



## Lean Fox Solutions

**Health Care**

**Manufacturing**

**Services, Technology & Sales**

## Supporting Directions and Decision Improvement A3 Outline

### **Problem or Opportunity Statement:**

The opportunity to address is to apply Lean Six sigma methods and tools to our Supporting Direction and Decision processes to eliminate waste and improve flow. To simplify, make uniform, and get better results.

### **Objective and Scope:**

The scope of this work is the Supporting Direction and Decision processes. The objective is to apply Lean Six sigma methods and tools to this area to eliminate waste and improve flow of serving our customers, as well as supporting our overall sales growth rate and profit. The bottom line is we want to improve and streamline our customer service processes with the same (or fewer) sales resources.

### **Current State:**

The team mapped out the customer on-boarding process, and learned that there were several key improvement opportunities.

The biggest problem with the current state was reconciling the proposal with the actual agreement, and getting the proper customer information uploaded into the system. The cause of these issues is believed to be the poor performance with the CRM system, and multiple proposals developed during the RFP process. The team felt that as the other areas made improvements the on-boarding process would improve as well.

### **Ideas and Opportunities:**

Improve the new customer on-boarding process. This process overlaps or links to the RFP process.

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### **Future State:**

Instead of the customer service people dreading the on-boarding process, and the new customer becoming frustrated with multiple questions that they may feel they've answered before; the future state is envisioned to be a smooth and pleasant process for the customer and the internal customer service and support people.

### **Future Ideas and Opportunities:**

An idea did come up during the team's kick-off session that the entire process needs to be aligned and tied together, and that perhaps different organization of sales teams may help.

### **Action Plan and Timeline:**

To help facilitate the customer on-boarding process the team's primary objective is to document the required information for properly on-boarding new customers. The team began to do this during the kick-off session, but ran out of time and scheduled another session. The team believed that their end product would be a detailed check-list to be followed by the sales team when they land a new customer. This and appropriate training on the requirements were worked into a 12 week work plan.

The team also designed into their work plan the development of survey instrument to capture the impression of the customer through the on-boarding process.

### **Key Measures of Success:**

The key success measure for the on-boarding improvement team is the impression of the customer regarding how smoothly the process goes. To capture this measure, the team will develop a survey instrument, and establish a base-line data point for reference and improvement tracking.

The team believes that if they can improve the overall impression of a new customer through the on-boarding process, that the organization may gain more business, and have a positive impact on the Macro SZles Process metrics of,

1. New sales \$ per sales resource
2. New Customers per sales resource
3. New sales \$ with existing customers per sales resource

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### **Initiative Actions and Outcomes:**

The team continued to meet weekly over the next couple of months. Through the development of the current state map shown below, the team clearly identified the major improvement opportunity of improving the CRM data entry on customer on-boarding. Through the monthly team sessions Bill was conducting the team knew that this topic was also being addressed by Jack and Julie's team. Amy and Tom set up a couple work sessions with Jack and Julie to ensure that these areas were being addressed appropriately.

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