Are Your Best Employees Your Biggest Risk?

Getting Vital Information Out of Their Heads and Into Writing

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MillerProductivity

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"If the process is right, the results will take care of themselves."

~Takashi Osada

Introduction

Each year companies that are not prepared lose much of their intellectual property and knowledge when long-time employees leave, are promoted, retire or die suddenly. Organizations don't take the time to thoroughly document the daily tasks and occasional activities that keep the business functioning.

Often, management doesn't even know what tasks need to be completed because the information is in the head of the employees and not written down for others to follow.

Does This Story Sound Familiar?

There he was, Mr. Business Leader, and he had a major problem and needed a fast solution. You see, he had two employees getting ready to retire a lot sooner than he expected and another employee was thinking about changing jobs and leaving as well. He had to figure out how to get the specialized knowledge out of their heads and into writing in order to keep his business growing.

The problem was he had no clue how he was going to do this. The thought of the retiring employees, with all of their specialized knowledge about *his* business, leaving without creating written procedure documents was enough to drive him mad.

To make things even worse, the employees were dragging their feet because they didn't think they had enough time to share their knowledge with the younger employees and still get the work done. All of this was contributing to Mr. Leader's feeling of frustration and stress. (It really felt like he was trapped in a tight spot with no easy way out!)

But, after some careful thought, research and inspiration, he found a solution. A respected member of his informal network told him about an experienced professional who was able to provide personal instruction, mentoring and coaching to his staff, teaching them what to do to create great documents FAST.

In fact, here are some of the details of what happened next.

The Process
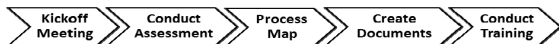
The following specific procedures to document and improve work processes were used.

1. Schedule Kickoff Meeting
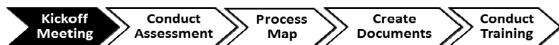
Before the team began to work with the staff, it was important to schedule and facilitate a kickoff meeting with everyone who was involved in this process. This ensured that everyone was fully aware of the documentation process and understood what was happening and why. This also allowed the staff members to ask questions

and hear the message directly from the
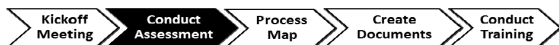executive team and the consultants.

2. Conduct Process Assessment

Kickoff Meeting › **Conduct Assessment** › Process Map › Create Documents › Conduct Training

Before beginning the process mapping
exercises, time was spent interviewing
employees and observing the activities in
the organization. The interviews helped to
identify the tasks that were performed and
their frequency. This allowed them to
gather information about the organization
and to create a list of areas for process
improvement. The team used this
inventory to prioritize their documentation
efforts.

3. Complete Process Maps

Kickoff Meeting › Conduct Assessment › **Process Map** › Create Documents › Conduct Training

Process Mapping is a valuable tool to help

identify the right course of action for your organization. It's a method of defining, studying and critiquing how work flows through your business. It's based on the simple premise: all organizations use a process to get the work of the organization completed.
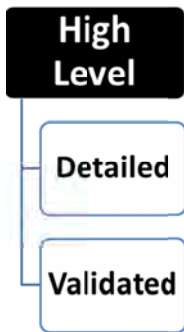
The team began with a *high-level process map* to identify all of the players in the process. As a team they looked at the basic steps that needed to occur to move the process forward.

Once they had the high-level process maps, they could then decide which areas to *create detailed process maps*. The detailed maps were used in the written

documentation itself to provide the roadmap for the process.

All process maps must go through a *validation step*. This is where the team verified the accuracy of the process. Often, the steps that actually occur in a process vary greatly from the steps a manager or supervisor expected to see.

That is why, during the creation and validation steps, the team asked for input of the people who actually performed the task. It was an eye opening experience for the managers.

4. Document Procedures

Kickoff Meeting >> Conduct Assessment >> Process Map >> **Create Documents** >> Conduct Training
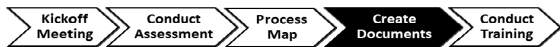
Documenting procedures can be intimidating for many people. Just the thought of writing down all of the steps in a

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process is difficult. Employees worry that their supervisors will criticize their daily actions for completing a task and for not working more efficiently.

And often, even if they are a member of the clerical staff, the person hasn't been taught how to use the software tools to create well-formatted and clearly designed documents.

1. To help reach a successful outcome, our experience has shown it's best to work with the managers and staff to identify the tasks that need to be documented. Together, they set the priorities and developed a tentative timeline.

2. Then the team asked each employee to write down the steps they perform as they complete their activities. This

effort results in a rough, bullet point list of actions they perform.


3. The team took the list of steps and put them into a document template and returned the document to the staff person for review and changes. Pictures were added as well as some missing information.

4. The team members returned the revised document for additional adjustments to the formatting and content, final review, and signoff.

5. The team created written documentation for maintaining the new procedures and determined document storage requirements and the timing of future updates.

5. Conduct Staff Training
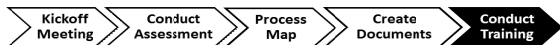
At Miller Productivity, we don't just create the documentation and leave. We want to ensure that your staff can effectively create and maintain procedures without our assistance. To that end, we provided training throughout the process to ensure complete understanding.

Problem Solved!

And then, almost as if by magic, the problem was solved. Mr. Business Leader went from frustrated and worried with no clue how to get the information out of the retiring employee's heads to feeling secure, in control, and confident that processes are well documented and business disruption is avoided. All this in less than 60 days!

 Now, what does this mean to you? Simple! It means I can and will show you how to get those same results for yourself, no matter how desperate your circumstances may seem right now. I'll show you exactly what Miller Productivity did to get these results for Mr. Business

Leader and, more importantly, how to get those results for you!

We help organizations to:

- Identify documentation requirements
- Create process and value stream maps
- Assess current processes
- Prioritize process improvements
- Create clearly written documentation
- Create multimedia-training modules (online and offline)
- Learn to use tools to effectively create and modify standard operating procedures and processes
- Improve productivity and profitability
- And much, much more!

Is Your Company At Risk?

Complete this assessment to determine if your organization could benefit from documenting your procedures. Place a checkmark next to the question or statement if your answer is "Yes".

Risk? → YES

↓

NO
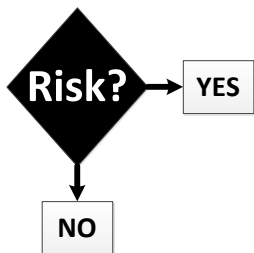
☐ There are one or more employees in my organization that have specialized knowledge that is not available to others.

☐ If a key employee is out for an extended period of time, we would have to put daily activities or customers on hold until they return.

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- [ ] If a key employee were to leave the company, it would be difficult or almost impossible to complete their assigned tasks.

- [ ] We use on-the-job training methods with our experienced employees teaching our new employees.
- [ ] Our procedural manuals are out-of-date and don't reflect our current work processes.
- [ ] We have recently implemented new software and our staff is not using all of the features to work effectively.
- [ ] We have customers with reporting requirements or government regulations that require up-to-date documentation.

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- ☐ Our employees each decide how to get the work done and they all have a different way of doing the same tasks.
- ☐ We have a lot more quality issues recently and have to rework and inspect the work more carefully before it leaves our facility.
- ☐ Our employees are complaining that they have too much work to do and not enough time to get it all done.
- ☐ We have recently lost several employees who were promoted to other positions or have moved to another company.

The more questions you answered "Yes", the greater the need for process and procedure documentation.

Benefits

| Continuity | Accountability | Performance | Quality |

Most business leaders understand that documenting processes is valuable to their business success but are often reluctant to spend the time and money to get it done. They think there are more pressing issues in their business day than creating a process and procedure document.

Thinking that way is short-sighted. Many organizations are in the same situation as Mr. Business Leader with key employees getting ready to retire or leaving for another position. By creating and using your process documentation, you set the standard for the work. It gives the business leader and manager a way to ensure continuity, accountability, performance and high quality.

Here are some additional benefits to documenting your processes:

🌀 *Promotes greater understanding* of the process being documented which means better communication between areas within the organization.

🌀 *It forces you to examine everything.* The process itself of creating documentation ensures a close look at the entire organization. Often, owners and managers get so wrapped up in the day-to-day details that they miss the big picture. Documenting your processes provides a different perspective so you can step back from the company and look at how the processes as a whole are working.

❧ *Gives your staff input.* When you begin the documentation process, you will be seeking information from the staff. Not only does this involve them in the process, but it demonstrates to them that their input is valued. This benefit extends beyond the accuracy of your documents. It creates higher morale within the organization as a whole.

❧ *Provides a method to train* or retrain employees so that everyone is completing tasks in the same optimized way. It gets the information out of the heads of your experienced employees and available for the younger staff.

Uses

There are a number of traditional and non-traditional uses for process mapping and documentation, some of which are outlined below. Consider your own situation. How can process documentation be used within your organization?

Quality Improvement

 Problem Solving. Process Mapping is considered by many to be one of the seven most important quality improvement tools available. It is traditionally used during the definition stage to help organize your thinking and provide an understanding of the underlying causes of a problem. It is also used to identify potential problem

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areas, bottlenecks, unnecessary steps or rework.

❧ *Cost-of-Quality Analysis.* Cost of quality are those costs incurred because of poor quality—costs that would not be incurred if things were done right the first time and every time. There are three types of activities that commonly incur costs: checking for errors, correcting errors and damage control after the customer has been affected.

Software

❧ *Software Implementation and Design.* Traditionally, software designers use flow charting to create the underlying structures when developing programs. As more and more software is being

customized for the end user, flow charting can help to identify how the new software will affect your current work process. Documenting the process makes customization of software easier and more effective.

Personnel

🌀 *Training and Education.* An organization will only succeed when all of its members are on the same page, working towards the same goal. Process documentation provides a visual communication tool to assist employees and stakeholders to clearly understand the process and key results. Graphic representations also make training materials and job aids more useful and easily understood.

❧ *Team Development.* More than ever organizations are interested in having their personnel work in team situations. As people work together to identify process steps, the rapport and understanding developed during the documentation exercise enhances the effectiveness of the team in the workplace.

❧ *Staffing Decisions.* A review of work processes can find hidden, non-value added steps that are being performed. By evaluating the work process, an organization can determine if the volume of work is distributed correctly. Alternatively, steps can be eliminated that would free up staff for more value-added tasks.

How We Work With You

Following our initial meeting, we draft a very simple letter of agreement outlining our agreed-upon terms for the engagement. Typically, we describe the outcomes we expect to achieve, the process we will follow, the proposed timeline, and the anticipated monetary investment.

We keep you informed on a weekly basis of our progress and planned next steps.

Meetings can be arranged at your location or ours. We also have the ability to host remote meetings via GoToMeeting™. This increases the productivity for everyone.

In Summary

No matter what type of organization you lead—manufacturing, professional services, healthcare, or non-profit—to be successful in today's marketplace means the people within the organization must work effectively and efficiently. Improving your organization and reducing unnecessary steps can be accomplished by taking a critical look at your processes and documenting your procedures so that the work is completed consistently and meets the quality standards you and your customers expect.

Well written policies and procedures improve performance by establishing clear guidelines for consistency and increased productivity. When you document your tasks, you eliminate the need to "learn" the

procedures each time you perform that task. As a consequence, you don't have to rely on your own memory or the memory of your staff.

Contact Us

For more information or to discuss a potential project please call or send an email:

260-255-5064
dmiller@MillerProductivity.com

We look forward to hearing from you!

Deb

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About Miller Productivity

Deborah C. Miller started the company in 1998 to provide training and custom documentation and procedural manuals to a financial services organization.

Over the years, as customers requested, Deb added project management and process improvement to the professional services provided by Miller Productivity.

In 2001, Deb became certified in Six Sigma and later Lean in Healthcare.

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These process improvement philosophies are provided to our manufacturing, health care and financial services clients in various ways to help them increase their productivity and profitability.

In 2011, Deb achieved the ASQ Certified Manager of Quality/Organizational Excellence

Our mission is to build quality customer relationships and to provide affordable, creative, no-nonsense solutions to the business challenges our customers face.

Services include:

- Process Analysis and Mapping
- Value Stream Mapping and Analysis
- Process and Procedure Documentation
- Assessments
- Project Management
- Lean: 5S, Kaizen, 8 Wastes
- Instructional Design
- Training Videos – scripts, production
- Coaching

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"Deb is very creative and has strong technical skills, both which help her in analyzing and creating processes and solutions for improvement."

— *Sharon Miller*
President, Bulldog Consulting Services

"There is only one word to describe working with Deb Miller— AWESOME. She redefines the phrase "Giving it 150%."

—*Dan Underberger*
MD, Peminic, Inc.