THE BREAKTHROUGH SERIES

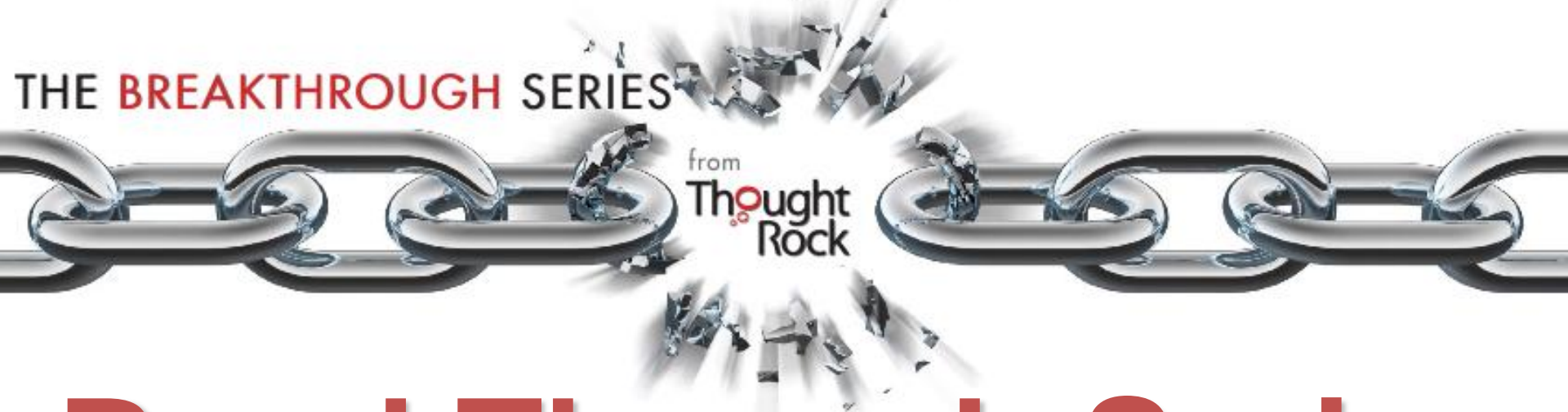from Thought Rock

Thought Rock Live Presentation

Graham Furnis
Senior Consultant,
B Wyze Solutions

Process Improvement:
Pain Point Analysis and Quick Wins Workshop

This presentation discusses process improvements through a pain point analysis approach.

Key Learning Nuggets:
Discuss the value of a pain point analysis
Understand the pain point analysis approach
Manage and prioritize your pain points
Problem solve and your pain points

THE **BREAKTHROUGH** SERIES

from
Th**o**ught
Rock

BreakThrough Series

Helping you to achieve breakthroughs in your organization!

- Templates
- Live Webinars
- Roundtables
- Workshops

Process Improvement: Pain Point Analysis & Quick Wins Workshop

Agenda

- Overview: Define Pain Point Analysis and Terms

- Step 1: Pain Point Identification
- Step 2: Rationalize Pain Points

- Step 3: Problem Solve Pain Points
- Step 4: Rationalize Problem Solutions
- Step 5: Determine Quick Wins

- Summary and questions

Overview: What is Pain Point Analysis?

- An informal improvement technique
  - used to assemble key stakeholders to an IT Service or IT Process
  - for the purpose of identifying issues of concern and/or barriers preventing achievement of one or more objectives
  - is from the stakeholders' perspective

- Key Stakeholders form a Focus Group that must:
  - brainstorm for "pain points" and agree on priorities
  - brainstorm for "problem solutions" and agree on choices
  - solve towards determining quick win initiatives

Overview: What is a Quick Win?

A quick win is an early success in a series of improvements

- something obtained in the short term
- gathers valuable lessons learned
- demonstrates early success
- builds confidence
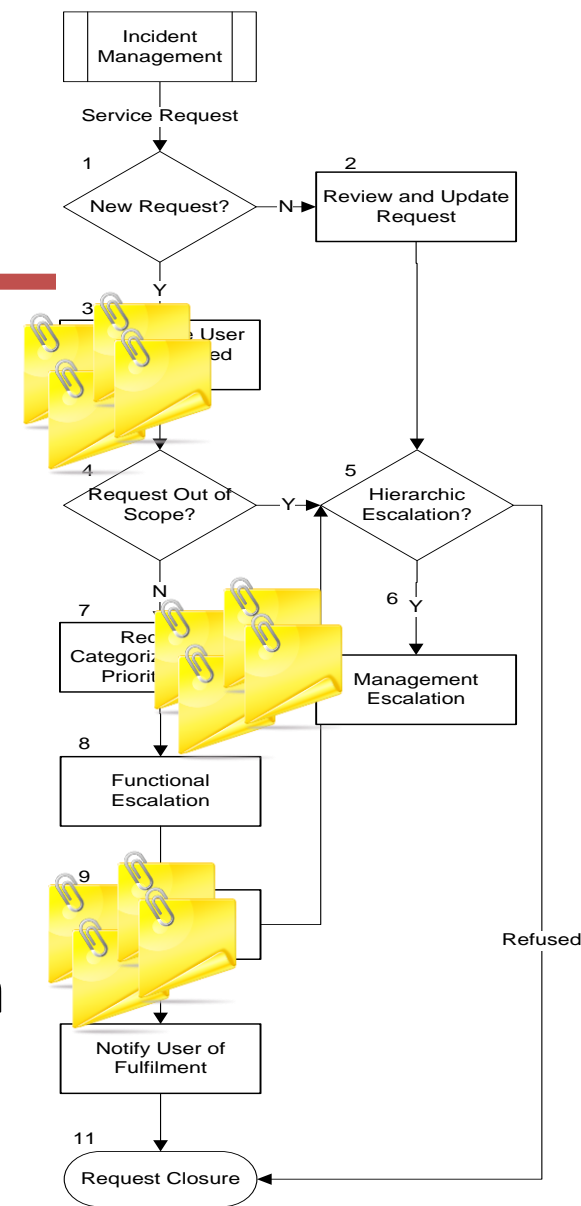- keeps commitment levels high during the longer program of improvement

Step 1:
Pain Point Identification

- Assemble your stakeholders
  - Ensure they have something to say
- Form teams

- Provide visuals wherever possible
- Neutral facilitator helps
- Demonstrate and lead people through brainstorming examples
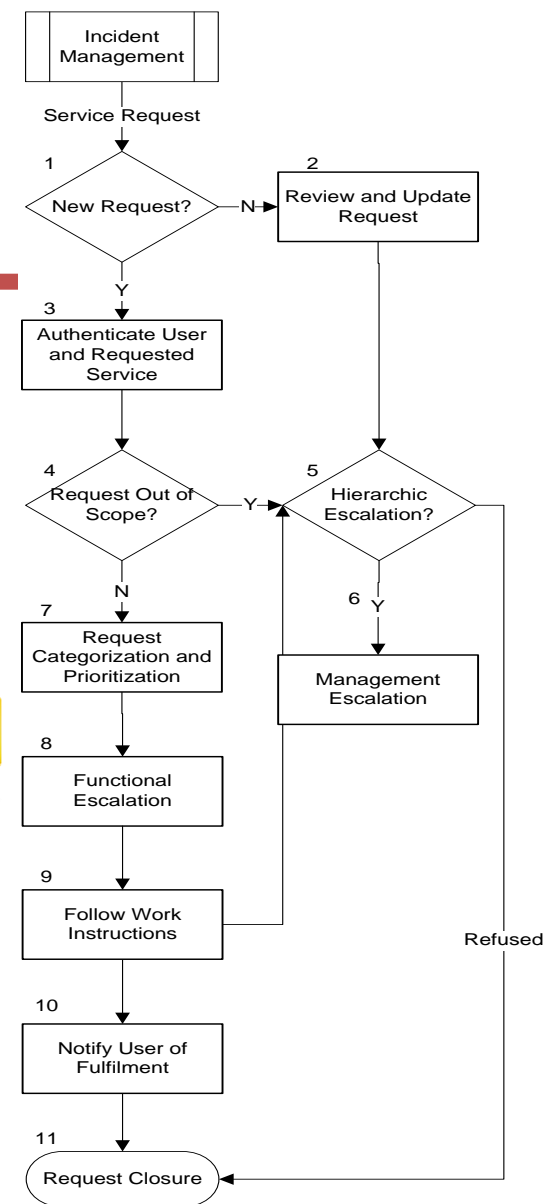- Assign scribes & let thoughts flow

Step 2:
Pain Point Rationalization

- Each team consolidates and documents their pain points list
  - Eliminate duplicates
  - Limit to top 10 pains

- Each team discusses and assigns the business priority for their pain points
  - Provide priority guidelines…
    - business objectives, business impact, the customer, efficiencies, effectiveness, etc…

Incident Management
Service Request

1 New Request? —N→ 2 Review and Update Request
Y
3 Authenticate User and Requested Service

4 Request Out of Scope? —Y→ 5 Hierarchic Escalation?
N
7 Request Categorization and Prioritization
6 Y
Management Escalation

8 Functional Escalation

9 Follow Work Instructions
Refused

10 Notify User of Fulfilment

11 Request Closure

Step 2: Example - Pain Point Rationalization

- Example - Service Desk (SD) pains

Cust	Rank	Pain	Pain Point Description
SD	4	1	The Service Desk Supervisors are too busy with Incidents to be interrupted with Request complaints
SD	6	2	Some confusion on classifying tickets as Incident or Request, specifically with Password Resets
SD	7	3	Fulfilment teams are closing their assignment tickets once a request is fulfilled, but are not notifying the Service Desk. As a result, many tickets remain open at the Service Desk cluttering their follow up.
SD	8	4	Frustration in not knowing how to handle most requests unless the analyst has experienced it before
SD	10	5	Frustration not knowing which functional teams to assign Requests, resulting in multiple calls to fulfillment teams
SD	3	6	Unknown status updates on tickets that have been sent to request teams

Step 2: continued…
Pain Point Consolidation

- Combine Pain Point lists
- Each team presents top pain points and their priorities
  - Look for and combine-cross functional (shared) pains
  - Agree on priorities

- Produce a consolidated pain points list
  - Prioritize the consolidated list

Step 2: continued…
Example – Combined Pains

- Stakeholders:
 - Service Desk (SD), Level 2 Support (L2), Customers (BU)

| Cust	Rank	Pain#	Pain Point Description
SD, L2, BU	9	31	Lack of having instructions for how to handle Requests consistently each time
SD, L2	9	32	Lack of knowing who is responsible for what specific Requests or types of Requests **(lack of OLAs)**
SD, L2, BU	8	33	Low priority ticket status is not updated (aged) as time increases, resulting in User calls for status and complaints
SD, BU	6	34	There is no Service Catalog for Requests
BU	5	22	The same Requests seem to be Prioritized and handled differently each time **(lack of SLAs)**
SD, L2, BU	5	30	Status updates rules are not clear and not being communicated from Fulfilment teams to Service Desk to Users
SD, L2, BU	5	35	Lack of having and publishing a single source for forms required to execute Requests
L2, BU	4	36	Requesting new PC fulfillment is not well documented and takes too long for the business
SD	2	11	Work overload from too many Requests for current staffing levels
SD	1	1	The Service Desk Supervisors are too busy with Incidents to be interrupted with Request complaints
SD	0	2	Some confusion on classifying tickets as Incident or Request, specifically with Password Resets

Step 3: Problem Solve the Pain Points

- Distribute consolidated and prioritized pain points list
- Assemble your stakeholders
  - Cross-functional teams for shared cross-functional pains

- Neutral facilitator helps
- Brainstorm solutions to pain points
- Assign scribes & let thoughts flow
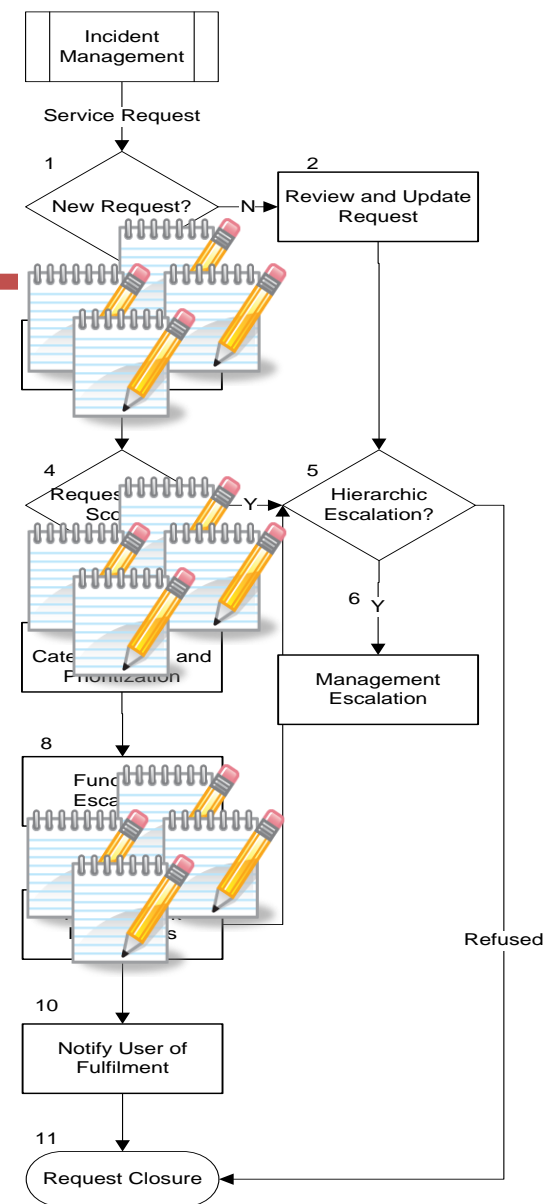
Step 4: Problem Solution Rationalization

- Each team consolidates and documents their solutions list
  - Eliminate duplicates
  - Limit to top 5 solutions

- Each team discusses and assigns rough cost and time estimates
  - Provide estimating guidelines…
    - 1 < 3months, 2< 6 months, 3<9 months
    - 1= current staff, 2 = team, 3=project
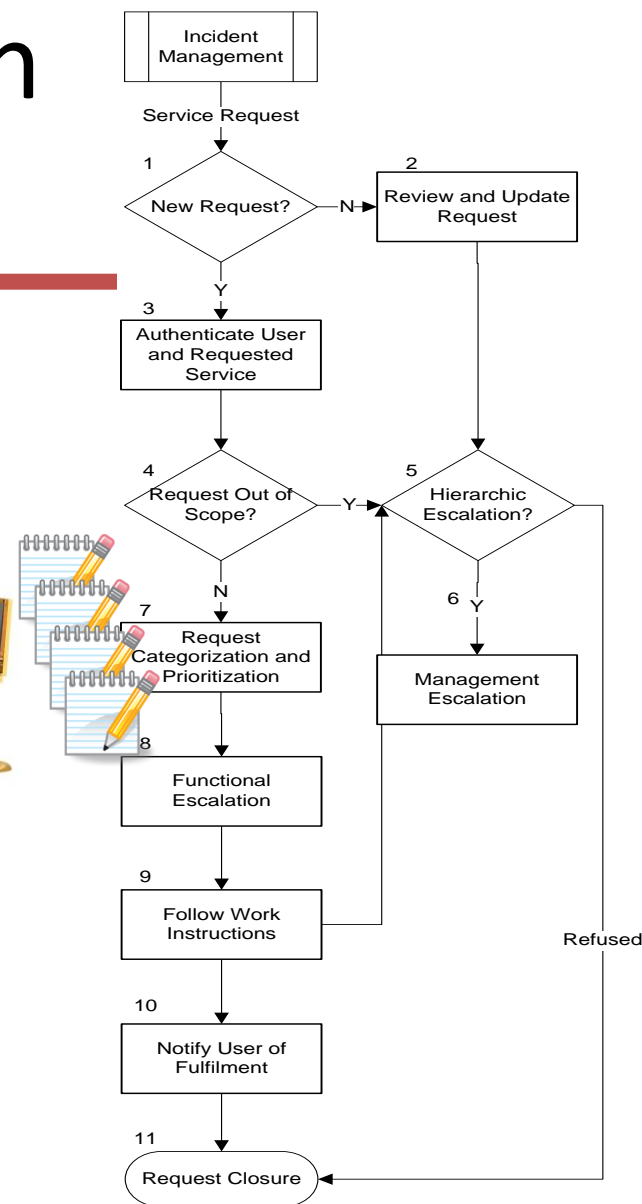
Step 4: Example - Problem Solutions Round 1

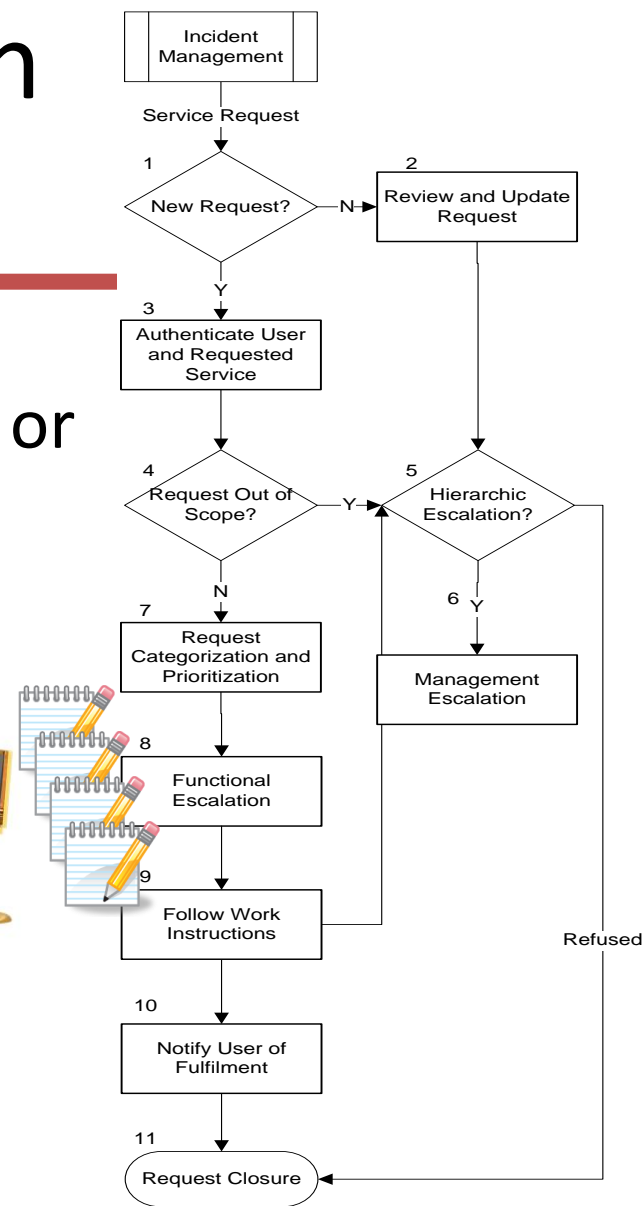| Total	Time	Cost/ Effort	Rank	Pain	Solution Description
			9	31	Lack of having instructions for how to handle Requests consistently each time
5	3	2	1st round	31.01	The Request Process ensures each team documents procedures and instructions for their Requests
6	3	3	1st round	31.02	The Request Process will review all Request records and create Request procedures from past experience.
			2nd		
			2nd		
			9	32	Lack of knowing who is responsible for what specific Requests or types of Requests **(lack of OLAs)**
6	3	3	1st round	32.01	Develop the Request Service Catalog and assign IT responsibilities for each Request within negotiated and agreed Operational Level Agreements (OLAs).
4	2	2	1st round	32.02	Review last 6 months of Request tickets and document the Request along with the Fulfilment teams. Negotiate acceptance of Requests through negotiated and agreed OLAs.
			2nd		
			2nd		

Step 4: Problem Solution Round 2 Rationalization

- Each team continues to refine their solutions until they can identify one or more quick wins to their larger solutions

Step 4: Example - Problem Solutions Round 2

| Quick Win	Total	Time	Cost/ Effort	Rank	Pain	Solution Description
				9	31	Lack of having instructions for how to handle Requests consistently each time
	5	3	2	1st round	31.01	The Request Process ensures each team documents procedures and instructions for their Requests
	6	3	3	1st round	31.02	The Request Process will review all Request records and create Request procedures from past experience.
	3	1	2	2nd	31.03	Starting with the most common Requests (Password resets, new PCs), document standard procedure steps with agreement and sign off from all stakeholders. Learn from this when choosing the next most common Request set.
Quick Win	2	1	1	2nd	31.04	Starting with the most common Requests (Password resets, new PCs), request Fulfilment teams document their standard procedure steps with informal agreement. Learn from this when choosing the next most common Request set.
				9	32	Lack of knowing who is responsible for what specific Requests or types of Requests **(lack of OLAs)**
	6	3	3	1st round	32.01	Develop the Request Service Catalog and assign IT responsibilities for each Request within negotiated and agreed Operational Level Agreements (OLAs).
	4	2	2	1st round	32.02	Review last 6 months of Request tickets and document the Request along with the Fulfilment teams. Negotiate acceptance of Requests through negotiated and agreed OLAs.
	3	1	2	2nd	32.03	Review last 3 months of Request tickets and document the Request along with the responsible Fulfilment teams. Negotiate informal acceptance by fulfilment teams to start with. Learn from this when choosing the next most common Request set.
Quick Win	2	1	1	2nd	32.04	Starting with the most common Requests (Password resets, new PCs), document the Request and responsible Fulfilment teams and negotiate informal acceptance. Learn from this when choosing the next most common Request set.

Step 4: Problem Solution Round 3 Consolidation

- Each team presents solutions
  - Look for and combine shared solutions
- Produce a consolidated list and combined project plan
  - Quick wins
  - Short term actions
  - Mid term actions
  - Long term actions
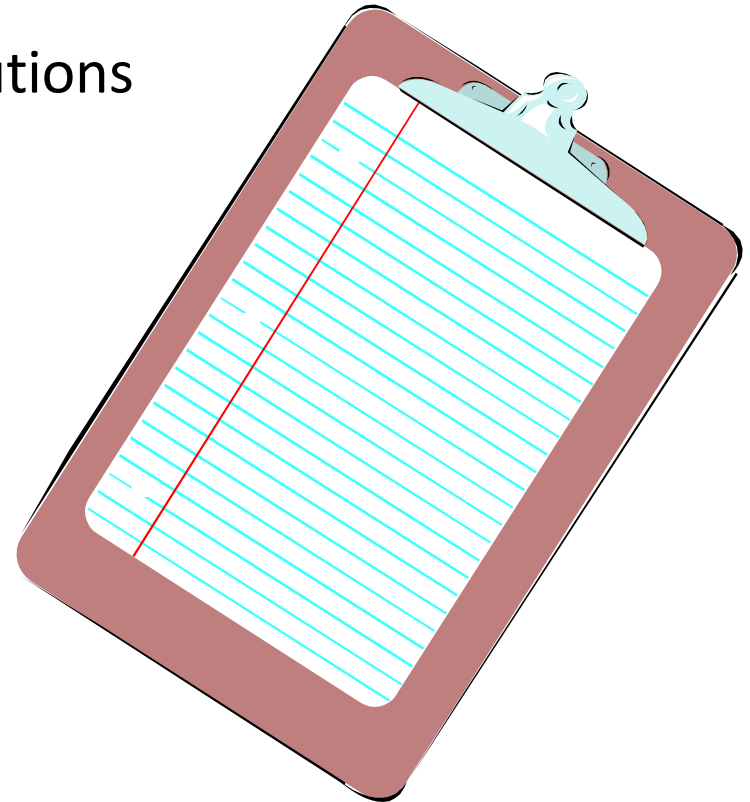
Summary

- Step 1: Brainstorm Pain Points
- Step 2:
  - Rationalize Pain Points
  - Consolidate Pain Points
- Step 3: Brainstorm Solutions
- Step 4:
  - Rationalize Solutions
  - Identify quick wins
- Consolidate Solutions
  - Produce Project Plans

Continued Reading…

THE BREAKTHROUGH SERIES

from Thought Rock

Join Us For Lunch Every Tuesday At 12PM!

Phone: 1.877.581.3942
Email: Info@ThoughtRock.net
Twitter: @ThoughtRockers

www.ThoughtRock.net