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- 1.2 Confirm team membership.
- 1.3 Agree on team member roles.
- 1.4 Agree on team rules and operating values.
- 1.5 Select team name.
- 1.6 Review "Teamwork" guidelines.
- 1.7 Agree on plan and schedule.

#### **Step 2 Research Customer Needs and Expectations**

- 2.1 Identify customers.
- 2.2 Decide scope of research.
- 2.3 Decide research strategy.
- 2.4 Plan target contact and analysis.
- 2.5 Develop/structure instruments for research.
- 2.6 Execute research.
- 2.7 Analyze and interpret data.
- 2.8 Conclude on needs, issues and expectations.

#### **Step 3 Select the Issue**

- 3.1 Compile customer issue statements and rank issues.
- 3.2 Select highest priority process.
- 3.3 Confirm selected processes are within mandate.

#### Step 4 Define/Design the Process

- 4.1 Agree on purpose of the process.
- 4.2 Define scope of process.
- 4.3 Define inputs and suppliers.
- 4.4 Define process activities.
- 4.5 Define process outputs and customers.

- 4.6 Define the process operating requirements.
- 4.7 Verify process definition by observation.
- 4.8 Collect ideas for process improvement.

#### **Step 5 Establish Standards and Design Performance Measures**

- 5.1 Check process capability.
- 5.2 Examine process capability in more detail (optional).
- 5.3 Write standards.
- 5.4 Plan negotiation.
- 5.5 Negotiate standards with customers and stakeholders.
- 5.6 Design how you will update standards.
- 5.7 Determine critical measurement points.
- 5.8 Design performance measures.
- 5.9 Determine measurement approach.

# Step 6 Implement the Processes, Standards, Measures and Quality Systems

- 6.1 Determine necessary procedures, work instructions, role descriptions and training materials.
- 6.2 Develop training materials and plan implementation.
- 6.3 Train the trainers (optional).
- 6.4 Train people and implement plan.
- 6.5 Confirm implementation and data collection accuracy.
- 6.6 Implement auditing of processes.

#### **Step 7 Confirm the Process/Issue Focus**

- 7.1 Monitor and review performance measures.
- 7.2 Identify activities needing improvement.

- 7.3 Determine activities (if any) to receive next level of analysis.
- 7.4 Identify whether new owner and team is required.

#### **Step 8 Set the Improvement Objectives and Schedule**

- 8.1 Review performance to standard gaps.
- 8.2 Identify performance areas to be improved.
- 8.3 **Prioritize areas and select those for improvement.**
- 8.4 Set milestone performance targets with achievement dates.

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- 9.1 Brainstorm a list of causes.
- 9.2 Draw the Fishbone Diagram and organize the causes.
- 9.3 Revise the Fishbone as better information becomes available.

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- **10.1** Determine what information is required.
- **10.2** Decide on the data gathering approach and method.
- **10.3** Gather the data.
- 10.3.1 Prepare for data collection.
- **10.3.2** Gather the data.

10.4 Summarize and analyze the data.

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- 11.1 Choose the next cause to work on.
- **11.2** Confirm that solutions can be defined.

#### **Step 12 Formulate Alternative Solutions**

#### Step 13 Evaluate and Select the Best Solution

- 13.1 Confirm understanding of each alternative solution.
- 13.2 Select a solution.

#### Step 14 Investigate and Validate the Solution

- 14.1 Decide on the experiment approach and method.
- 14.2 Conduct the experiment.
- 14.3 Summarize and analyze the data.

#### **Step 15 Document Solutions**

- 15.1 Write the solution summary.
- 15.2 Revise or develop procedures, work instructions, role descriptions and training materials.
- 15.3 Present solution.

#### Step 16 Investigate and Validate the Solution

- 16.1 Develop a brief implementation plan.
- **16.1.1** List the implementation steps.
- 16.1.2 Developing a work plan.
- 16.2 Design training method and materials with leaders.

16.3 Execute implementation plan and training.

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