



From Nuthin' to Somethin': How to Gear Up and Make it Happen



2018 Annual Conference

Who we are:

- Colette Williams Assistant Director University Process Improvement,
University of Memphis
- Carol Laney Assistant Director of Admissions,
University of Memphis
- Teresa Hartnett Associate Dean of Finance & Admin, Medicine
University of Tennessee Health Science Center
- Lisa M. Hall Executive Director of Systems Development,
University of Tennessee Health Science Center



Our goal:

- Help you get started with improvement & change in your world
- Tell you our stories...
- Talk through a fictional scenario...
- Expand your network

Agenda

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- A decorative graphic on the left side of the slide. It features a series of concentric, semi-circular arcs in shades of blue, teal, and yellow. From the center of these arcs, several arrows of the same color palette point outwards and upwards, creating a sense of movement and progression. The background of the entire slide is a light gray with a subtle geometric pattern of hexagons and lines.
1. Introductions & Overview
 2. Group Discussion: ***Challenge to You*** Part A
 3. One Approach: UofM
 4. Another Approach: UTHSC
 5. Group Discussion: ***Challenge to You*** Part B
 6. Common Themes & Takeaways

Group Discussion: *Challenge to You* Part A

- Review the Scenario
- Discuss Part A (Q1 – Q7) with your group
- Feel free to make any assumptions that help you think through the scenario
 - Example of an assumption that might help

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One Approach

COLETTE WILLIAMS
UNIVERSITY OF
MEMPHIS

How it began

- Need to address rapid ERP Banner Implementation
 - Implementation schedules did not allow for process review
 - Initially was formed to review business processes relating to Banner implementation
- 2009 - utilized stimulus funds to hire TSI consultants to provide framework and training on methodology
- Governing structure formed that included Top Executives
 - Having this support is why we are so successful

How it began

- Dedicated space for all meetings was identified
- Dedicated resource – IT created a position to manage the Process Improvement Initiatives
- TSI provided Change Management training for AVP and Managers
- Spring 2010 - first team was formed and led by TSI

Current state

- Used for projects campus wide on various subject matters:
 - Student services
 - Finance
 - Human Resources
 - Foundation
 - Technical solutions
- To date - completed 71 projects
- Currently 10 active projects
- 336 Staff/Faculty across campus have served as team members
- University Best Practices featured in EAB articles

Things to Consider:

- How aggressive does 'Change' need to happen
- How much time is needed to allocate to a project
- Communication plan to campus
- Executive support & Governing structure
- Does it fit your institutional goals of service excellence

Things to Consider:

- Dedicated space and resources
- Keep projects small and attainable
- Approach with the 'Band Aid' theory, just get it done
- Need Time Commitment for team members

Team Structure:

- Qualifications for team members
 - Strong attention to detail
 - Knows the business
 - Meets deadlines
 - Multi-tasker
 - Understands the problems
 - Critical thinker
 - Sees the big picture
 - Open to change
- Cross Functional Team Members
- Subject Matter Experts (SME)
- Team Size - 6 to 8 people generally

Success Stories

▪ **Student Credit by Exam**

- Student & staff time savings of over 400 hours annually
- Eliminated students walking paper forms across campus for approvals by developing a system with workflow and & e-signatures
- Implemented a new online payment option

▪ **Employee Education Benefit Program**

- Departmental staff time savings of over 430 hours annually
- Eliminated unnecessary roles in the approval process
- Eliminated need to print/copy paper forms by developing a system with approval workflow and & e-signatures

Success Stories

▪ **Banner Notifications Focus Group**

- Implemented Evisions Argos reporting tool to send targeted email messages to students
- Over 45 messages currently in production
- Examples include messages to students about holds, issued permits, and messages to students, advisors, and stop-out coaches when last class is dropped

▪ **Student Government Association – Travel**

- Departmental student and staff time savings of over 1,000 hours annually
- Eliminated unnecessary roles & pre-travel meetings
- Centralized Travel PO creation in our Shared Services Center, eliminating departmental staff across campus from the process
- Use DocuSign for the travel reimbursement which incorporated electronic approvals and signatures, eliminating need for students to walk paper forms across campus for signatures

Lessons learned

- Identify the Process Owner Early
 - During the 'AS IS' Analysis stage
- Team Lead
 - Generally should not be the Process Owner. They tend to make changes that only benefit their area
- Key Resources Time Allocation
 - Key Resources cannot be over committed to other major campus projects. Managers need to be conscientious of time commitments when approving staff to serve on a team

Lessons learned (cont.)

- Have the key staff from the office owner as a team member
- Communication to Campus Users
 - Timing is critical to inform users changes are coming
- Projects needing same resources have to be scheduled accordingly so they are not being double booked

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Functional View

**CAROL LANEY
UNIVERSITY OF
MEMPHIS**

Current state – a functional view

- Set the tone
 - Welcome the opportunity
 - Don't let them see you sweat!
 - Be positive but realistic
 - Encourage staff, then support them
- Be flexible
 - Resist the urge to “Have it Your Way”
 - Be willing to listen to other ‘experts’
- Celebrate the victories
 - Recognize & acknowledge

Current state – a functional view

■ Values

- Untying the knots
- Realizing you're never too “experienced” to learn
- Debunking myths/assumptions
- Embracing others
- Learning to not fear the “title”
- Communicating Outcomes

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Another Approach

LISA HALL

UNIVERSITY OF TENNESSEE
HEALTH SCIENCE CENTER

How it began



Baby Steps!

Start dripping...



- Faculty Hiring Process Mapping
- Creation of Business Analysts to improve requirements gathering and to reduce technical development effort
- Set standards for department

Improving what is in your area of control...start the drip!

Campus Networking

- Unit Efforts
 - New ITS Project
 - COM API
 - Postdoc Hiring team



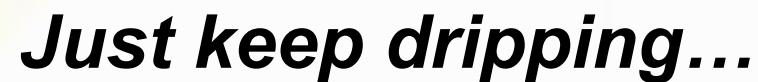
Keep dripping on anyone who will listen!

College of Medicine efforts



- Critical dataset was manually updated each month
 - From our ERP
 - And three partner groups
 - 1,110 faculty
 - Department-specific spreadsheets emailed to business staff
- Networking + systematic approach = major improvement
 - Automated daily pull from ERP
 - Online access and org security
- Opened eyes to the possibilities
 - Have followed with a technology users group & other training
 - Requesting that other units make improvements that we need
- “We need to do more projects like those.”
--college administrator, just a few weeks ago

Three blue water droplets of varying sizes are arranged in a cluster. The largest droplet is in the center, with two smaller droplets positioned above and to the left, and another smaller droplet to the right. All droplets have a glossy, 3D appearance with highlights and shadows.



When preparation meets opportunity...SUCCESS!



We got Nuthin'!

Lean ITS Pilot Goals, per EVC

- Standard nomenclature
- Recurring meetings to check in with EVC
- Keep pilot projects within ITS control
- Limit to 2 ITS projects
- Indoctrinate the campus after internal successes
- ITS moves UTHSC, then step out of ITS

Commitment to Lean 6 Sigma pilot in ITS

- Provided updates every 2 weeks to EVC
- Researched Training
- Leverage Assets
- Collaborate with HIIM Faculty
- All roads pointed to Lean 6 Sigma Methodology
- Asked for Executive level support
- Quarterly Project Reviews with EVC

Who do you know?

Training Schedule – *Lean ITS* Pilot 1st iteration

Lean ITS Pilot

- March 1st – Pilot Kickoff
- March – Define Phase
- April – Measure Phase
- May – Analyze Phase
- June – Improve Phase
- July – Control Phase – Training & Project wrap-up

Each month:

- Pre-work assignments – reading & videos
- Weeks 1 & 3 – 3 hour Working Project Meetings
- Training, coaches & project meetings
- Every week – teams met for 1½ hour meetings

Project Template

Purpose & Goals:

- Practice what we preach
- Standardize the process
- Every team completes a template
- PowerPoint - Able to share with management at any stage of project
- Guides through project process
 - Select which tools to use and update the corresponding slides
 - Delete the slides for the tools you don't use
- Documents the decisions made during the project *as you go*
- Documentation is completed at the end of the project
- Collaboration – anyone on team can update
- Published guidance for future projects

Catching *FIRE*...

- Department of Research interested in piloting
- Transition training from HIIM Faculty to ITS team
- Tweak ITS training for Research
- Goals:
 - Shrink timeframe – weekly trainings
 - Keep people engaged & interested
- Lessons Learned:
 - Plus/Deltas provide excellent feedback



When it rains, it pours!

Training Schedule – *Lean Research* Pilot 2nd iteration

Lean Research Pilot

- May 31st – Pilot Kickoff & Define Phase
- June – Define, Measure, Analyze & Improve Phase Training
- July – Control Phase – Training & Project wrap-up

Each month:

- Pre-work assignments – optional reading & videos
- Weekly – 3 hour Working Project Meetings
- 1 hour of training, followed by 2 hours of project work with coaches
- Twice a week – teams meet for 1½ hour meetings

Training Goals

Started with the academic approach, but:

- Modified content to be applicable to university & attendees
- Made it fun!
- Made it relevant!
- Trained the coaches
- Got folks excited to try something new
- All while teaching the tried & true Lean 6 Sigma/DMAIC tools & methodology

Make the lessons memorable

Training Schedule – *3rd iteration*

Lean 6 Sigma Pilot – August 2nd thru October 4th

- Weekly – 3 hour Working Project Meetings
- Training every other week – 1st hour
- Team breakouts for remainder of session
- Coaching available every week
- Bring a project for your department
- Train team members and champions
- Twice a week – teams meet for 1½ hour meetings

Lessons Learned:

- Eliminate Pre-work requirement – optional reading & videos
- Plus/Deltas provide valuable information

Next Steps

- Campus Solution – separate department
- Continuing education for coaches & SMEs
- Scheduled trainings
- Who's next? Department prioritization
- What's next? Project Prioritization
- Executive Quarterly project review & celebration

Now...We've got Somethin'!

Group Discussion: *Challenge to You* Part B

- Considering the lessons that were just shared...
- And your own knowledge and expertise...
- Discuss Part B (Q8) with your group
- Each group will be invited to share one or two highlights of their discussion

Common themes & takeaways

- Executive sponsorship is key
- Networking is key – on campus and off
- Leverage your assets
- Have to have commitment to get improvement done – band aid is okay – doesn't have to take forever
- Lead from where you are - Be bold!
- Share up
- Consultant is a great way to get started
 - But it isn't the only way
- Build a coalition – however you can
 - This can help build executive support
- Continuously improve your program



Thank You

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Please complete the session evaluation
using GuideBook!

