

Strategic Lean Project Report



Training Request Process Improvement Project

Agency: Office of Financial Management

Partners and Customers: We included staff from many of the divisions in OFM, employees, hiring supervisors, fiscal and human resources in the process improvement team to help find the key areas to improve, generate ideas and decide which ideas to pursue. Throughout the project, customer involvement was gathered and used to adjust the decision tree and form until they received great feedback.

Project Impact

The Office of Financial Management improved the Training Request Process, resulting in employees no longer having to complete and get signed approvals for no-cost trainings which resulted in cost and time savings, for example, decreased cost of paper for forms previously required from a minimum of \$18 annually (approx. 300 forms x .06 cents a page) to \$0 annually. Additionally, annual time-savings for employees no longer having to complete and get signed approvals for no-cost trainings results in less touch time by employees from a minimum of 3000 minutes annually (approx. 300 forms x 10 minutes) to 0 minutes annually.

Project Summary

The Office of Financial Management improved the Training Request Process. An improvement team was able to streamline the process for an employee requesting training while still ensuring that needed supervisory and budget approvals are considered. The process for requesting training was unclear to employees and approving authorities causing various points of rework and/or miscommunication. The team wanted employees to have it very easy to navigate the process and only to produce a form when needed. In cases where training is mandatory and no cost is associated, there should be no form completed. The team really sought to reduce waste in the process realizing that that value was created predominantly when the learner was actually learning in the training itself.

There were roughly 25 forms/month (300 annually) required for no-cost trainings compared to our target of 0 forms required for no-cost trainings, which we wanted to reach by 12/31/2017.

- **A clear, simple process** – A new decision tree for the training process was created for the internal internet (Inside OFM) and this was tested with employees to ensure it made following the process clearer.
- **A simplified form to support the process** - A simplified form, for the cases where a form is still needed, was developed that addressed some confusing and outdated areas and by cleaning and clarifying the form it will enable employees and approving authorities to complete it more easily and accurately.
- **A new policy** - A policy update was made to reflect the changes to the process including no longer requiring a form for no cost trainings.

Project Results



Cost

Decreased cost of paper from a minimum of \$18/year to \$0/year.



Minimum Annual savings of \$18 in paper cost



Time

Decreased touch time to complete form from a minimum of 3000 minutes (300 x 10 min) to 0 minutes for no-cost trainings.



Minimum Annual savings of 50 hours staff time

Date improvement project was initiated: 2/22/2017

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