Detailed Lean Improvement Project Report
For the June 1, 2014, through December 30, 2014, reporting period

Agency name:
Office of Financial Management

Improvement project title:
OFM Conference Room Readiness Problem-Solving A3 Workshop

Date improvement project initiated:
05/20/2014

Summary:
The Office of Financial Management is improving the Conference Room Readiness process to increase process efficiency and customer satisfaction. The time to setup and ensure a workable conference room takes time away from agency business functions and so the goal of this effort is to understand, through root-cause analysis, the reasons behind lack of readiness and select the approach to reduce setup time for technology-equipped conference rooms within OFM's control.

Details:

Description of the problem: Conference room users encounter variable levels of readiness when arriving at technology-equipped rooms in order to use them. Some staff can work the technology but some need to figure it out or ask for help. Sometimes, keyboards need batteries, troubleshooting or resetting or even replacement. The team will be coached to search for opportunities to decrease variability in the process, reduce risk, and improve the customer experience. For meetings with technology required, it is believed to take roughly 15 – 30 minutes per meeting to preview and assess the conference room readiness (get batteries, find another keyboard, locate equipment, get instructions for system use). OFM does not currently have a standard approach for outfitting conference rooms. Organizers may inadvertently book rooms that don't have sufficient capacity for the business need.

A problem-solving A3 workshop began planning in May 2014 and the event was held in July 2014.

Specific results expected:
Goal: Efficient and effective use of agency resources through reduction of setup time for standard room usage from 15 – 30 minutes to around 5 minutes per meeting. To prevent mistakes created by lack of understanding about room size, condition, equipment and capacity.

Description of the improvements:
1) **Conference Room Supply Kit**
   Meeting setup is often delayed because the meeting sponsor doesn't have all the supplies necessary to facilitate a meeting. This can include items such as new batteries and markers for the board.

Countermeasures: On a test basis select conference rooms will have a "standard supply kit" placed in the room. Feedback will be solicited on the effectiveness of the supply kit by calling the meeting sponsor after the meeting has occurred and asking a standard set of questions.

What we learned? Initially there were going to be phone calls made to 10 meeting organizers with questions about the improvements. This ended up being difficult due to individuals' schedules. Just recently a Survey Monkey survey was created and sent out to a majority of the meeting organizers. Out of 9 meeting organizers, there have been 5 responses, some of them with very helpful input. It is intended to use this input to drive which improvements on the board to test next, as well as assess what failed with the current improvements.

2) **Meeting room setup instructions placed in room**

Meeting setup is often delayed because the room wasn't "reset" after the prior meeting. This can include tables arranged haphazardly, chairs scattered around the room, equipment left in random places, etc. It then takes time for the sponsor of the current meeting to locate equipment and arrange the furniture back to the standard configuration.

Countermeasures: On a test basis select conference rooms will have a "standard rules of use" placed in the room in a conspicuous place. Feedback will be solicited on the effectiveness of the setup instructions by calling the meeting sponsor after the meeting has occurred.

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3) **Equipment instructions placed in room**

Meetings are often delayed because the meeting operator is unfamiliar with how the equipment (projectors, keyboards, electronic boards) in the conference rooms work.

Countermeasures: On a test basis select conference rooms will have a "equipment instructions" placed in the room in a conspicuous place. Feedback will be solicited on the effectiveness of the instructions by calling the meeting sponsor after the meeting has occurred.

What we learned? Initially, there were going to be phone calls made to 10 meeting organizers with questions about the improvements. This ended up being difficult due to individuals' schedules. Just recently a Survey Monkey survey was created and sent out to a majority of the meeting organizers. Out of 9 meeting organizers, there have been 5 responses, some of them with very helpful input. It is intended to use this input to drive which improvements on the board to test next, as well as assess what failed with the current improvements.

How we involved customers or stakeholders in this effort:
We included staff from OFM and the Governor's Office and other operators in the process to help find areas to improve. Customers will continue to be asked for feedback on the process. This feedback is reviewed by the process owner and key operators and used to continually improve the process.

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