



Lean Government

Region 10 New Personnel Workstation Setup Process

Lean Event Case Study

Summary

EPA Region 10 conducted a Lean kaizen event to improve the efficiency of its User Management Request (UMR) process in March 2011. The UMR process is a procedure that the EPA Region 10 office uses to provide new employees, transfer employees, interns, contractors, and volunteers with a functional workstation. This process includes the provision of hardware, software, phone service, an email account, access to library and records management systems, system training, health and safety training, and other services required to conduct business. The UMR system relies on an IT management software package, which had last been updated in 2010 prior to the event.

The objective of the event was to reduce the time required to complete the UMR process for new employees and other new system users. During the five-day event, the Lean team exceeded its original goal of reducing lead time by 50 percent, instead identifying process improvements that would result in a 74 percent reduction in lead time. The team worked to implement the identified improvements in the months following the event, and despite some challenges in scheduling necessary software changes, the new process has shown notable results.

Results

Participants in the Lean event created a new process for UMR in Region 10 that is more efficient than the old process. They set a goal to reduce lead time by 50 percent, and developed targets for the time to gather data prior to a new user’s arrival. These targets were designed to reduce time at each stage of the process, and included a target to complete data gathering at least six days prior to a new user’s arrival.

The team achieved a new future state process that reduces lead time by 74 percent and cuts the number of steps in the process by 34 percent. The following table displays performance metrics and targets for the new process, which has been successfully implemented.

Metrics	Starting State	Target	Target % Change	New Process Results	New Process % Reduction
UMR Lead Time	19.5 days	10 days*	50%	5 days	74%
Number of Steps	140 steps	[No target set]	[No target set]	92 steps	34%

**Revised target based on 50% reduction goal and updated information about starting state lead time*

Scope of the Lean Project

Project Scope: The User Management Request process from the request submittal to installation of the workstation

Goals

The goals of the event included:

- Reduce UMR process lead time by 50 percent
- Develop targets for the time for office analysts and PC coordinators to gather data

Process Changes and Improvements

During the kaizen event, participants developed and analyzed a current state map of the UMR process and used it to identify potential improvements that would result in an improved future state. Participants split into two teams to identify potential improvements after dividing the current state map into two phases. Participants utilized the “5 Whys” method to determine the sources of waste in the process, and then identified non-value added process steps and rework that could be eliminated.

The new process is designed to achieve the following processing times:

- UMR data gathering is completed by 6 days prior to the new user’s arrival
- Equipment is delivered and operational by 1 day prior to the new user’s arrival
- Information entry into Microsoft Active Directory server is complete by 3 days prior to the new user’s arrival
- Lotus Notes software is installed and operational by 2 days prior to the new user’s arrival
- Oracle software is installed and operational by 2 days prior to the new user’s arrival

Changes that the team identified to achieve the efficiency improvements in the future state process included the creation of:

- Checklists
- An employee instruction sheet to help new employees understand the process
- Standard forms and procedures
- A data-maintenance process

As part of these improvements, the team developed standard work for the new standard UMR form. Participants proposed several changes to the software used to manage the UMR process in order to achieve improvements. Figure 1 shows the team’s draft of the new standard work form that the software now generates automatically. The new software also utilizes a new visual control status bar to track the progress of the UMR process from start to finish.

Finally, the team developed a communications strategy to explain the new process throughout the regional office and to solicit feedback during the implementation phase.

Implementation

Following the event, the team initially encountered challenges in scheduling the software contractor to make the changes to the UMR management system, which delayed full implementation of the process improvements. During this phase, the team worked to complete data gathering, design details, and a list of requirements for modification to provide to the software developer. The team also implemented a communication strategy to promote the new process throughout the office, and met with various groups to introduce upcoming changes, solicit feedback, and answer questions. At the team’s 45-day report-out, even before the software developer was able to make the planned changes to the system, the team announced that it had observed some improvements in process efficiency. This may have been the result of the team focusing more attention on the UMR process, and applying Lean thinking learned during the event to everyday work.

Figure 1: New Standard User Management Request Form

In October 2011, the programmer was able to implement the program system changes that were designed by the kaizen event team. One new addition in the system is a visual control indicator that shows the system user where a request is in the process, as shown in Figure 2.

In November 2011, the UMR kaizen event team leader and manager of the UMR process reported that of the 11 UMRs processed that month, 100 percent were accurately completed within the six-day target window after the completed request was fully entered.

As of one year after the event (March 2012), all of the deliverables that the team identified during the event have been completed. “Buy-in” from managers during the process improvement implementation has been excellent, which helps to ensure that the improvements achieved will be maintained into the future. Improvements include:

- New users are now provided with a one-page document explaining how to log into their computers for the first time and who to call for technical support
- Tasks that were identified during the event as duplicative have been eliminated
- Increased visibility of the process that resulted from knowledge of the event helped ensure that improvements would remain in place

Delivery of a phone, computer, software, and access to internal systems is completed within five business days of a new user’s arrival in 90 percent of cases. The regional office is now considering holding a Lean event on the de-provisioning process.

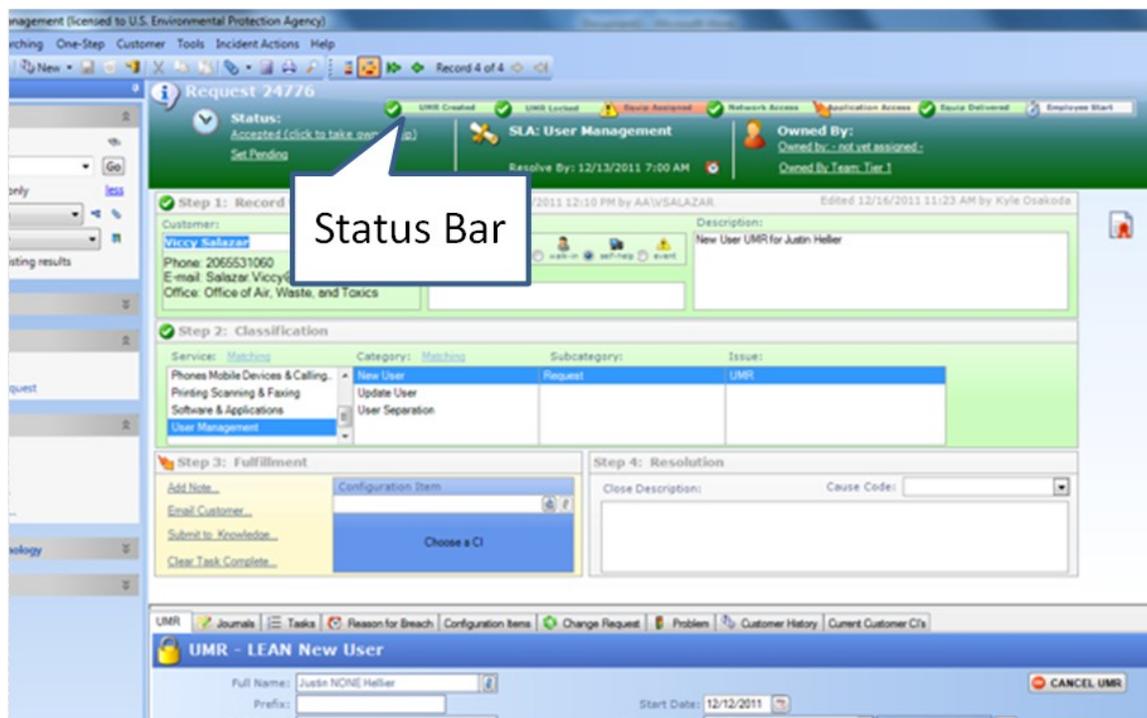


Figure 2: Tracking Software with New Visual Control Status Bar

**For More
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