

# Oakmonte Advisory Offering

## CLEAR Process

### **Description**

The CLEAR Process (**C**ollaborate, **L**earn, **E**ngineer, **A**ction, and **R**eview) provides a framework for business process improvement, performance optimization, and performance management.

### **Approach**

#### **COLLABORATE**

We use a Kaizen Event approach to this stage to engage with participants, owners, managers, and stakeholders. The result is a 360-degree process map, the significant variables, areas of impact, and potential improvement.

#### **LEARN**

The process mapping results are the base for prioritizing the improvement suggestions in Pareto format using impact, feasibility, timing, and cost as criteria. The final design is selected and moved to the ENGINEER stage.

#### **ENGINEER**

The revised process design is completed and reviewed by all stakeholders. This step will include training material development, the communication plan, and the metrics and key performance indications (KPIs) to monitor the process performance.

#### **ACTION**

A defined implementation plan in a prescribed what, who, and when format enables the project. The plan includes a leader, participants, stakeholders, approvers, and an issues list and progress reports.

#### **REVIEW**

With the new process in place, specific review time points will evaluate the performance utilizing the KPIs developed in the ENGINEER stage. The KPI analysis will reveal whether the new method has met the expected outcomes or if a further revision is necessary.

### **Engagement Profile**

This offering will benefit any business area from sales to operations to create a new process or to revise an existing method to add tangible business impact.

### **Primary Stakeholders**

- Process owners
- Stakeholders
- Managers

### **Expected Results**

- Tangible business impact in measurable terms via KPIs
- Ongoing and transparent monitoring of performance and results
- Strong alignment and buy-in from all stakeholders
- Improved momentum in continuous improvement efforts
- Improved team skills in problem-solving



OAKMONTE ADVISORY

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