



Presents...

Continuous Improvement

Planning to Improve





About Me



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Beth Livingston

- Master's in Instructional Design
- 25+ years as a Business Analyst and Project Manager

Owner



Director





What Is Continuous Improvement?

- A mindset
- Looking for better ways to do things
- Become more effective and efficient (efficacious)
- Remove waste or inefficiencies from intangible processes
- Create a better end product in a more efficient way





The Objective

Turning thoughts into actions.



1. 5 frogs are sitting on a log.
2. 4 of the frogs decide to jump off.
3. How many frogs are left?



The Objective

- What do you do well?
- Where do you struggle?
- What seems broken?
- What is starting to crack under the pressure of growth?
- Develop a plan





4 Types of Continuous Improvement

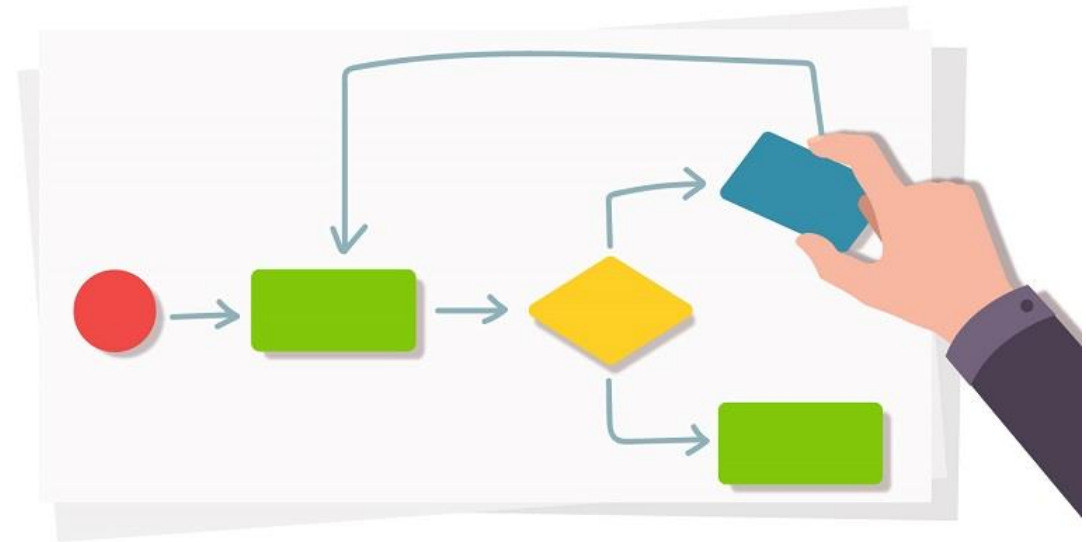
1. Business Process Improvement
2. Project Process Improvement
3. Self Improvement
4. Agency Improvement





Business Process Improvement

- Accounting/Invoicing
- Hiring Outside Resources
- Onboarding Resources
- Decision-Making
- Raising Prices
- Etc.





Project Process Improvement

- Proposal/Contract
- Discovery
- Controlling Scope Creep
- Managing Clients
- Guaranteeing On Time Delivery
- Etc.





Self Improvement

NEVER STOP LEARNING!

- Be a better:
 - salesperson
 - people/client manager
 - project manager
- Automate
- Potential new services and products
- Web development and maintenance skills





Agency Improvement

- Your Client Base
- Networking
- Building Industry Relationships
- Building Local Relationships
- Outsourcing
- Implementing Best Practices
- Spending Time ON the Business (not IN it)





The Best-Practice Process

1. Identify Lessons Learned – Good and Bad
2. Test the Improvement
3. Assess the Result and Adjust
4. Develop Best Practices
5. Implement Best Practices





Best Practices

1. Lay the groundwork
2. Lessons Learned Log
3. Be Intentional
4. Create a Plan (a project)

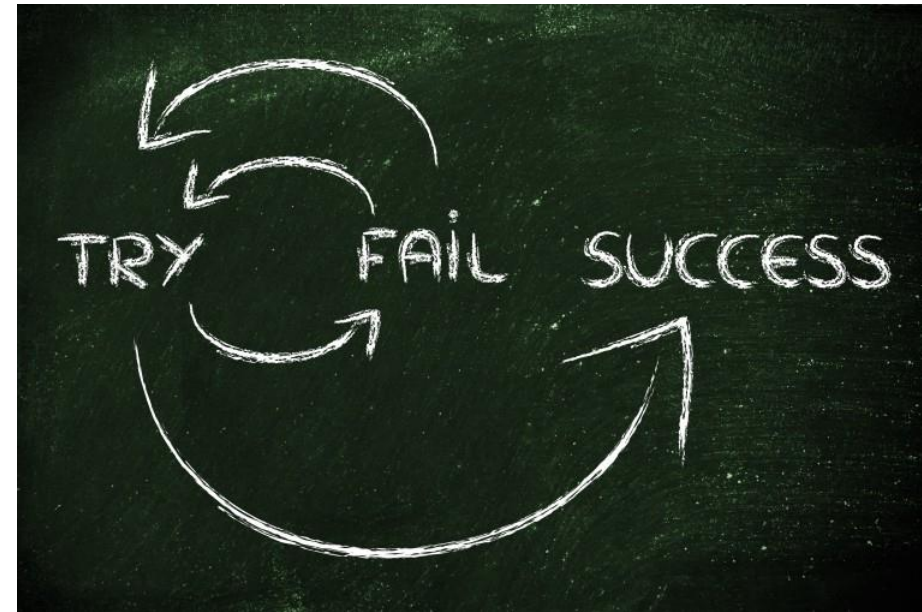




What are Lessons Learned?

Experiences distilled from a project that should be actively taken into account in future projects.

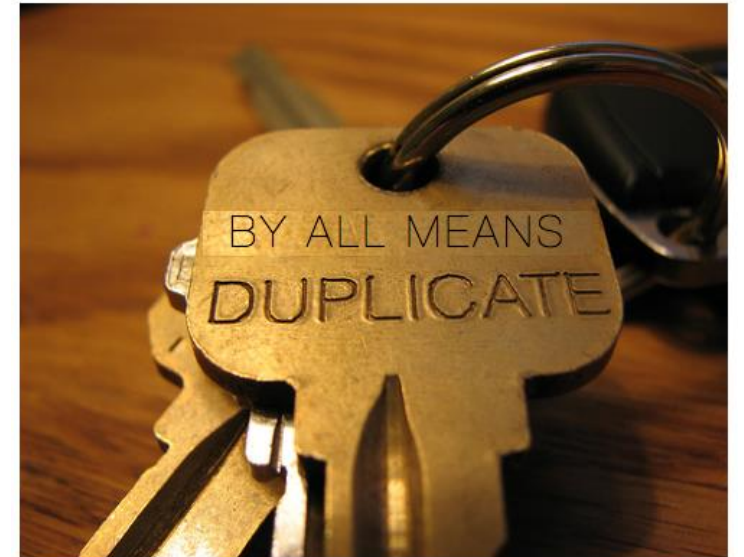
- What went right? Why?
- What went wrong? Why?





Why are they important?

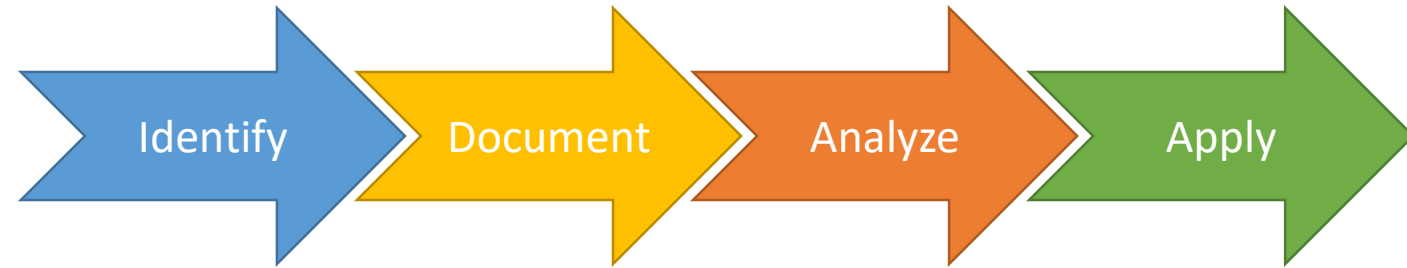
- Avoid problems happening again in the future
- Identify general process improvements
- Duplicate success
- Build upon the successes and lessons of prior projects





The “Lessons Learned” Process

1. Identify
2. Document
3. Analyze
4. Apply





Ways to Identify Lessons Learned

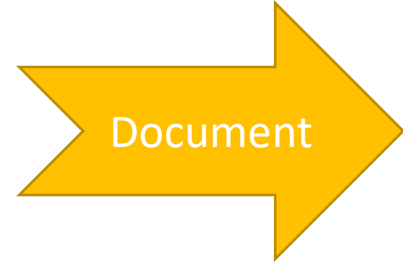
Identify

- Throughout the project (but you won't)
- Project Debrief meetings
- Surveys
- Review Status Reports
- Review Risk and Issues Logs
- Review the Project Notebook





Documenting Lessons Learned



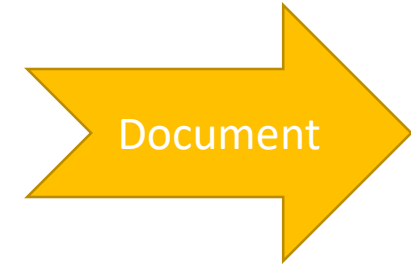
- Use a Repository
- Use Categories





Repositories

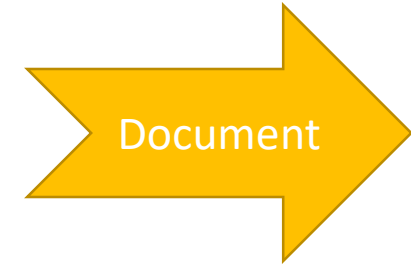
- Spreadsheet
- Database (MSAccess, Airtable)
- Lessons Learned Software





Categories

- Lead Acquisition
- Pre-Proposal
- Proposal/MSA
- Onboarding
- Project Planning
- Technology/Stack
- Development
- Testing
- Deployment
- Training
- Tracking/Measurement
- Project Closeout
- Offboarding





Analyzing Lessons Learned



- When there are a lot in 1 category
- You want to update a process
- Anytime you have natural downtime





Analyzing Lessons Learned

The 5 Whys

- A “thinking tool” for identifying the root cause of problems.
- Helps to:
 - move past blame
 - think beyond the specific context of a problem
 - identify a proper solution to improve
- Start with a problem statement, and then ask “why” until the root cause is revealed and the answers become silly.





The 5 Whys - Example

Problem: Our blog writing process is slow.

- **Why?** Blogs are usually tossed around between several team members and go through several editing cycles.
- **Why?** Because we don't have anyone owning that process, so it seems like it's everyone's responsibility and no one's responsibility at the same time.
- **Why?** Because we never decided on a clear process for blogging.
- **Why?** Because...we're busy?



Applying Lessons Learned



- Creating and improving templates
- Creating and improving processes
- Implementing automation where possible

Application =





Applying Lessons Learned



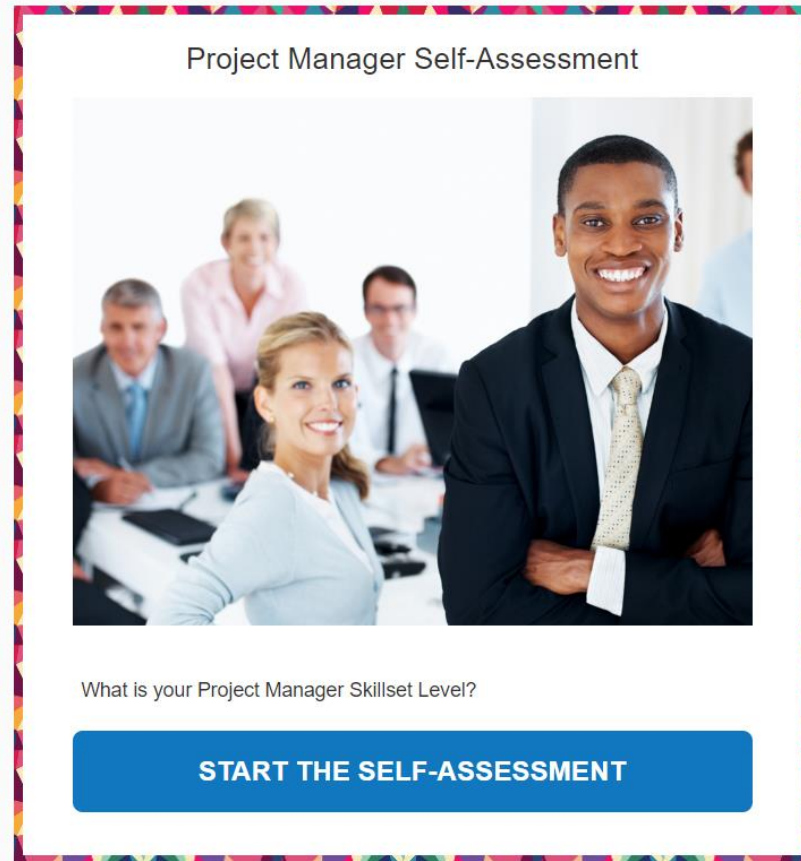
1. Document
2. Test
3. Adjust
4. Adopt

Application =





How to Learn More



You might already BE a project manager.

Take the free Project Manager quiz on our home page to find out.

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How to Learn More

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Price will be increasing this year.

All certifications will be moved into
the Premium program.

Thank You!




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Project Manager Self-Assessment



What is your Project Manager Skillset Level?

START THE SELF-ASSESSMENT

WP PROJECT MANAGER'S ACADEMY

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