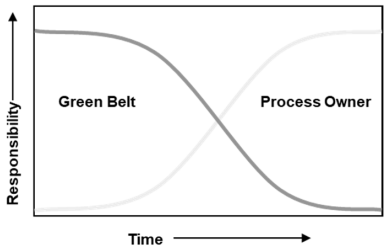
Closing Your Project



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Let's Talk About Project Closure

- What is a closed project?
  - What does it look like?
  - Who is in charge?
  - Who owns the results?
- Who tracks the results of a closed project?
  - Process Metrics?
  - Financial Savings?
- What is the Green Belt role in a closed project?

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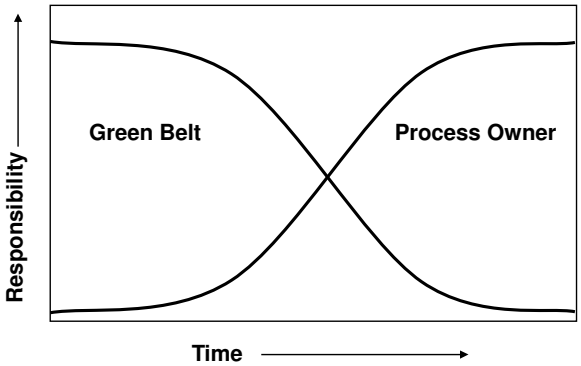
Project Transition – Responsibility Flow

- Green Belts must work their way out of the project.
- Responsibility shifts from the Green Belt to the Process Owner.
- Start early.
- Have the project team do most of the work. Resist the temptation to do it all yourself.
- Complete a Project Transition Action Plan.



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Project Transition – Keys to Success

EXIT STRATEGY!

- Get buy-in early – no surprises!
  - Project team must include all the important players.
  - Regular reports to process management
- Establish systems for frequent measurements.
  - Process control and product monitoring
- Update the procedures and documentation.
  - Document any remaining parts of the hidden factory.
- Take the time to truly educate (not just train or retrain) everyone.
  - New procedures and new measurements require education.
- Monitor the results.
  - Frequent measures of key project metrics
- Complete a project transition action plan.

When should you start planning your exit strategy?

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Project Transition Action Plan

- Make a plan to complete your project.
  - **What** tasks are required to complete the project?
  - **Who** is responsible for each task?
  - **When** will each task be complete?
  - **Who** *owns the plan? -- Not the Green Belt!*
  - **Who** *drives the plan to completion? – Not the Green Belt!*
- The plan is not complete until everyone agrees to it
  - Everyone who has an action item assigned must agree
  - Process owners agree that the plan completes the project.

The transition plan is a contract with your project partners.

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Project Transition Action Plan Template

Project Title:

Transition Owner:

Plan Date:

	Actions Required for Completion	Action Owner	Initials	Scheduled Completion	Actual Completion
1					
2					
3					
4					
5					

Signatures:	
	Transition Owner
	Process Owner
	Master Black Belt
	Black Belt

The intitials and signature block are critical.

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D → M → A → I → C → Realization

- When is Realization?
  - After the project is closed!
- What is Realization?
  - The twelve months after project closure
  - When the profits are counted (realized)
- Who owns the project during realization?
  - The Process Owner for Process Metrics
  - The Finance Rep for accumulating savings

The Green Belt is not typically part of Realization.

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The Green Belt's Swan Song

What is the last thing the Green Belt needs to do?

The Final Report!

The job's not over 'till the paperwork is done.

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A Few Suggestions About Final Reports

- Start early.
  - Write the Final Report as much as possible with each phase completion.
  - Projects don't have to have every item completed before you write the Final Report.
    - Use a Project Transition Action Plan.
    - Include the PTAP in the Appendix of the Final Report.
- Use PowerPoint or the Minitab ReportPad as a container for important analyses.
  - Easy pasting into the Final Report
- Get all the signatures and initials!
  - Process Owner, Champion, MBB
  - Anyone else who as an outstanding action

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Final Report – Major Elements

- Executive Summary
- Project Definition
- Project Management Details
- Summary of changes made to affect improvement
- Outstanding actions required to obtain improvement
- Phase Conclusions
- Phase Deliverables
- Control Methods Applied
- Control Plan
- Key Six Sigma Elements
- Appendices

Final reports are essential for organizational memory.

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Executive Summary

- Purpose – To summarize your project in one paragraph
  - Problem(s)
  - Solution(s)
  - Benefits
- Include
  - A concise problem statement
  - A calendar date/reference
  - The changes that were made
  - The forecasted financial benefits
  - The process capability improvements (only if more significant than the financial benefits)

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Project Definition

- Final, refined problem statement
- Goal/objective statement
  - State your initial goals and how completely they were met.
- Projected business benefits
  - Verified savings forecast
  - Soft savings estimates
  - Other intangibles – customer goodwill, increased capability
- Keywords
  - Keywords are for increasing the efficiency of searching the library or projects.

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Project Management Details

- Timeline
  - Planned vs. Actual
  - List barriers that caused schedule delays.
- Savings
  - Forecasted and already accumulated savings
  - Add Reasons for changes to the original forecast.
- Metrics
  - Primary and Consequential metrics
  - Graphs, here, will help tell the story.
- Team Members
  - List all team members.
  - If some deserve special recognition, do so here.

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Phase Conclusions

- A Key Project Deliverable
- Should be readily available
  - Already presented during project report-outs during training.
  - Summarized in ProjX.
  - Required before moving into the Next Phase.
- Conclusions need to be clear
  - Is it necessary for others to follow your project reasoning?
  - Will aid further improvement work

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Summary of Changes

- Changes made to affect improvement
  - Changes already made
  - Quantify the effect of each change, if possible.
  - Discuss changes not made.
  - Identify the process optimum settings.

- Outstanding actions required to affect improvement
  - Should come straight from your Transition Action Plan
  - Scan and paste the initial & signature sheet or include the PTAP in an Appendix and reference it here.

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Phase Deliverables

- **Measure**
  - **Process Map**
  - **Cause & Effect Diagram (Fishbone)**
  - **Cause & Effect Matrix**
  - **Baseline Capability Analysis & RTY**
- **Analyze**
  - **Multi-Vari Analysis**
  - **ANOVA**
  - **Tests of Hypothesis**
  - **Correlation & Regression Studies**
- **Improve**
  - **DOE Planning Sheet**
  - **Y= f(X)**
  - **DOE Report**
  - **Revised Process Settings**
- **Control**
  - **Metrics Reporting Plan**
  - **Process Owner Responsible for on-going control**

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Control Methods & the Control Plan

- Remember, Six Sigma is about permanent success.
- Include in the Control Methods section:
  - Descriptions of mistake-proofing projects
  - Details of any Control Chart implementations
  - Any other Control Methods activities
- Include a copy of the final Control Plan.
  - All control activities – new and old
  - If it is incomplete, include an addendum describing how it will be completed.

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Key Six Sigma Elements

- Six Sigma has its own unique tools and vocabulary.
- In this section include your calculations for the key Six Sigma elements:
  - Critical X's and Critical Y's Identified
  - Critical Customer Outputs Identified
  - DPU measurement
  - DPMO & Z-score computed
  - Determination of Entitlement
  - Short-term Process Capability
  - Long-term Process Capability

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Managing Multiple Projects

- It can be advantageous for a Green Belt to manage more than one project at a time.
- A few tips:
  - Don't start another project during the first/training project.
  - Don't use the same people on multiple teams.
  - Don't two teams working Define or Measure activities.
    - Wait until project is in Analyze, Improve, or Control before starting another
  - Don't have two large projects operating together.
    - Only run a large & a small project, or two small projects together
- Formal project plans/timelines are critical!
  - Microsoft Project software can help manage projects to schedules.

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Thank You

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