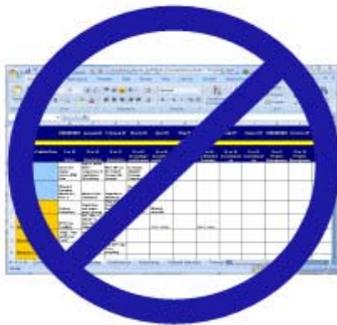


Best Practices of Project Management and Tracking Tools

A solid Lean Six Sigma deployment requires a mechanism for recording, storing, viewing, and reporting on the on-going project work. This level of visibility and transparency drives management support and builds internal awareness of the benefits of continuous improvement. The infrastructure provided by a project management and tracking tool helps Belts to create meaningful reports and standardize the process of project completion.

But most Lean Six Sigma deployments don't begin this way. Management is rarely concerned with project tracking in the early years, instead focusing on the basic block and tackle of training Belts and completing the early, critical projects. A few years in, the lack of a universal project management tool becomes an impediment at all levels of a deployment. Champions spend hours updating metrics and wrestling with bulky, incomplete spreadsheets. Team leaders post data files in multiple locations, with no central repository or standardized electronic format. Executives have no on-demand dashboard for financial metrics, and project team members cannot post or review data at will.



Someone may propose building a home-grown project management tool, but this raises new questions about development time, ongoing maintenance costs, and common pitfalls like: multiple versions of onerous spreadsheets, a lack of file labeling protocols, the inability to merge multiple related documents for reporting purposes, slow file transfer mechanisms, poor tracking of actual financials, and variation in tool and charter templates. The clamor rises and an ad hoc council determines that - surprise! - the best means of solving these growth-related pains is to purchasing a project management and tracking tool to bolster the deployment infrastructure.

The fact that you have arrived at this page means that you are at least mildly interested in informing yourself about your Lean Six Sigma project management options. We would like to help you make a smart decision by pointing out a few things we've learned about project tracking applications in this industry.

Selecting the Right Tool for Your Deployment

So you've been given the mandate to purchase, but with many commercial products available on the market, how do you begin to whittle down your choices? Some critical questions include:

- Do you use an online tool or one with a desktop client?
- Will you need a specialized interface, and how much time and money will be required to realize the required customization?
- Which features are vital and which are "nice-to-haves"?
- How expensive will the tool be to purchase and maintain over the years?



- Perhaps most importantly, if you build it, will the Lean Six Sigma team view it as value-added tool or as a non-value-added, bureaucratic distraction?

We have developed this paper as a way to provide some insights into the most common questions you need to ask and answer as you seek to improve your deployment's project management process. We start with the basic factors you must consider when assessing the value of a project management tool.

The Five Musts for a Project Management Tool

Every project management and tracking tool will include both standard and exclusive features. On the most basic level, this type of tool consists of an underlying database, an interface for users to add or change data, and a reporting system for monitoring and control purposes.



Exclusive features you may encounter can include ERP integration, portal pages, strategy managers, and survey tools. But how much do these impact the day-to-day needs of your deployment?

In our experience, the best management and tracking tools for Lean Six Sigma projects must include these five basic elements, which we will discuss in more detail below:

1. Ease of configuration
2. Visual and intuitive management features
3. Integration with learning and action
4. Flexible, powerful reporting features
5. Relevancy to the work process

Requirement #1: Ease of Configuration

Every Lean Six Sigma and process improvement deployment is unique. Factors such as the company culture, internal processes, legal requirements, or the "flavor" of the deployment (is it Lean, Six Sigma, Design for Six Sigma or a combination of these and other methodologies) have a critical impact on the project management workflow, and so "out-of-the-box" templates are usually a poor fit or short-lived solution. Thus the configuration must be simple and straightforward.



Questions you should consider about configuration:

- Is the program already set up to follow the DMAIC workflow?
- How much customization must be done prior to first use?
- Will you need the help of the vendor or a consultant for pre-launch customization?
- If yes, how long will customization take and how much extra will it cost?
- Once the tool is operational, does your organization have the ability (i.e., an administrative tool) to make additional changes (tweaks) to the interface and database?
- Must you have IT resources to make configuration changes, or can non-IT staff make changes?

- Can you configure it so that individuals or groups (e.g., Champions or Master Black Belts) can have permissions to update fields, lists and options?
- How easy is it to maintain and upgrade the program?
- Can you auto-configure reports?

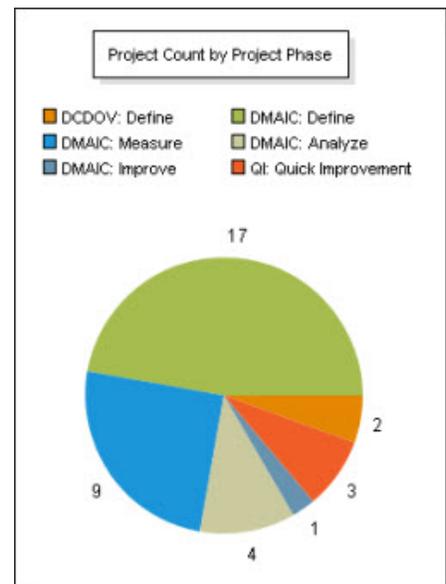
The more control your organization has over the ability to configure, the faster you will be able to set up, run, and adjust your database and interface. Remember that first impressions count: the longer it takes to customize and implement your program, the less confident and enthusiastic will be the employees who have to use it on a regular basis.

Requirement #2: Visual and Intuitive Management Features

The second element you should demand from a project management program is an intuitive, visual interface. By intuitive, we mean an interface that requires little to no hand holding by IT or a MBB to get a Green Belt or Black Belt started. Belts should not have to attend specialized software training classes just to be able to create projects and enter data. Intuitive interfaces contain plenty of help files, how-to links, and annotated dialogs so that the most obvious work-flow questions are answered as soon as they're asked.

As the number of projects grows, the size of the database increases, as does the complexity of tracking. Navigation should be presented consistently on each page and dialog, with the ability to "drill down" in detail as much as you need to understand the data trends. Intuitive features such as summary pages, tabbed reports, and graphic views help to filter out the noise and direct users to meaningful data. Tabs are especially useful ways of segmenting the large amount of collected data into readable bites.

Visuals play a leading role in usability. The dual use of icons and pictures alongside words helps provide a visual cue that draws the eye to next steps and important functions. Color-coded tables and graphs emphasize where work is being (or not being!) done. Color-coded alerts and dashboards also draw the eye towards the most important, time-sensitive details. Bright colors - reds, yellows, greens - should be used judiciously, as overuse can disperse rather than focus attention.



Requirement 3: Integration with Learning and Action

The third critical element is how closely the project management program is integrated with the work and learning processes. The program should align as closely as possible to the phases and processes of the DMAIC, DMADV or



other methodology so as to make it a natural extension of the work flow. Here are a few examples of what we mean:

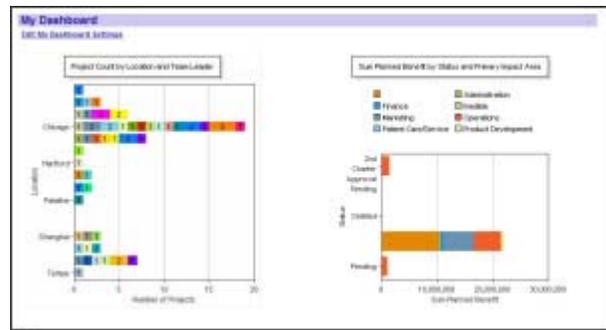
- When a project leader completes an analysis, she should be able to use the program to immediately record the result and answer the appropriate critical question.
- Team members should be able to post and share data files and reports as they are completed, and to alert leaders to the updated information.
- A Black Belt should be able to access an online learning database to review methodologies, definitions, and activities for each DMAIC phase and project step.
- Management should be able to review progress and export project information as they prepare presentations.
- Everyone should be able to submit new project ideas to the database as they are realized.

The Six Sigma practitioner must be able to use the project tracking and management tool to help deliver results.

Requirement 4: Flexible, Powerful Reporting Features

The fourth critical element is robust, flexible reporting to monitor and communicate the day-to-day progress of the deployment. Project management and tracking tools commonly provide two broad categories of reports: online dashboards that monitoring ongoing progress and generated reports that represent snapshot views of activity.

With online dashboards, top-level executives, Champions, and Deployment Leaders can immediately view the a partial or complete state of the deployment when logging into the management program. Leaders must be able to select and configure these views (e.g., project status by location, by DMAIC phase, by Black Belt) such that they allow for a quick, meaningful overview of metrics and Key Performance Indicators (KPIs). Dashboards must provide visual alerts for cost overruns, project delays, and other undesirable states.



For generated reports, you should expect flexible, time-saving features such as configuration wizards, templates, and auto-configuration tools. When creating reports, you should be able to segment reports for different groups or individuals, receive separate reports for finance and progress, and establish rules for report standardization. Desirable features include the ability to email reports directly to a group, order and categorize reports, and receive financial reports in a calendar view.

Requirement 5: Relevance to the Work Process



And finally, a project management and tracking tool must be relevant to the ways in which Belts work. A project management tool must add value - not just work - to the employee's job. Admittedly, relevance cannot be directly measured in the planning stage, but without it, there's no guarantee that Belts will correctly use the program. In other words, if you build it, will they come to view it as an enabler or an obstruction to their daily work?

Many deployments leave the selection process to Champions and executives who base their decision on budgetary and operational factors such as pricing, feature lists, and scalability. No one on the committee "walks the line" to see whether or not an ill-conceived interface, a poor data-entry work flow, or even a slow processing speed would be a serious deterrent to the work flow. These types of concerns pass undetected and become the responsibility of the post-purchase IT team, who may or may not be able to fix them. The result: a half year later, you've gained a database of incomplete or incorrectly entered data, and even the most dedicated employees have become stymied by the system.

One way to avoid a lack of relevance is to include belt-level employees in the tool selection process. These individuals can act as the Voice of Customer to help prioritize the CTQ (Critical to Quality) program features. With the permission of the vendor, you can set up a trial environment where several Belts can test-drive the program by entering completed projects in the manner in which they were originally run. Executives can also vet the interface by generating test reports and dashboards to compare the expected and actual output. At the end of the trial period, you will have proved the relevance of the tool and earned the support of the deployment.

How Does MoreSteam's TRACtion® Align to These Best Practices?

TRACtion by MoreSteam is a Web-based project management and tracking software that provides a ready infrastructure to support Lean Six Sigma deployments. TRACtion provides all five basic elements described above and is designed for a one-day setup process involving no programming.



Learn more about TRACtion through our [online Feature Tour](#) or [contact MoreSteam.com today for a live demo](#).

About MoreSteam.com

MoreSteam.com is the leading global provider of online Lean Six Sigma training and blended learning technology, serving over 1,200 corporate clients and over 20% of the Fortune 500 with a full suite of Lean Six Sigma e-Learning courses, EngineRoom® data analysis software, TRACtion® online project tracking software, Crucible™ online testing, and SigmaSim® online DMAIC simulations and games. MoreSteam.com was launched in the year 2000 in response to the high cost of traditional Six Sigma training and tools. MoreSteam's mission is to enable people to advance the performance of their organizations by delivering powerful tools for process improvement to the widest possible audience at the lowest price available. More information about online training from MoreSteam.com is available at: <http://www.moresteam.com>.