency in using Lean manufacturing tools like the Process Walk comes with building expertise-developing an eye for spotting waste and "learning to see" what you are looking for. Visit the OTI website, www.thoughtware.ca, for more about Thoughtware tools. See the Amazing Results section for inspiring

examples from client projects.

Find all the models and tools featured in TrendSpotters at www.ispi.org/archives/perfXpress.htm#trendToolkit.
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