

## Business Process Improvement (BPI) Joiner 7-Step Method – Quick Reference Card

Step 1 Initiate Project	Step 2 Define Current Situation	Step 3 Identify Root Causes	Step 4 Develop Solutions	Step 5 Define Measurable Results	Step 6 Standardize Process	Step 7 Determine Future Plans
<p><b>Goal:</b> To define the Project's purpose and scope</p>	<p><b>Goal:</b> To further focus the improvement effort by gathering data on the current situation.</p>	<p><b>Goal:</b> To identify and verify deep causes with data: To pave the way for effective solutions.</p>	<p><b>Goal:</b> To develop, try out, and implement solutions that address root causes.</p>	<p><b>Goal:</b> To evaluate both the solutions and the plans used to implement them.</p>	<p><b>Goal:</b> To maintain the gains achieved by standardizing work methods or products.</p>	<p><b>Goal:</b> To anticipate future improvements and preserve the lessons from this effort</p>
<p><b>Questions:</b> <b>What is the project's purpose?</b></p> <p>What is the problem / opportunity of this initiative?</p> <p>Why are we doing it this way today?</p> <p>What are the impacts/benefits to other departments and or stakeholders?</p> <p>How will know if things get better? (What are the results the results you are trying to achieve?)</p> <p>What is your plan for this project?</p>	<p><b>Questions:</b> <b>What is the history of the problem?</b></p> <p>Can the problem be described in a sketch or flowchart?</p> <p>What occurs when the problem appears?</p> <p>What are the symptoms? Where and when do symptoms appear?</p> <p>How often does this problem occur?</p> <p>What are the "current" baseline metrics being observed?</p> <p>Who is and who is not involved?</p> <p>What is working in the current step &amp; needs improvement moving forward?</p>	<p><b>Questions:</b> <b>What were the possible causes of the symptoms described in step 2?</b></p> <p>Which of those symptoms are verified by data?</p> <p>Are there deeper causes (of the verified causes?)</p> <p>How does verifying the causes affect decisions about who should be working on this effort?</p> <p>What is working in the current step &amp; needs improvement moving forward?</p>	<p><b>Questions:</b> <b>What solutions were considered that addressed the causes verified in step 3?</b></p> <p>What "criteria" was useful for comparing potential solutions?</p> <p>What are the pros and cons of each solution? Which solution seems best?</p> <p>How will you try them on a small scale? What data will you collect?</p> <p>Are there problems for implementing it full scale?</p> <p>What is working in the current step &amp; needs improvement moving forward?</p>	<p><b>Questions:</b> <b>How well did the results meet the targets for this project?</b></p> <p>How well was the plan executed?</p> <p>What challenges did you face? What worked and what would you do differently?</p> <p>What is working in the current step &amp; needs improvement moving forward?</p> <p><b>NOTE:</b> Did you meet your expected baseline metrics?</p>	<p><b>Questions:</b> <b>(In the future), what new standard method or product will be put in place?</b></p> <p>How will you train employees?</p> <p>What's shall be put in place to ensure that the gains are maintained? (To prevent backsliding)</p> <p>What will we monitor regularly to ensure the change process is still working properly and effective?</p> <p>Have you established a date/timeline for conducting BPI lessons learned?</p> <p>(In the future), once the solution has been implemented, what is working and what needs to be improved?* (PDCA cycle)</p>	<p><b>Questions:</b> <b>What remaining needs were not addressed by this project?</b></p> <p>What are your recommendations for investigating these remaining needs?</p> <p>What did you learn from this project?</p> <p>How can these lessons learned be communicated?</p> <p>How will the documentation be completed? What happens to it when it's finished?</p> <p>How will this project be brought to a close?</p> <p>How will you celebrate?</p>