4IRConsult

Operational Excellence in the Digital Age

Operational Excellence Training Overview

Version 1.2

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INTRODUCTION

Operational Excellence is facilitated in an organisation by 4IR Consult through a combination of training, mentoring and consulting. All courses can be offered as stand-alone modules or part of an integrated OE Programme:

Classroom Based Courses

	OE Executive Overview — 1 day	
OE Foundation — 3 days	Management by Metrics — 2 days	Quality Management — 2 days
Problem Solving — 2 days	Process Understanding & Management — 4 days	Process Optimisation — 2 days

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CLASSROOM BASED COURSES

The classroom-based courses are designed to provide all staff in leadership or technical support roles a detailed understanding of the OE principles, tools and techniques. The following courses can be provided individually or as part of an integrated OE Programme.

	1 day
	OE Executive Overview

3 days	2 days	2 days
OE Foundation	**Management by Metrics**	**Quality Management**

2 days	4 days	2 days
Problem Solving	**Process Understanding & Management**	**Process Optimisation**

1 day
OE Executive Overview

OE EXECUTIVE OVERVIEW

The OE Executive Overview course is aimed at an organisation's executive and senior leadership team. It provides the audience with a good understanding of the need for Operational Excellence and a typical OE journey. It provides insight into the principles of servant leadership, empowerment and the learning organisation. It then covers creating a sense of purpose for staff members and building a service culture.

The OE Executive Overview course is an important element in gaining executive buy-in and commitment to a journey to Operational Excellence.

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OE FOUNDATION COURSE

The OE Foundation course lays the foundational thinking that the rest of the OE courses build upon. It introduces the learners to the need for Operational Excellence in an organisation as well as the workings of an integrated OE Programme. It then goes on to challenge their thinking about who they are as servant leaders and their role in managing processes and process resources.

Furthermore, it introduces critical thinking around building a learning organisation; systems thinking; client centricity; the relationship between process execution, client experience and brand integrity; instilling a clear sense of purpose in their teams; listening with intent to the client; and creating a strong internal service culture that supports an excellent external service culture.

The following modules are covered in the OE Foundation Course

Module	Description of Module
Introduction to OE	This module introduces the learner to the concept of Operational Excellence and why it is important in an organisation.
Brand, Customer Experience and Process	This module explains how a company's brand, the customer's experience of interactions, and processes need to be aligned.
The OE Leader	This module discusses the desired way an OE leader behaves and leads their team.
Intrapersonal Skills	This module introduces the learner to the concept Challenge our Thinking, Personal Mastery and Systems Thinking
Sense of Purpose	This module discusses why teams need to have a strong sense of purpose, linked to the organisation's purpose and vision.
Creating a Service Culture	This module teaches the learner about the elements of a strong service culture with a specific focus on internal service culture.
Voice of the Customer	This module discusses the numerous ways in which to gather what the customer wants and thinks of a company or department.

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MANAGEMENT BY METRICS COURSE

The Management by Metrics course establishes a good understanding of the basic data principles required to effectively manage an operational environment. It introduces important principles such as the normal distribution, central tendencies, variation, standard deviation and the different distribution types found in operations. It then goes on to teach the learner how to interpret different graph types as well as how to build a management by metrics framework for their operational area. Finally, it provides the learner with an understanding of the most commonly used operational metrics.

Module	Description of Module
Understanding Data	This module introduces the learner to some basic statistical principles which are used within Management by Metrics.
Graphical Data Analysis	This module teaches the learner about the various graphical data analysis techniques used in Operational Excellence.
Management by Metrics Basics	This module teaches the learner how to establish a measurement framework as well as validating measurement methods.
Process Duration Measurement	This module introduces the learner to the lead and cycle time measurements.
Cost per Transaction Measurement	This module teaches the learner how to measure the cost of processes.
Contact Centre Metrics	This module introduces the learner to the common metrics used in managing a contact centre environment.

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QUALITY MANAGEMENT COURSE

The Quality Management course introduces the learner to the importance of quality in providing an excellent service and reducing operational costs. It also teaches the learner about measuring quality, calibrating measurement systems, determining optimal sampling sizes and executing quality management in an organisation.

Module	Description of Module
Introduction to Quality Management	This module introduces the learner to the basics of quality.
Measuring Quality	This module teaches the learner how quality is measured and reported in an organisation.
Establishing a Quality Management System	This module teaches the learner about establishing a quality management system in an organisation.

PROBLEM SOLVING COURSE

The Problem-Solving course introduces the learner to the importance of building a Continuous Improvement culture in an organisation. It then takes the learner through the popular A3 problem-solving methodology which can be used to solve less complex process problems.

Learners who want to solve more complex process problems are encouraged to do the Lean Six Sigma Green Belt course.

Module	Description of Module
Continuous Improvement	This module teaches the learner the principle of Continuous Improvement and why it is important in an organisation.
A3 Problem Solving	This module teaches the learner how to solve process related issues using the A3 Problem Solving methodology.

PROCESS UNDERSTANDING & MANAGEMENT

The Process Understanding & Management course provides the learner with a good understanding of how processes work, how to determine the critical process inputs, how to govern process changes and how to manage process performance and critical inputs on a day to day basis.

Module	Description of Module
Process Visualisation	This module introduces the learner to the multiple dimensions in which processes can be graphically represented.
Process Roles	This module introduces the learner to the critical roles required to manage processes in an organisation.
Process Change Governance	This module introduces the learner to managing the review and approval of process changes in an organisation.
Input & Risk Analysis	The module teaches the learner how to use the XY Matrix and FMEA to identify process inputs and associated risks.
Standardisation & SOPs	This module teaches the learners about standardising the way they work and documenting their working practices in Standard Operating Procedures.
Stability & Capability Management	This module teaches the learners about measuring process stability using Statistical Control Charts as well as measuring a process's short term and long term capability to meet customer expectations.
Workforce Capacity Management	This module introduces the learners to the basic concepts around workforce management including forecasting and scheduling.
Productivity Management	This module introduces the learners to the basic concepts around productivity management used in back office environments.

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PROCESS OPTIMISATION

The Process Optimisation course teaches the learner how to optimise process performance by organising their workplace, identifying and eliminating waste and optimising how work flows through the process to improve customer lead time.

Module	Description of Module
The Organised Workplace	Using the 5S principles, this module teaches the learner how to organise their workplace for optimal efficiency and safety.
Identifying and Eliminating Waste	This module teaches the learner how to analyse their processes to identify and remove non-value adding activities (waste).
Time Study Analysis	This module teaches the learners how to perform a time study analysis of their processes for both continuous and batch processing.
Process Flow Optimisation	This module teaches the learner how to determine and optimise the process rhythm to meet customer demand utilising Theory of Constraints.

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