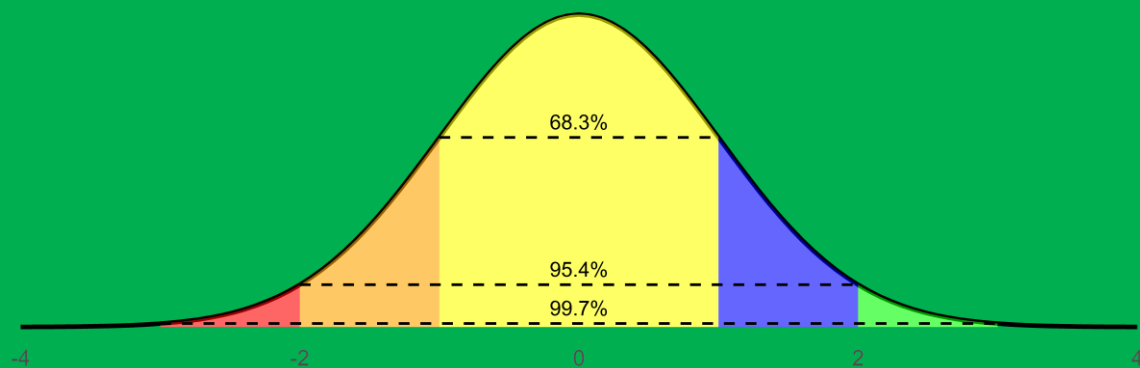


# Understanding 6 Sigma Tools In 6 Minutes



Daniel Zwillinger, PhD

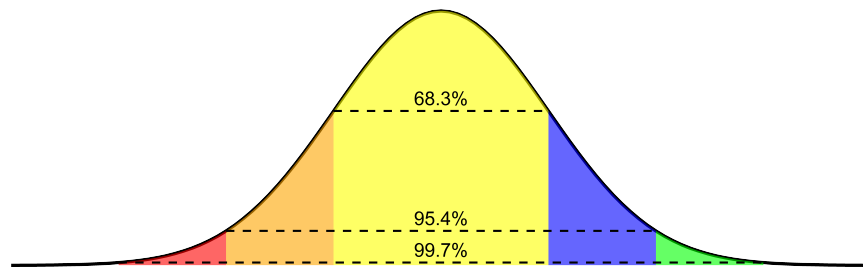


# Understanding 6 Sigma Tools In 6 Minutes



Daniel Zwillinger, PhD

# 6 $\sigma$ in 6



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By Daniel Zwillinger, PhD

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# Introduction

While “Six Sigma” means different things to different people, everyone agrees that there are many useful Six Sigma tools; each is also a useful business tool. Knowing which tools are available, what they do, and how to use them is needed to be a successful Six Sigma or Lean Six Sigma practitioner.

The “Six Sigma in Six Minutes” (6in6) paradigm is that basic understanding of a Six Sigma tool’s capabilities can be described in Six Minutes, using two PowerPoint slides. The first slide describes the concept, the second slide gives an example. Each 6in6 presentation delivers basic familiarity with a tool; enough information to determine if a tool is useful for a specific purpose.

The generic layout for a single presentation is

The image shows two generic 6in6 presentation slides for a 'Check Sheet' tool. The first slide, titled 'Check Sheet', includes a 'Title' box, a 'Problem Addressed' box, and a 'Difficulty' box. It contains a 'Definition & Description' section, an 'Input / Process / Output (IPO) Description' section, and a 'Graphic' section. The second slide, titled 'Check Sheet – Several Examples', shows two examples: 'Obtaining the distribution of an item' and 'Counting defective items'. It includes a table for 'Defects observed' and a graphic of a yellow car with various defects marked.

For example, the two slide presentation for Fault Tree Analysis is

The image shows two 6in6 presentation slides for 'Fault Tree Analysis (FTA)'. The first slide, titled 'Fault Tree Analysis (FTA)', includes a 'Problem' box, a 'Difficulty' box, and a 'FTA Process' section. It contains a 'Definition & Description' section, a 'Graphic' section showing a fault tree diagram, and a 'Problem' section. The second slide, titled 'FTA – Example – Pumping Water', includes a 'Problem' box, a 'Difficulty' box, and a 'FTA Process' section. It contains a 'Definition & Description' section, a 'Graphic' section showing a fault tree diagram for a pumping water system, and a 'Problem' section.

For users new to a specific Six Sigma tool, the information in a 6in6 presentation can show

- Why you might use that tool.
- What factors are considered when using that tool.
- What result can be obtained using that tool.
- How hard that tool is to use (i.e., should a Subject Matter Expert be consulted).

For someone familiar with a specific tool, a 6in6 presentation can remind that person of the process.

Full disclosure: on the web site (but not in the collection of two slide presentations or in this book) there is a *third* slide in both the pptx and pdf version of the presentations. This slide has

more information on each of the two slides in the associated 6in6 presentation. They can be skipped on a first read of a 6in6 presentation.

All the 6in6 presentations are available, for free, at <https://www.sixsigmainsixminutes.com>. This free book is also available there.

Information about the 6in6 paradigm:

- **6in6 Vision** Encourage use of Six Sigma tools.
- **6in6 Mission** Distribute free basic Six Sigma tool information.
- **6in6 Goal** Illustrate Six Sigma tools using the “Six Sigma in Six Minutes” paradigm.
- **6in6 Success** If someone obtains a basic idea of what a specific Six Sigma tool does, from a 6in6 presentation, then we have success.
- **Why** To spread the joy of Six Sigma!

The following is information about the 6in6 concept and the 6in6 website:

- Where did the two slide 6in6 presentation concept originate?  
See Dan Zwillinger, Brian Foley, and Kurt Mittelstaedt, “Six Sigma Tools in Six Minutes,” *Six Sigma Forum Magazine*, Volume 15, Number 2, February 2016.
- Why was this website created?  
To give back to the Six Sigma community.
- Who created this website?  
Dan Zwillinger ([dan@SixSigmaInSixMinutes](mailto:dan@SixSigmaInSixMinutes)), a Six Sigma black belt (both ASQ and Raytheon certified).
- Is it safe to visit the 6in6 site (<https://www.sixsigmainsixminutes.com>)?  
Yes! The site does not use cookies, does not collect your data, and does not track visits.



# Which Six Sigma tool to use?

With so many Six Sigma tools, it can be challenging to determine which tools to use for a specific need. Some tools are appropriate for nearly any situation, such as Brainstorming. Below are other tools (listed alphabetically) which might be considered for different needs.

- **Starting a new business**

1. A3 report
2. Body Storming
3. Business diagnostic
4. CAIV
5. COCOMO
6. Customer Segmentation
7. Design Thinking
8. Future Back
9. PEST Analysis
10. PICK Chart
11. Project Charter
12. Starbursting

- **Improving customer service**

1. Customer Segmentation
2. Design Thinking
3. Survey
4. VCA
5. VSM
6. Voice of the Customer

- **Reducing manufacturing defects**

1. 5 Whys
2. 7 Wastes
3. Control Chart
4. Fishbone Diagram
5. Gage R&R
6. Hidden Factory
7. Mistake Proofing
8. Pareto Analysis

- **Increasing value from employees**

1. 6 Thinking Hats
2. Getting Things Done
3. Hoshin Planning
4. Multivoting
5. RASCI
6. SPACER
7. Stakeholder Analysis
8. Thumb Voting

- **Corporate governance**

1. 8D Problem Solving
2. Check Sheet
3. CPM
4. Design of Experiments
5. FMEA
6. Gap Analysis
7. Interrelationship Diagram
8. Kaizen
9. Kanban
10. KPI
11. Pareto Analysis
12. PEST Analysis
13. Process Capability
14. Process Decision Program Chart
15. Risk Assessment and Management
16. SIPOC
17. SPC
18. SWOT

- **Improving business performance**

1. 5S Process of Lean
2. 8D Problem Solving
3. 9 windows
4. AHP
5. Balanced Scorecard
6. Benchmarking
7. Business diagnostic
8. Competitive analysis
9. CCPM
10. Control Chart
11. Cost Benefit Analysis
12. Cost of Quality
13. Dashboard
14. DFMA
15. Design for Six Sigma
16. Fault Tree Analysis
17. Gage R&R
18. Gap Analysis
19. KPI
20. Pareto Analysis
21. PEST Analysis
22. Process Capability
23. Reverse Planning
24. SCAMPER
25. SPC
26. SWOT
27. SIPOC
28. Times: cycle, lead, takt
29. TRIZ
30. Theory of Constraints
31. VSM

# Acronyms

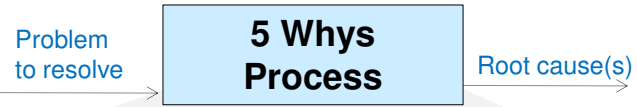
• 5S	5S Process of Lean	• IDEF	Integrated Definition Modeling
• 8D	8D Problem Solving	• IDP	Individual Development Plan
• A3	A3 report	• IPO	Inputs, Process, Outputs
• AHP	Analytical Hierarchy Process	• KPI	Key Performance Indicator
• AKA	Also Known As	• KSLOC	Thousand SW Lines Of Code
• AV	All Viewpoint	• LSL	Lower Specification Limit
• BSC	Balanced Scorecard	• MVP	Minimal Viable Product
• CAIV	Cost as An Independent Variable	• NGT	Nominal Group Technique / Multivoting
• CBA	Cost Benefit Analysis	• NPV	Net Present Value
• CCPM	Critical Chain Project Management	• OV	Operational Viewpoint
• CFD	Cumulative Flow Diagram	• PDCA	Plan-Do-Check-Act
• COCOMO	Constructive Cost Model	• PDPC	Process Decision Program Chart
• COGQ	Cost of Good Quality	• PEST	Political, Economic, Social, Technological
• COPQ	Cost of Poor Quality	• PICK	Possible, Implement, Challenge, Kill
• COQ	Cost of Quality	• QFD	Quality Functional Deployment
• CPM	Critical Parameter Management	• RASCI	Responsible, Accountable, Support, Consulted, Informed
• Cp & Cpk	Process Capability	• RCA	Root Cause Analysis
• CS	Customer Segmentation	• RPN	Risk Priority Number
• DFMA	Design for Manufacture and Assembly	• SCAMPER	Substitute, Combine, Adapt, Modify, Put to another use, Eliminate, Reverse
• DFSS	Design for Six Sigma	• SIPOC	Suppliers, Inputs, Process, Outputs, Customers
• DoDAF	Department of Defense Architecture Framework	• SME	Subject Matter Expert
• DOE	Design of Experiments	• SPACER	Safety, Purpose, Agenda, Conduct, Expectations, Roles & Responsibilities
• DOTWIMP	Defects, Overproduction, Transportation, Waiting, Inventory, Motion, (over) Processing	• SPC	Statistical Process Control
• DOWNTIME	Defects, Overproduction, Waiting, Non-Utilized Talent, Transportation, Excess Inventory, Motion, Extra Processing	• SV	Systems Viewpoint
• DVP&R	Design Verification Plan and Report	• SWOT	Strengths, Weaknesses, Opportunities, Threats
• EA	Enterprise Architecture	• TOC	Theory of Constraints
• FFA	Force Field Analysis	• TOGAF	The Open Group Architecture Framework
• FMEA	Failure Modes and Effects Analysis	• TRIZ	Theory of Inventive Problem Solving
• FTA	Fault Tree Analysis	• UCL	Upper Control Line
• GRR	Gauge R&R	• USL	Upper Specification Limit
• GTD	Getting Things Done	• VCA	Value Chain Analysis
• Gage R&R	Gage Repeatability & Reproducibility	• VOC	Voice of the Customer
		• VSM	Value Stream Map
		• WIP	Work In Progress

# 5 Whys (Root Cause Analysis)

**Problem**  
How to find a problem's root cause?

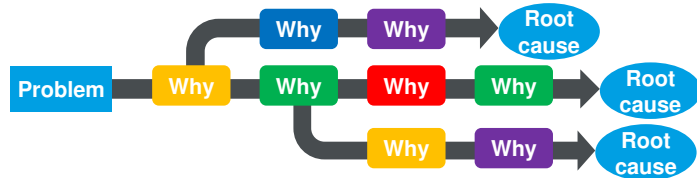
**Difficulty**  
Easy to use

- The "5 Whys" method is a simple & fast way to determine the root cause(s) of a problem.
- The question "Why?" is repeatedly asked, starting at the problem statement. The process stops when the results are not actionable; this often occurs after 5 "Why?" steps.



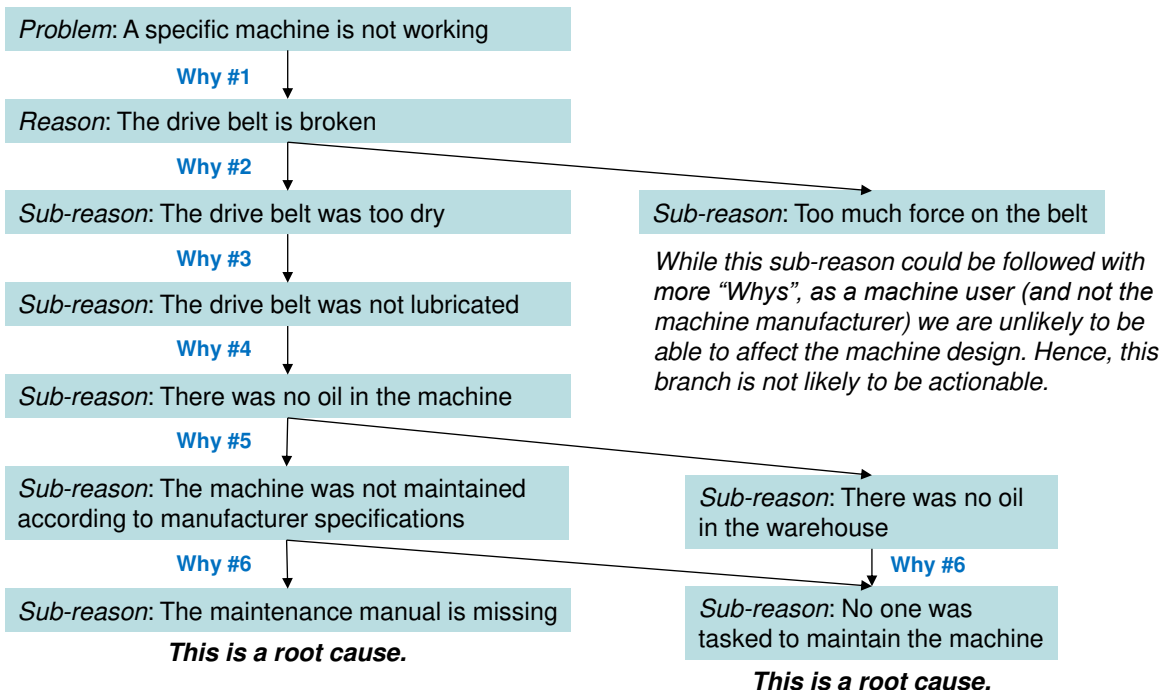
1. Ensure the problem is clearly articulated.
2. Ask "Why did the problem occur?" There may be several reasons.
3. For each of the reasons, ask "Why?"; each may have several reasons.
4. Continue asking "Why?" until the reasons are no longer actionable.
5. The lowest level reasons that are actionable are the *root causes*. If these are addressed then the problem should be resolved (or mitigated).

Problem	Reason(s)
Why #1: Why did that problem occur?	←
Why #2: What did THAT occur?	←
Why #3: What did THAT occur?	←
Why #4: What did THAT occur?	←
Why #5: What did THAT occur?	←
Potential Root Cause(s)	←



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## 5 Whys – Example – Broken machine



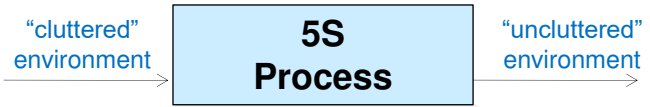
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# 5S Process of Lean

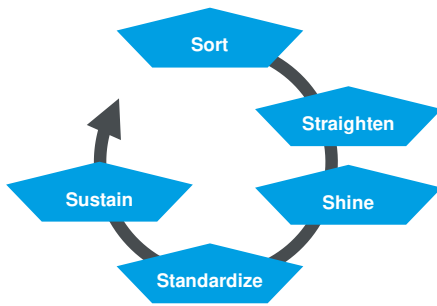
**Problem**  
How to remove  
distracting clutter?

**Difficulty**  
Easy to  
use

- **5S** is a organization method.
- 5S is based on 5 Japanese words whose transliterations start with the letter "S." These correspond to 5 English words: Sort, Straighten, Shine, Standardize, and Sustain.
- 5S efforts impress customers.
- 5S improves workplace safety, quality, morale, and throughput.



- Continuously perform the following actions
1. **Sort:** Remove unneeded items from the area.
  2. **Straighten:** Make a place for everything and put everything in its place.
  3. **Shine:** Clean and inspect everything in the area.
  4. **Standardize:** Every process has a standard.
  5. **Sustain:** Continue 5S – without being told.



Japanese	English	Meaning
<i>Seiri</i>	Sort	Organize
<i>Seiton</i>	Straighten	Order
<i>Seiso</i>	Shine	Clean
<i>Seiketsu</i>	Standardize	Standards
<i>Shitsuke</i>	Sustain	Discipline

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## 5S - Examples

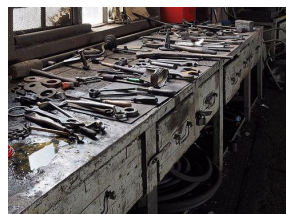
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### Popular 5S application areas

1. **Office environments:** especially desks and storage
2. **Manufacturing:** especially kitting of tools and components



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# Six Thinking Hats

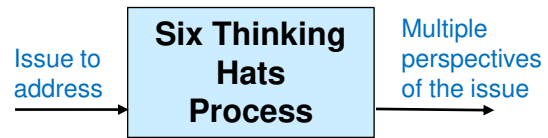
## Problem

How to obtain multiple perspectives of an issue?

## Difficulty

Work with an SME

- **Six Thinking Hats** has 6 differently colored hats, each representing a specific thought process (see below).
- When the team “puts on a hat,” they address an issue from that hat’s point of view. Sessions begin with a “blue hat,” to discuss the meeting and hat order.
- Sequentially, the team puts on different hats, each for a fixed period.
- The facilitator always wears a blue hat.



1. Select an issue (e.g., project or concept)
2. The facilitator, with the team, selects a hat ordering:
  - **Any meeting:** Blue, White, Green, Yellow, Red, Black
  - **Brainstorming meeting:** Blue, White, Green, Blue
  - **Problem solving meeting:** Blue, White, Green, Red, Yellow, Black, Green, Blue
  - **Strategic planning meeting:** Blue, Yellow, Black, White, Blue, Green, Blue
3. The facilitator sequences through the hats, leads the discussion for each hat, and decides when to move to the next hat.

	Black	risk assessment
	Blue	organization and planning
	Green	creative thinking
	Red	feelings and instincts
	White	information gathering
	Yellow	benefits and values

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## Six Thinking Hats – Example

### Sample initial questions for a facilitator to ask for different hats

- **Black Hat:** What risks need to be considered?
- **Blue Hat:** What support, systems, or processes will be needed?
- **Green Hat:** How can we create new ideas?
- **Red Hat:** What are your initial reactions?
- **White Hat:** What information do we have?
- **Yellow Hat:** Why should we be optimistic?

### Sample follow-on questions for the Black Hat:

1. How will this fail?
2. What are the weaknesses or risks?
3. What are potential unintended consequences?
4. How will the competition react?
5. Which stakeholders can prevent success?

### Sample follow-on questions for the Green Hat:

1. How can we generate multiple problem solutions?
2. What brainstorming tools can we use to find solutions?
3. What relevant outrageous scenarios can we create?
4. How would <famous person> solve this problem?
5. What thought experiment could we perform?

### Sample follow-on questions for the Yellow Hat:

1. What does success look like?
2. What makes this so successful?
3. What are the short term and long term benefits?
4. How does this make things better?
5. If we could not fail, what would we do?

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# 7 Wastes

## Problem

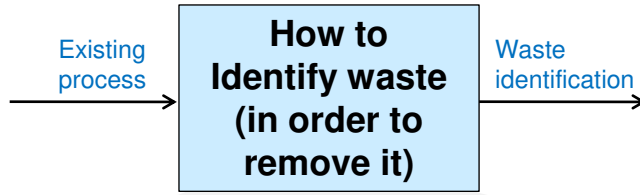
How to determine what types of waste are present?

## Difficulty

Easy to use

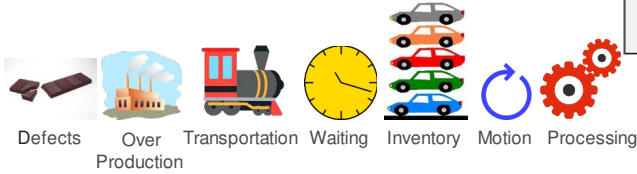
A **value-added task** meets 3 criteria:

1. The customer cares
  2. Something changes
  3. The task is done right the first time
- Everything else is **waste**.  
There are **7 classic types of waste**.  
(Non-utilized talent is a new 8th waste.)



1. **Defects** – Products (or services) that must be corrected
2. **Over Production** – Producing too much of a product.
3. **Transportation** – Moving items unnecessarily
4. **Waiting** – Waiting for the previous step to complete.
5. **Inventory** – Inventory or information not being used
6. **Motion** – Motion not required for process
7. **Processing** – Activities not required for process
8. **Non-Utilized Talent** – Employees not effectively used

1. Review process looking for the 7 types of waste (use acronym **DOTWIMP**)
  1. **Defects** (Rejects, Repair, Rework)
  2. **Over Production**
  3. **Transportation**
  4. **Waiting**
  5. **Inventory**
  6. **Motion**
  7. **Processing** (Excess or Unnecessary)
2. Once waste is identified, try to remove it



### FIGURES

- [https://commons.wikimedia.org/wiki/File:Cooking\\_chocolate,\\_broken\\_bar.jpg](https://commons.wikimedia.org/wiki/File:Cooking_chocolate,_broken_bar.jpg)
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# 7 Wastes – Examples – Two Different Environments

	Manufacturing environment	Office environment
<b>Defects (Rejects, Repair, Rework)</b>	Over producing to allow for expected defects.	Order entry errors. Lost files or records. Adding extra checks or inspection steps into a process.
<b>Over Production</b>	Using more expensive high capacity equipment when low capacity equipment is good enough	Producing reports that no one reads or needs. Duplicating data in multiple places. Creating extra copies. Sending information using multiple medium (e.g., email, post, fax).
<b>Transportation</b>	Reorganizing warehouses. Moving products in and out of storage.	Unnecessary movement of paperwork or information.
<b>Waiting</b>	Waiting for late deliveries to arrive to stock a warehouse.	Waiting for approvals or signatures. Attendees late to meetings. Using slow computers and IT systems.
<b>Inventory</b>	Having stock damaged from it being stored for so long.	Excessive office supplies.
<b>Motion</b>	Switching tasks excessively, resulting in moving between locations.	Searching for files on computer. Re-entering data. Poorly designed work stations resulting in more bending and reaching.
<b>Processing (Excess or Unnecessary)</b>	Including too many layers of packaging.	Obtaining unnecessary approvals on an activity or output.

When including non-utilized talent, use the acronym "**DOWNTIME**"

- |                           |                        |
|---------------------------|------------------------|
| • D = Defects             | • T = Transportation   |
| • O = Overproduction      | • I = Excess Inventory |
| • W = Waiting             | • M = Motion           |
| • N = Non-Utilized Talent | • E = Extra Processing |

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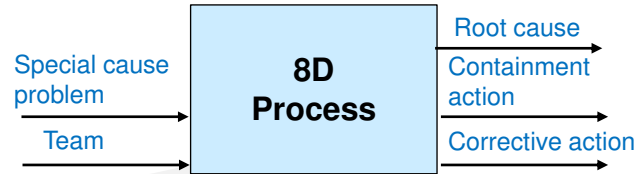
# The Eight Disciplines of Problem Solving (8D)

**Problem**  
How to solve a special cause problem?

**Difficulty**

Work with an SME

- The **8 Disciplines**, also known as the **8D process**, is a team-oriented approach to correct recurring problems.
- 8D has more complexity than the PDCA (plan-do-check-act) approach and less complexity than six sigma's DMAIC.



- Select the problem to be addressed
- Execute the classic 8D steps (with D0 added):
  - D0: Prepare and plan for 8D.
  - D1: Select a knowledgeable team.
  - D2: Quantify the problem: who, what, where, when, why, how, and how many.
  - D3: Develop and implement a containment plan to isolate the customer from the problem.
  - D4: Determine the problem root cause(s).
  - D5: Identify the corrective actions and test.
  - D6: Implement the corrective actions.
  - D7: Take preventive measures to prevent recurrence of this and similar problems.
  - D8: Congratulate the team.

PDCA	8D
	Step D0
Plan	Step D1
	Step D2
Do	Step D3
	Step D4
	Step D5
Check	Step D6
	Step D7
Act	Step D8

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## 8D – Example – Illustrative “8D Report”

### Example: 8D Customer Complaint Resolution Report

Customer Complaint Resolution Report			
Report Title: Healthy Community Coalition (HCC) Meeting Improvement			Report # 1
Dates: 3/15/17-8/15/17	Customer Complaint: 3/15/17	Report Initiated: 3/22/17	Report Completed: 8/15/17
Customer: Jane Doe, HCC Member	Program/Division: Health Promotion		
<b>1D – Team Members</b>			
Role	Name	Email Contact	
Leader	Jane Eyre	jeyre@examplehd.com	
SME	Atticus Finch	atfinch@examplehd.com	
Champion/Sponsor	Kinsey Millhone	kmillhone@examplehd.com	
<b>2D – Problem Description</b>			
HCC is responsible for convening partners to make progress on the CHIP and for increasing community engagement and mobilization. Kinsey received an email from a key partner (a hospital community benefit director) about the last three HCC meetings. The complaint was a long, detailed list of frustrations about the ineffectiveness of the meetings, which included lack of meeting minutes and timely agendas. Further, the programming for meetings seemed last minute – and mostly committee updates instead of meaningful presentations, shared learning and connecting. The complaint also included frustration that this coalition feels more like a coffee klatch (social chitchat), rather than an effective way to make progress on serious community health concerns.			
<b>3D – Interim Containment Actions (who, takes what action, by when)</b>			
<ol style="list-style-type: none"> <li>Kinsey immediately replied to the partner stating that she appreciated the feedback and will begin looking into what can be done.</li> <li>Kinsey initiated the 8D process to explore the process improvement options.</li> <li>Kinsey will provide a more detailed update on the problem-solving process update to the partner prior to the next HCC meeting.</li> <li>Jane will cancel the April HCC meeting to assure adequate time to initiate an improvement process.</li> </ol>			
<b>4D – Root Cause Analysis</b>			
<b>Cause &amp; Effect Diagram</b>		<b>Five Why Analysis</b>	
		<ol style="list-style-type: none"> <li>Key partner is reporting ineffective meetings</li> <li>Poor planning &amp; execution</li> <li>New, poorly trained staff</li> <li>Gaps in training &amp; oversight</li> <li>No process</li> </ol>	

5D – Design Corrective Action (generate solutions to address root causes)			
What needs to be done?	Who must be involved?	By when?	How will success be measured?
1. Effective meeting training for staff	Kinsey, Jane	April 15	Pre-Post Assessment
2. Develop a coalition program design team	Jane and 2-4 community partners, including complainant	May 1	Agenda, participation, minutes, attendance at meetings
3. Coalition assessment	Atticus	June 15	Assessment report shared with coalition, July meeting
4. Coaching/mentoring for Jane	Jane, coalition/QI consultant	Every 2 weeks for 2 months	Kinsey consultation with key partners in late July
<b>6D – Implement and Validate Corrective Action</b>			
Solutions Implemented:	Results:		
Contracted for effective meeting training & facilitation skills	All staff leading and participating in community coalitions now have shared expectations about agendas, design teams, minutes, planning/execution/follow-up		
Identified an internal coalition coach for Jane	Jane has increased support, understands the expectations of external clients, and now exceeds expectations.		
Coalition Assessment developed, administered & Analyzed	Discovered new opportunities to improve and learned that most partners are very happy with their level of engagement.		
Jane, with help from Kinsey, created an HCC Design Team.	More partners are sharing the work and feeling ownership in the effectiveness of the meetings. Jane is building deeper relationships with community partners. Attendance has increased. Agendas and minutes are available for all meetings on the coalition website.		
Customer Notification	Assigned to:	Key Messages	Completion Date:
Customer was included in coalition program design team	Jane	Customer participation is key to process improvement	8/1/17
<b>7D – Preventive Action (policy/procedure change, training protocol, etc.)</b>			
Action Taken	Responsible Person	Completion Date:	
Added a training plan to the agency workforce development plan for both 1) effective meetings and 2) meeting facilitation (with criteria for selecting staff who must complete at least every two years)	Kinsey	8/15/2017	
Adopted a policy, procedure, and schedule for coalition assessment (for customer satisfaction data collection) method for all agency supported coalitions.	Atticus	8/15/2017	
<b>8D – Team and Individual Recognition</b>			
Jane, Kinsey, and Atticus completed a QI storyboard documenting the intervention, which will be posted in the agency for the month September. A feature story was shared in the department newsletter focusing on the lessons learned from improved community relationships.			

From [http://www.phf.org/resourcestools/Documents/8D\\_Customer\\_Complaint\\_Resolution\\_Report.pdf](http://www.phf.org/resourcestools/Documents/8D_Customer_Complaint_Resolution_Report.pdf) (with permission)

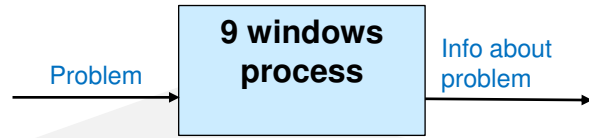
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# 9 windows

**Problem**  
How to improve a product or process?

**Difficulty**  
Work with an SME

1. **9 Windows** considers innovation via 9 “windows” of time and space:
  - A. **“Time”** = when the problem could have been solved: **past, present, or future.**
  - B. **“Space”** = where the problem is solved: **super-system, system, or subsystem.**
    - Sub-system = component of the system
    - Super-system = external environment the system interacts with
2. A 9 windows grid is below.



1. Select a specific problem (the “system”).
2. Create the 9 windows grid
3. Fill in the grid:
  - A. Put the problem in the center.
  - B. Document the key element(s) of the
    - super- and sub-systems
    - past and future
  - C. Then, fill in the remaining 4 corners of the grid (shown yellow in image below left)
4. From the information in the grid assess the innovation opportunities, essentially whether to focus on time attributes or system attributes.

		Time		
		Past	Present	Future
Space	Super-system			
	System		<i>problem</i>	
	Sub-system			

9 windows grid

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## 9 windows – Example – COVID restrictions

**Problem:** Covid limits face-to-face (F2F) activities for school children.

		Time		
		Past	Present	Future
Space	Super-system	School districts distribute general guidelines which schools adapt as needed	School districts distribute educational material for Covid's "new normal"	Nationwide, best practices are determined, materials are developed and distributed
	System	School children meet F2F all day at school	<i>Covid limits face-to-face (F2F) activities for school children</i>	3D and immersive environments are used in schools
	Sub-system	School children learn social skills while eating lunch.	Students sit 6 feet apart, which limits social interaction	Students engage in fun activities ("games") during lunchtime that support growth of social skills.

Eating lunch at school is a part (a specific sub-system) of the school experience.

These are things that could exist in the future..

**Conclusion:** At the local level, it may be that focusing on the “time” aspect is more useful in the short term. The “space” aspect, would be beneficial, but may be take longer.

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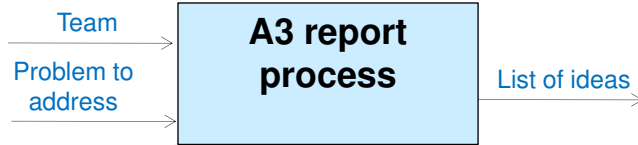
# A3 report

**Problem**  
How to document a project?

**Difficulty**

Easy to use

- An **A3 report** summarizes important information about an improvement project.
- There is no standard content for an A3 report, although it is typically aligned with PDCA (Plan-Do-Check-Act).
- The A3 report fits on a single page, on paper of size A3.
- A3 reports can be used during project performance, or at project completion.



1. Obtain template for your company's A3 report, or use one from the web. (It likely has ~7 categories such as the ones shown below left.)
2. For each category, show the important information using text and/or graphics.
3. Prominently display the A3 report for team and management review, and for educational purposes.

A3 steps	PDCA steps
1 Background	Plan
2 Problem Statement	
3 Goal Statement	
4 Root Cause Analysis	
5 Countermeasures	Do
6 Effect Confirmation	Check
7 Follow Up Actions	Act

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# A3 report – Examples from the web

Each company has its own A3 formatting style

**Prepared By:** Jess Fixit | **Invoice Creation Lead Time Improvement - A3 Report** | **January 28, 2018**

**Background:** The time between product delivery and invoicing our customers averages 14.09 days. Our customers pay their invoices on time (~30days) 99.95% of the time on average. \$22.3 million in invoices in process.

**Current Situation:** A process flow diagram showing steps: Log in (0.5 days), Match to PO (2.0 days), Prepare Invoice (2.0 days), Approve Invoice (2.0 days), and Send Invoice (0.5 days). Total lead time is 14.09 days. Cycle time is 6.00 days, queue time is 7.5 days.

**Analysis:** Includes a bar chart titled 'Items Staying in the Invoicing Process' and a line chart titled 'X-Chart - Invoice' showing lead time trends.

**Goal:** A target process flow diagram with a goal of 1.5 days lead time, 1.00 day cycle time, and 1.00 day queue time.

**Recommendations:**

- Eliminate external approval, invoice preparer
- Eliminate logging delivery acknowledgement
- Eliminate generating invoices on user authority
- Use electronic delivery acknowledgement which returns our original information, thereby eliminating the need for re-entry of information and minimizing the need for P.O. matching and reconciliation
- Use electronic (EDI) transmittal of invoice to eliminate FAX problems

**Implementation Plan:**

#	Description	1	2	3	Owner	Completion %
1	Process design				MK	100%
2	Simulation				DH	100%
3	Capital approval				GF	100%
4	Customer input				GF	100%
5	Set up EDI				MK	80%
6	Pilot Runs				TJ	50%
7	Launch					

**Follow Up:** Include section in next 6 customer surveys to review back-up procedures with IS to ensure

**Results Report:** Includes a bar chart titled 'Items Staying in the Invoicing Process' and a line chart titled 'X-Chart - Invoice'.

Some web examples

**Title:** Reduce lunch cycle time for salads and sandwich preparation

**Owner/Date:** Sabrina Botton Manager/ 2/20/18

**Background:** Background is to reduce lunch preparation in the Salads, Salads, Breads lunch pattern and lunch and sandwiches.

**Current State:** Current state is lunch preparation with cycle time of 10 minutes.

**Goal and Targets:** Reduce the cycle time of lunch and sandwiches.

**Implementation Plan:**

Timeline	Planned	Actual
Mar 2018	Change process	
Mar 2018	Team education	
Mar 2018	Launch new process	

**Follow-Up:** Follow up with check for the existing April 2018

**Title:** Capital Equipment

**Owner/Date:** [Not clearly visible]

**Background:** [Not clearly visible]

**Current State:** [Not clearly visible]

**Goal and Targets:** [Not clearly visible]

**Implementation Plan:** [Not clearly visible]

**Follow-Up:** [Not clearly visible]

**Results Report:** [Not clearly visible]

**Title:** Standardized Creation Lead Time Improvement - A3 Report

**Owner/Date:** [Not clearly visible]

**Background:** [Not clearly visible]

**Current State:** [Not clearly visible]

**Goal and Targets:** [Not clearly visible]

**Implementation Plan:** [Not clearly visible]

**Follow-Up:** [Not clearly visible]

**Results Report:** [Not clearly visible]

**Title:** [Not clearly visible]

**Owner/Date:** [Not clearly visible]

**Background:** [Not clearly visible]

**Current State:** [Not clearly visible]

**Goal and Targets:** [Not clearly visible]

**Implementation Plan:** [Not clearly visible]

**Follow-Up:** [Not clearly visible]

**Results Report:** [Not clearly visible]

- Figure credits
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  - <https://www.leansixsigmadefinition.com/glossary/a3/>
  - <https://goleansixsigma.com/john-shook-grand-daddy/>
  - <https://goleansixsigma.com/4-new-ways-to-use-a3s-have-you-tried-any-of-these/>
  - <https://www.isixsigma.com/operations/manufacturing-operations/improved-rescue-time-from-a-bolling-mill-machine/attachment/a3-project-summary/>

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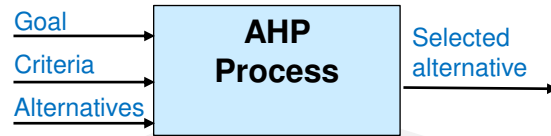
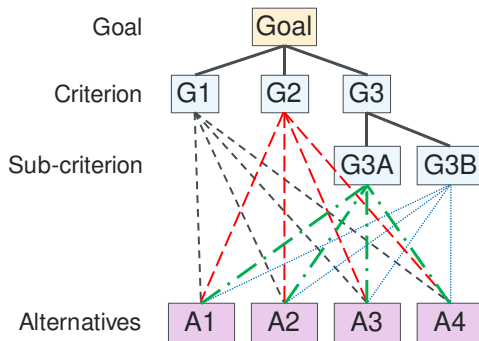
# Analytical Hierarchy Process (AHP)

**Problem**  
How to choose among multiple alternatives?

**Difficulty**

Work with an SME

- The **Analytic Hierarchy Process (AHP)** is a method for making decisions under multiple and complex criteria.
- AHP is easy to use since stakeholders only need to perform pairwise comparisons, assigning values 1-9.
- The pairwise comparisons are performed between all the criteria, between each set of sub-criteria, and between all the alternatives.



1. Define the goal.
2. Define the criteria (simple or hierarchical)
3. Define the alternatives.
4. Determine the weights amongst the criteria, sub-criteria, and alternatives (for each criteria) using pairwise comparison.
5. Use SW to convert pairwise comparisons into weights and confirm consistency.
6. Use SW to combine priorities and obtain overall weights for the alternatives.

Pairwise Comparison Scale	
Intensity	Definition
1	Equal Importance
3	Moderate Importance
5	Strong importance
7	Very strong importance
9	Extreme importance

Sample scale with corresponding text

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## AHP – Example – Selecting a Leader

- Choosing a leader from among 3 candidates.
- Use 3 criteria: experience, education, and teaching ability.

(1) Compare the selection criteria pairwise to determine their priorities. (If "A" is preferred over "B" by a factor of N, then "B" is preferred over "A" by a factor of 1/N)

Obtain matrix of pairwise results → these are AHP inputs

Criteria	Experience	Education	Teaching	Weights
Experience	1	5	9	0.751
Education	1/5	1	7	0.178
Teaching	1/9	1/7	1	0.070

inconsistency 1.5%

From the 3-by-3 matrix, AHP finds the weights (0.75, 0.18, 0.07); which sum to 1.

The value "1/9" means the stakeholders think "Teaching is 1/9<sup>th</sup> as important as Experience" which is the same as "Experience is 9 times more important than Teaching."

(2) For each of the 3 criteria compare the candidates pairwise, to create a 3-by-3 matrix. Then, AHP determines the weights (blue boxes) for each criteria.

Experience	Alex	Beth	Chris	Weights
Alex	1	3	1/5	0.188
Beth	1/3	1	1/7	0.081
Chris	5	7	1	0.731

inconsistency 3.2%

Education	Alex	Beth	Chris	Weights
Alex	1	1/5	5	0.207
Beth	5	1	9	0.735
Chris	1/5	1/9	1	0.058

inconsistency 5.9%

(3) Weight the alternative priorities, for each of the criteria, by that criteria's AHP weights. (See the red computation.)

Candidate	Experience	Education	Teaching	Row sum
Alex	0.141	0.037	0.019	0.197
Beth	0.061	0.131	0.047	0.239
Chris	0.549	0.010	0.004	0.563

Largest row sum value: Chris is the best choice

0.061 = 0.751 \* 0.081  
0.549 = 0.751 \* 0.731  
(for values, see red boxes in steps (1) and (2))

Teaching	Alex	Beth	Chris	Weights
Alex	1	1/3	5	0.265
Beth	3	1	9	0.672
Chris	1/5	1/9	1	0.063

inconsistency 1.5%

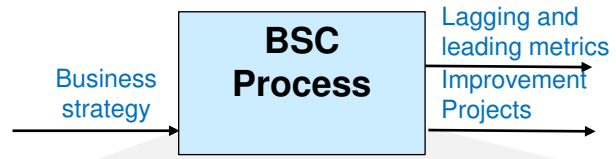
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# Balanced Scorecard (BSC)

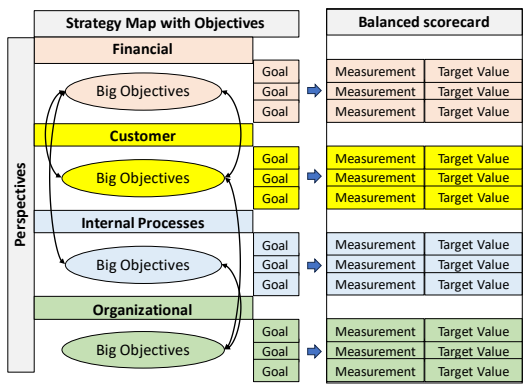
**Problem**  
How to manage an organization's strategy?

**Difficulty**  
Work with an SME

- The **Balanced Scorecard** (BSC) is a framework for tracking and managing an organization's strategy.
- A BSC has four connected perspectives.
  - Financial** goals: What do shareholders want?
  - Customer** goals: What do customers want?
  - Process** goals: What should we be better at?
  - People** (or learning and growth, or innovations, or organizational capacity) goals: How can we create more value?
- A **strategy map** is a 1 page depiction of a BSC with connections between the perspectives.

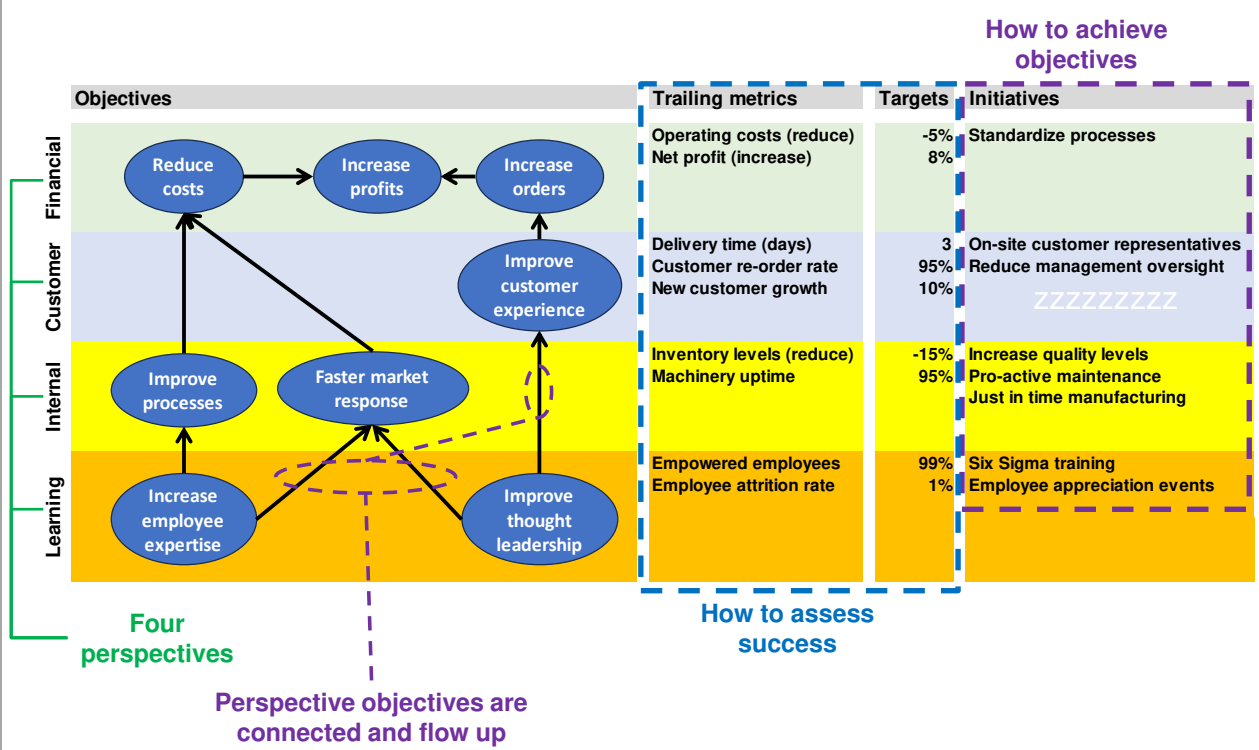


1. Define the **Mission, Vision, and Values**.
2. Define **Strategic Priorities**, the top-level goals (e.g., client relations, operations, product)
3. Define the ordered **Four Perspectives**: Finance, Customer, Process, and People.
4. Define the **Business Goals** supporting the perspectives. Create cause and effect relations; the lower perspectives' goals explain how to achieve the higher perspective goals.
5. Describe each goal's **Rationale**, for later review.
6. Define **Leading** (success goals) and **Lagging** (achieved results) **metrics** for each goal.
  - Only leading metrics can be influenced; it can be challenging to identify them.
7. Define **initiatives** to execute the strategy.
8. Flow the information down with local strategy maps aligned with higher level strategy maps.



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## BSC – Example – Generic



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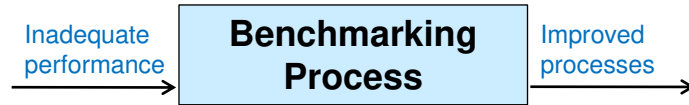
# Benchmarking

**Problem**  
How to achieve world class performance?

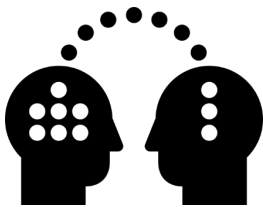
**Difficulty**

Work with an SME

- **Benchmarking** compares one of your **processes, services, or products**, to a standard; typically the best in class.
- It may, or may not, focus on your competitors.
- Examples: Amazon has free returns. Disney answers the phone on the first ring. Lands' End has a lifetime guarantee.



1. Document current practices, identify problem areas and their key performance indicators (KPIs).
2. Identify industries having similar processes. (Examples: For SW & HW with few defects consider US defense contractors or NASA. For fast SW creation consider the SW startup community.)
3. Identify the leaders in these industries.
4. Determine the processes of these leaders: visit, capture data, score them using your KPIs.
5. Model the leader's processes so they can be applied to your organization.
6. Implement necessary improvement projects.
7. Repeat as needed.



Knowledge and capability transfer from the best in class

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## Benchmarking – Example – 6in6 paradigm

Assume 6in6 activities (e.g., selecting topics, creating presentations) need to be improved. Below are some sample needs, the element to improve, an appropriate KPI that can be used across industries, an industry to investigate, and a possible exemplar.

Need	KPI (Key Performance Indicator)	Element to improve	Industry with this skill	Potential exemplar
Selecting content for 6in6 site	Percentage of visitors finding the content "very relevant for me"	Selecting useful content, especially for business concepts	Business schools	Wharton Business School
Creating synopsis for each 6in6 topic	Percentage of site users finding the content to be "very helpful to me"	Creating synopses, especially for business concepts	Publishers	Harvard University Press
Creating useful graphics to accompany 6in6 descriptions	Percentage of site users finding the content to be "very useful to me"	Creating compelling graphics	News media (graphics accompanying news stories)	USA Today
Creating awareness of 6in6 web site and updates	Number of new visitors to website per week	Who makes sticky sites?	Groups managing start-ups	Y Combinator
Formatting for all the 6in6 presentation	Percentage of site users finding the presentation to be "well executed"	Design good story formats	News media	USA Today
Responsiveness to 6in6 inquiries	Percentage of site users finding the responsiveness "very quick"	Timely, complete responses	Vacation travel destinations	Disney Parks

How do this well?

How does this industry do it?

Assess how this company does it?

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# Body Storming

## Problem

How to improve thinking about a product or process?

## Difficulty

Some training required

- **Body storming**, a form of brainstorming, creates user empathy and leads to re-design.
- A **body storming** exercise combines role-play and simulation. It uses prototypes and observations of how users interact with products to understand the user experience.
- There is no standard body storming process, the process is tailored to each specific circumstance.

Early thinking about a product or process

**Body Storming Process**

Improved thinking based on user experiences

1. Define the issue/product/process to be examined.
2. View the issue location and observe:
  - A. How people behave at this location.
  - B. The artifacts people interact with.
3. Define a scenario to be explored.
4. Assemble an appropriate team.
5. Run the body storming exercise:
  - A. Follow the defined scenario
  - B. Capture relevant info (e.g., people's behavior)
  - C. Optional: Replay scenario using info gained.
6. Gather the participants' subjective experiences
7. Analyze the results and take appropriate actions.



Abstract brainstorming



Hands on Brainstorming

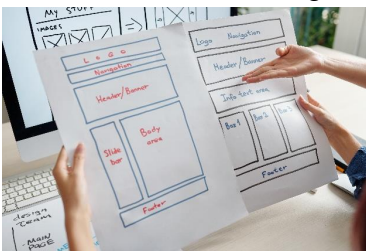
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## Body Storming – Example – User Interfaces

Paper prototyping is a form of body storming. For user interfaces, paper prototyping is a way to develop ideas and design user flows using hand-created images. Paper prototypes evaluate the user experience more than the design itself.

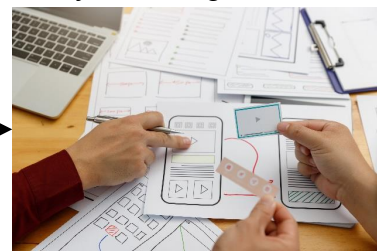
### Initial interface design



### Paper instantiation



### Body storming exercise



Revise interface design

Users "push" icons and the facilitator appropriately changes the paper model.

### User interface evaluation process

- Observe 3-5 different people attempting to use the interface.
- The facilitator changes the paper model in response to user activities.
- Update the design, as needed, to align the design with user expectations

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# Brainstorming

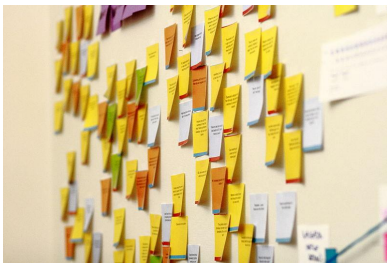
## Problem

How to identify ideas to solve a problem?

## Difficulty

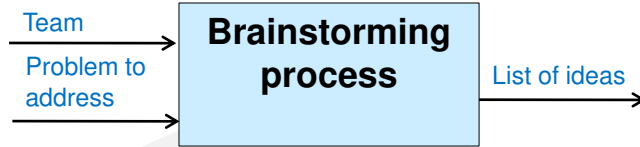
Easy to use

- **Brainstorming** is a way to generate many ideas or solutions to a problem or issue.
- Brainstorming rules:
  - There are no bad ideas.
  - Don't discuss any ideas.
  - Don't criticize any ideas.
  - Encourage people to build on other people's ideas.
  - Encourage quantity over quality.



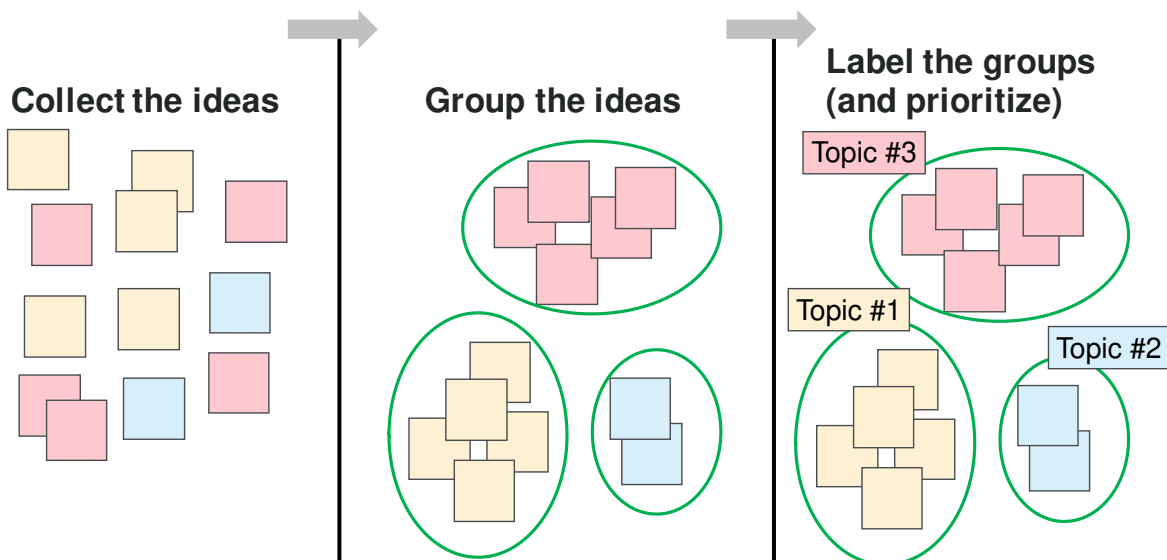
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1. Define the problem or issue to be addressed. It may be a “why,” “how,” or “what” issue.
2. Perform the brainstorming – multiple options:
  - A. People write their ideas on sticky notes.
  - B. For *unstructured brainstorming*, have people call out ideas, and the leader writes them on sticky notes.
  - C. For *round-robin brainstorming*, ask each person in turn for an idea (they can pass)
3. Capture all ideas in an area visible to all.
4. Stop when no one has any more ideas.
5. Put the ideas into groups and eliminate duplicates (this can also be done during the session)

## Brainstorming – Example – Generic



- The grouping can be done during, or after, the brainstorming session.
- The prioritization is done after the brainstorming session.

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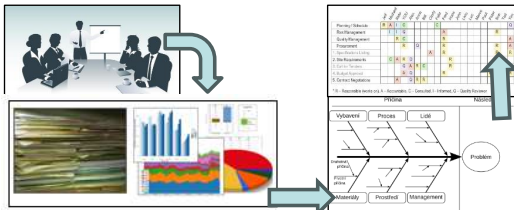
# Business Diagnostic

**Problem**  
How to improve a product or process?

**Difficulty**  
Work with an SME

- A **Business Diagnosis** (BD) evaluates a business's current state and identifies the factors causing that state.
- A BD is a methodical process.
- A BD results in actions to improve the current state.
- There are 4 types of analysis (see table below). A BD is one.

<b>A</b> What happened?	Descriptive Analytics
<b>B</b> Why did it happen?	Diagnostic Analytics <i>(Business Diagnostic)</i>
<b>C</b> What may happen?	Predictive Analytics
<b>D</b> What to do?	Prescriptive Analytics



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- BD sponsor
- Business issue

## Performing a Business Diagnostic

- Current state causes
- Action plan

- 1. Where? Define Focus Area:** Articulate a specific business concern (e.g., related to employees, finances, marketing, operations). Prioritize and bound the effort (e.g., "XX is out of scope").
- 2. What? Collect and Analyze Data:** Obtain relevant quantitative and qualitative data (e.g., customer feedback, expert opinions, orders, sales, profits). Analyze with statistical and other tools. Identify trends. Compare to competitors and standards.
- 3. Why? Root Cause Analysis:** Use data to identify the causes impacting the top priorities.
- 4. Actions? Develop Plan:** Define metrics to assess identified causes. Define goals and create tasks. Track progress over time using metrics.

## BD – Example – Subscription Service

Imagine you are running a subscription service (e.g., delivering information, entertainment, or monthly product packs) and revenue is down. Why?

### 1 Issue: Why is customer revenue declining?

Constrain the investigation as follows:

- Look back 3 years (when new format started)
- Look at domestic customers (address international later)

### 3 Root Cause Analysis

1. Active subscription termination: mostly younger subscribers desiring more age-appropriate content
2. Passive subscription termination:
  - Many not informed subscribing was ending
  - To renew after termination, subscribers need to fully re-enroll – a lengthy process

### 2A Collect data (as a function of time)

- Demographics: number & type of customers
- Revenue per customer
- Subscriber content usage
- Subscription termination: active vs passive
- Subscription termination: by number of years of subscription
- Exit surveys of those who stopped subscribing
- Comparable values from competitors.

### 2B Analyze data

- Segment market (based on data), statistically summarize, identify correlations, ...

### 4 Plan

#### 4A Metrics

- Percent of subscribers renewing
- Time taken on web site to renew subscription
- Amount of content by age group
- Subscriber content usage for younger subscribers

#### 4B Goals & Tasks

- Within 6 months:
  - Percent of subscribing renewing increased by 20%
  - Younger subscribers increase content usage by 10%
- Subscribers sent email at least one month before subscription expires.
- Can reach renewal site from email
- Can resubscribe in less than 1 minute

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# Check Sheet

## Problem

How to capture data for analysis?

## Difficulty

Easy to use

1. A **Check Sheet** is the simplest quality tool.
2. A check sheet is an organized way to capture information.
3. The information captured can be quantitative or qualitative. When quantitative, a check sheet is called a *tally sheet*.
4. Each type of check sheet has a different purpose, such as:
  - A. Counting number of defects
  - B. Determining defect locations
  - C. Determining how defective something is.

- Existing process
- Team

## Check Sheet Process

- Check Sheet
- Data for analysis

1. Define the data needed to address a specific issue.
2. Choose an appropriate check sheet style, such as
  - A. Obtaining the distribution of a specific item
  - B. Counting the number of defective items
  - C. Identifying where defects occur
3. Create the check sheet.
4. Train the team on how to use the check sheet.
  - Test the team and the check sheet to ensure the data captured is correct and useful.
5. Determine how, when, and where to collect data.
6. Collect the data.

Problem	Mon	Tue	Wed	Thu	Fri
Timeliness	I		III		
Quality		II	III		II
Quantity	I			I	
...					

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# Check Sheet – Several Examples

## Obtaining the distribution of an item

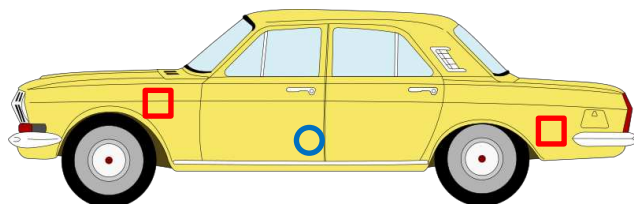
Date	6/1/2023	
Product	widget #1	
Inspector	Bob	
Batch	A23	
Specified weight (grams)	Measured difference	Observations
139	< -5	x x x x x x
	(-3, -5]	x x x x x x x x x
	[-0.1, -3]	x x x x x x x x x x x
	0	x x x x x x x x x x x
	[0.1, 3]	x x x x x x
	(3, 5]	x x x x
	> 5	x x x

## Counting defective items

Date	6/1/2023						
Product	widget #2						
Batch	B34						
Shift	Machine	Operator	Defects observed				
			Monday	Tuesday	Wednesday	Thursday	Friday
1	A	Alan			III		II
		Betty		II			II
	B	Carol	III				
		Dan			I		I
2	A	Eric	I		II		III
		Frank		II			
	B	George			I		I
Harry		II			II		

## Defect location

Date	6/1/2023	
Inspector	Charles	
Vehicle	stock #8347	
Icon	Defect type	Count
□	dent	II
○	scratched paint	I



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# Competitive Analysis (CA)

**Problem**  
How do you compare to the competition?

**Difficulty**

Work with an SME

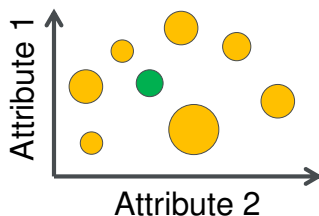
1. A **Competitive analysis** compares your competitors against your brand to identify differentiators, strengths, and weaknesses.
2. A **CA** identifies market opportunities and customer preferences, and supports market positioning, pricing strategies, and differentiation.

- Vision / goals
- Information resources

## Competitive Analysis Process

- Comparison to industry
- Next steps

Multiple 2D charts can be drawn to compare "us" ● vs "them" ●



1. Identify the audience for your competitive analysis
2. Identify your main competitors (between 5 and 10)
  - A. Obtain information about them: market position, sales & marketing tactics, growth strategy, and other relevant business info
  - B. Find their "4 P's": Product, Pricing, Place, and Promotional strategies
3. Create SWOT analyses (see 6in6 presentation) for your company and your competitors.
4. Analyze data to
  - A. Identify key differentiators
  - B. Make business recommendations
5. Update the CA quarterly (or monthly).

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## Competitive Analysis – Example – Generic

Suppose a team wanted to expand a consulting business in some field; how to determine the competitive landscape?

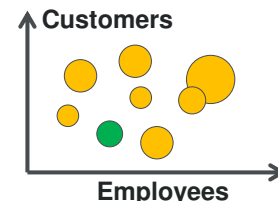
### Typical information gathering

		Competitors				
		Us	A	B	C	...
Company itself	Name / URL	x	x	x	x	
	Revenue by sector	x	x	x	x	
	Number of Employees and attrition rate	x	x	x	x	
	Number of customers	x	x	x	x	
Products	Products (or features) & prices	x	x	x	x	
	Distribution channels	x	x	x	x	
	Target audience	x	x	x	x	
	Market share	x	x	x	x	
	Quality	x	x	x	x	
Marketing efforts	Promotional strategies	x	x	x	x	
	Marketing channels	x	x	x	x	
	Customer service	x	x	x	x	
SWOT	Events	x	x	x	x	
	Strengths	x	x	x	x	
	Weaknesses	x	x	x	x	
	Opportunities	x	x	x	x	
Threats	x	x	x	x		

Dot size represents revenue. . .



Create charts relevant to the business area ...



### Therefore

- Our discriminators are: . . .
- Our next steps are: . . .

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# Constructive Cost Model (COCOMO)

## Problem

How to determine the effort to create software?

## Difficulty

Easy to use

The **Constructive Cost Model (COCOMO)** is a SW estimation model which uses SW lines of code to estimate the needed manpower effort and duration.

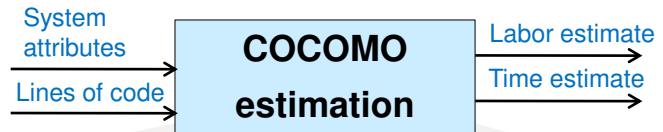
- Since programming paradigms evolve, COCOMO may be less useful than it was in the past.

## Basic COCOMO equations

- **Labor** =  $a(\text{KSLOC})^b$
- **Schedule** =  $c(\text{Labor})^d$

where

Software project type	a	b	c	d
Organic	2.4	1.05	2.5	0.38
Semi-detached	3.0	1.12	2.5	0.35
Embedded	3.6	1.20	2.5	0.32



1. Identify software product to be estimated.
2. Estimate the Software Lines Of Code (SLOC).
3. Select COCOMO model: **basic** or **intermediate**
4. Determine product attributes. For the basic model:
  - **Organic** – small team / good experience / flexible requirements
  - **Semi-detached** – medium team / mixed experience & requirements
  - **Embedded** – tight constraints
5. Create COCOMO estimates using the equations associated with the model
  - Labor is in person-months
  - Schedule is in calendar months

## Terminology

- SLOC = software lines of code
- KSLOC = kilo SLOC = 1,000 lines of code

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## COCOMO – Example – Creating SW program

### Problem statement:

You are creating a SW product; the code will be about 10,000 lines (10 KSLOC). How long it will take to create the SW and how much manpower is required?

### Answer:

1. If the SW product/team is **organic** (an experienced small team that has worked together on similar products in the past) then the parameters to use in the COCOMO equations are {a=2.4, b=1.05, c=2.5, d=0.38}. Using them
  - **Labor** (in man-months) =  $a(\text{KSLOC})^b = 2.4(10)^{1.05} = 27$
  - **Schedule** (in calendar months) =  $c(\text{Labor})^d = 2.5(27)^{0.38} = 8.7$
2. The conclusion is that a team of size 3 is needed for 9 months.

### Notes

1. For a **semi-detached** SW product/team (of the same size)
  - **Labor** = 40 man-months and **Schedule** = 9 calendar months
2. For an **embedded** SW product/team (of the same size)
  - **Labor** = 57 man-months and **Schedule** = 9 calendar months
3. **Conclusion:** The SW development will take 9 months; the team size varies based on the type of SW being developed.

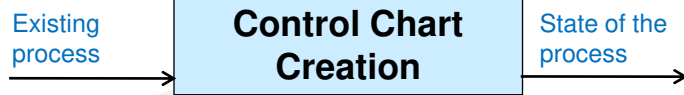
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# Control Chart

**Problem**  
How to monitor defects?

**Difficulty**  
Some training required

1. A **Control Chart** shows how a process evolves over time. It is used to monitor, control, and/or improve a process.
2. A **Control Chart** includes a
  - center line (average)
  - and the data boundaries
  - Upper Control Line (UCL)
  - Lower Control Line (LCL)
3. The UCL and LCL are three standard deviations above and below the center line.
4. Process in “statistical control” if data is between UCL & LCL.



1. Determine which of 7 types of control chart to use (see example). The choice depends on
  - A. data type, whether it is continuous or discrete
  - B. sample size, whether or not it is constant
  - C. type of analysis to be performed
2. Collect the data
3. Perform needed computations
4. Plot the results of the computation
5. Analyze the plots – look for a large variance or unusual patterns.

**There are 7 control chart types**

**1. Discrete data:** c, np, p, u

**2. Continuous data:**  
Individual Moving Range (I-MR)  
average-range (Xbar-R)  
average-sigma (Xbar-S)

**Constant sample size**

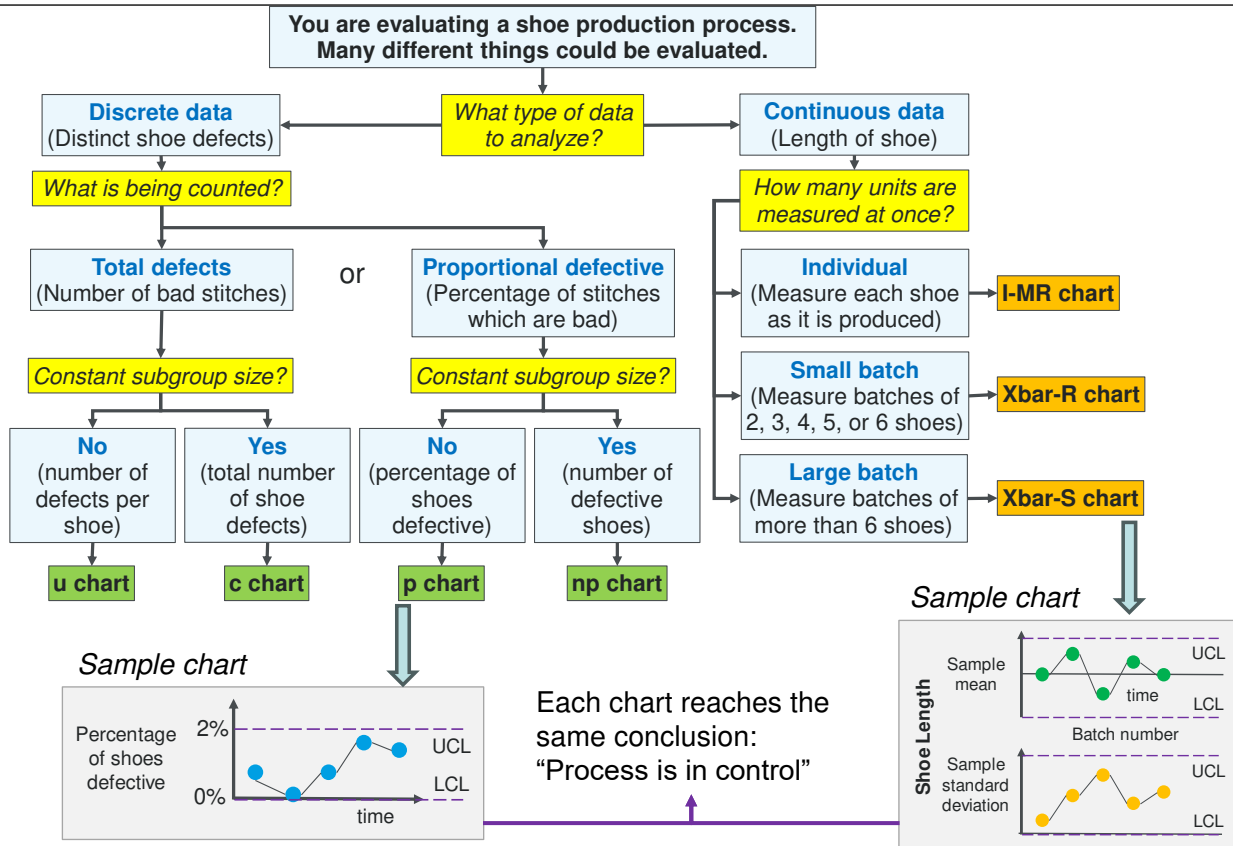
- c: count number of defects per unit
- np: count number of nonconforming items

**Proportion of nonconforming items**

- p: sample size may vary
- u: large sample size variations

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## Control Chart – Example – Shoe Production



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# Cost as an Independent Variable (CAIV)

**Problem**  
How to identify best value?

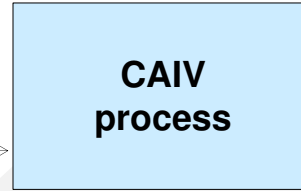
**Difficulty**

Easy to use

**CAIV** is a method to determine “best value”

- It is a structured, disciplined process that balances cost, performance, schedule, and risk to arrive at the “best value” soln
- It addresses “Total Ownership Cost” = Development + Acquisition + Ownership (direct & indirect)

- Capability needed
- Options to meet need
- Cost models



- “Best” option

**CAIV** requires

- A detailed specification of a need
- An affordability estimate
- Multiple options that meet the need
- Accurate life cycle cost models

1. Obtain specification for a needed capability
2. Aggregate all system costs (e.g., direct and indirect, acquisition and operational)
3. Identify multiple options meeting the needed capability
4. Price out the multiple options
5. Use CAIV to compare and prioritize the multiple options – that is, find the best value proposition

CAIV can prevent having to make statements such as:  
“The last 50% of the cost only bought 1% better performance”

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## CAIV – Example – Buying a car

### How to buy a car

1. Define car requirements (e.g., reliability of R, can carry P passengers)
2. Define car lifecycle budget (can spend up to D dollars over life of car)
3. Find cars meeting (R,P) and are less than D in cost
  - That is, they are in the “trade space” (e.g., used/new, high mileage/low mileage, different brands)
4. From the graph, identify the “natural breakpoints” where more money only buys marginal improvement – this is the “knee” of the curve

#### Options

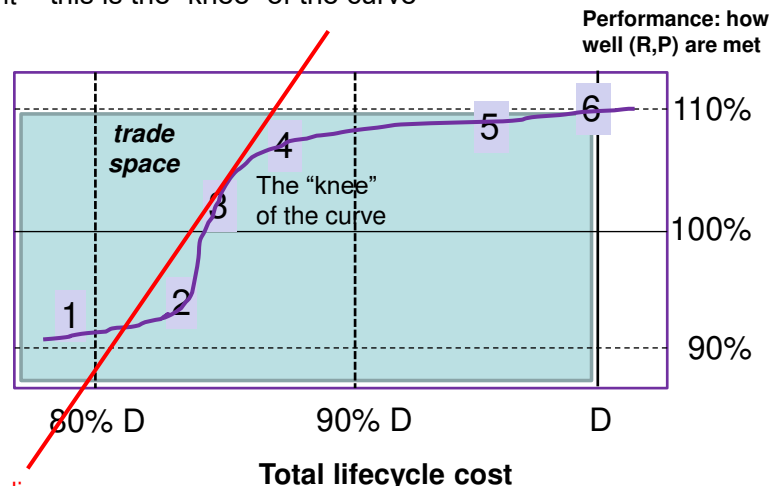
1. 15 year old car – high mileage
2. 15 year old car – low mileage
3. 5 year old car
4. 3 year old car
5. new car
6. new car – luxury brand

#### Analysis

- Graph options 1-6
- Graph has a “break point” at 105% of (R,P) and 85% of D.
- The best value occurs at a cost of less than D

#### Conclusion

- Can spend up to allowable budget (D), but obtain better “value” by spending less



High slope line – indicates a break point

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# Cost Benefit Analysis (CBA)

**Problem**  
How to financially evaluate a plan?

**Difficulty**  
Some training required

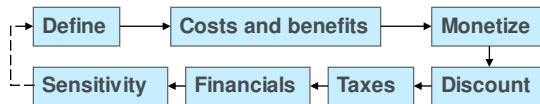
- A **Cost Benefit Analysis (CBA)** financially evaluates a plan.
- CBA compares costs and benefits
  - direct & indirect, tangible & intangible, opportunity costs, competitive benefits
 to determine financial metrics
  - net present value (NPV), internal rate of return, payback period, ownership cost
- Costs and benefits are measured in monetary terms, then discounted.
- It can be challenging to identify all relevant CBA factors.
- CBA is often used to compare multiple alternatives.

- Project plan
- Alternatives (optional)

## Cost Benefit Analysis Process

Quantitative analysis of plan(s)

1. Define the analysis framework (project scope)
  - Specify what will be changed.
  - Specify what effects must be considered.
2. Identify and classify costs and benefits.
  - That is, everything which contributes to the financial metrics.
3. Monetize the costs and benefits.
4. Discount the costs and benefits to obtain the net present values.
5. Determine the tax implications (if any).
6. Compute the desired financial metric(s).
7. Perform a sensitivity analysis to ensure credibility of results.
8. Accept results, or refine & repeat the analysis.



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# Cost Benefit Analysis – Invest in new HW and SW

**Investment cost**

Assume a 5% discount rate

**Investment benefit**

Description		Year #1	Year #2	Year #3
<b>Costs</b>				
fixed	HW	8,500	0	0
	HW license	1,000	500	500
	SW	4,000	0	0
	SW licence	2,000	2,000	2,000
variable	Advertising	1,000	2,000	3,000
	Training	1,000	1,000	500
<b>Costs - total</b>		17,500	5,500	6,000
<b>Discounted costs at 5%</b>		17,500	5,238	5,442
<b>Benefits</b>				
tangible	Retire older HW & SW	4,000	4,000	4,000
	Increased productivity	3,000	3,000	3,000
	Reduced attrition	2,000	2,000	2,000
intangible	Employee satisfaction	500	500	500
	Client satisfaction	1,000	1,000	1,000
<b>Benefits - total</b>		10,500	10,500	10,500
<b>Discounted benefits at 5%</b>		10,500	10,000	9,524

Compute discount as  
 $5,422 = \frac{6,000}{(1+0.05)^2}$

\$28,180 [ \$28K is sum of values ]

\$30,024 [ \$10.5K is sum of values ]

**Overall project benefit**

\$ 1,844 [ \$1,844 = \$30K - \$28K ]

**Benefit cost ratio**

1.07 [ 1.07 = \$30K/\$28K ]

Cash flow: inflow - outflow	\$(7,000)	\$ 5,000	\$4,500
cumulative cash flow	\$(7,000)	\$(2,000)	\$2,500

2.5K = 4.5K + (-2.0K)

**Payback period (years)**

2.44

2.44 = 2 - (-2000)/4500

**Internal Rate of return (IRR)**

23%

Jan-22	Jan-23	Jan-24
--------	--------	--------

**Payback period** is the duration to break even on the original investments

**IRR** is the discount rate which makes the net present value of the project zero. (Computed using Excel's IRR function)

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# Cost of Quality (COQ)

**Problem**  
How to minimize the cost of quality?

**Difficulty**

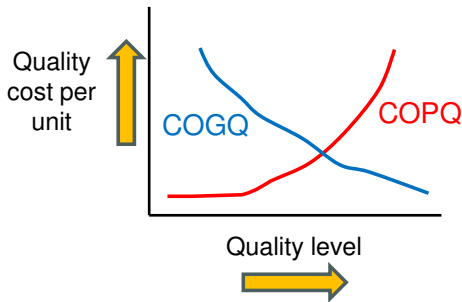
Work with an SME

- **Cost of Quality = COPQ + COGQ**
- **Cost of Poor Quality (COPQ)**
  - cost associated with poor-quality products/services
  - = Internal Failure costs + External Failure costs
- **Cost of Good Quality (COGQ)**
  - cost to prevent poor-quality products/services
  - = Appraisal costs + Preventative costs

Find 4 costs making up cost of quality

**Minimize Cost of Quality**

- Choose which cost to reduce
- Implement quality improvements



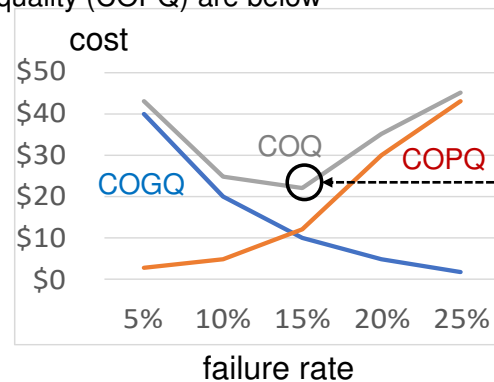
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1. Define quality goals; COQ of 10–15% may be OK
2. Collect cost data: internal failure, external failure, appraisal, prevention
3. Identify which quality costs should be reduced (if any), then use appropriate methods for each:
  - For Internal Failure costs: Poka-Yoke (Mistake-Proofing), Root Cause Analysis, ...
  - For External Failure costs: Customer Surveys, Warranty Programs, ...
  - For Appraisal costs: Statistical Process Control (SPC), Statistical inspections, ...
  - For Prevention costs: Audits, Employee Training, ...
4. Implement determined quality improvements.
5. Repeat

## Cost of Quality (COQ) – Example – Making widgets

Imagine we are making widgets.  
The per unit costs of good quality (COGQ) and poor quality (COPQ) are below

	failure rate				
	5%	10%	15%	20%	25%
<b>COGQ</b>	\$40	\$20	\$10	\$5	\$2
<b>COPQ</b>	\$3	\$5	\$12	\$30	\$43
<b>COQ (sum)</b>	\$43	\$25	\$22	\$35	\$45



For **COGQ**: it is very **expensive to have a low failure rate**

- For example: recalibrate machines every hour, update employee training weekly, many inspections of incoming materials, ...

For **COPQ**: it is very **expensive to have a high failure rate**

- For example: recalls, replacements, customer ill-will, ...

Hence, there is a value where the total cost of quality (COQ) is least.

- In the example, the COQ is minimized at \$22/unit at a common failure rate of 15%---

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# Critical Chain Program Management (CCPM)

**Problem**  
How to shorten a project schedule?

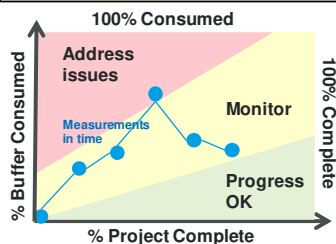
**Difficulty**  
Work with an SME

## Critical Chain Definition

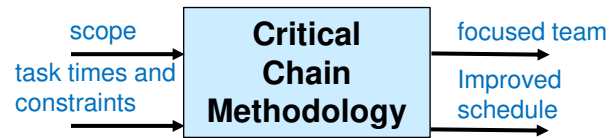
The longest chain of dependent tasks with resources de-conflicted and individual safeties removed and added back in as a project buffer

If resources are unlimited then **critical chain** and **critical path** are similar.

- **Critical Chain Program Management (CCPM)** is a management methodology which provides information on the right tasks at the right time to ensure on-time delivery.
- **CCPM** is based on the *Theory of Constraints*. In any schedule, at any time, there is **one activity** that is **gating** the progress. The goal is to **identify** that activity and **improve** it.



A "fever chart" tracks progress and indicates when corrective action is needed.



### 1. Develop a robust project plan

- Use *Reverse Planning* to create a schedule.
- Have workers create both *aggressive* and *low risk* duration estimates for tasks.
- Work to the aggressive duration estimates.
- Size and create a buffer based on the difference in duration estimates.

### 2. Identify constraints & plan Corrective Actions

#### 3. Change the culture

- Critical Chain tasks get highest priority
- Minimize multi-tasking

### 4. Proactively manage the system

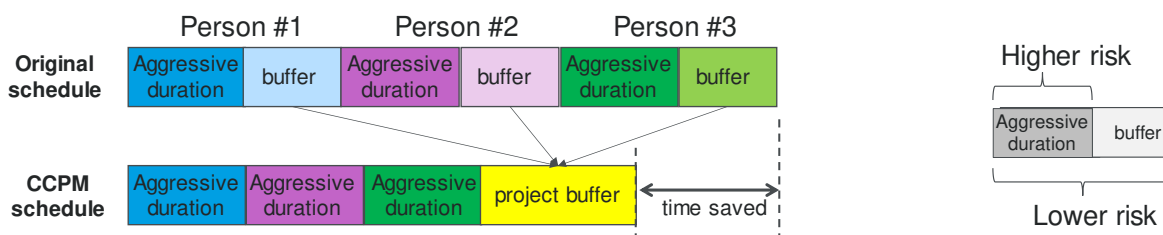
- Manage variation via the buffer

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## CCPM – Example – The CCPM Project Buffer

Consider a job that requires 3 people to perform sequential tasks.

- Each person
  - Knows the aggressive (shortest) duration it will take them to perform their task.
  - Will naturally include a buffer since they don't want to fail (and, perhaps, a task is more challenging than anticipated, or there may be interruptions or sickness).  
These individual buffers increase the overall time for the job.
- In CCPM, the aggressive durations are placed end-to-end and the *individual buffers* are statistically aggregated into an overall *project buffer*. This reduces the overall time since some, but not all, of the tasks will take longer than the minimal time.
- Management challenges include:
  - Ensuring realistic aggressive durations; failing to meet these time estimates can be both expected and desired.
  - Rescheduling is required when some tasks take more than the minimal duration.



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# Critical Parameter Management (CPM)

## Problem

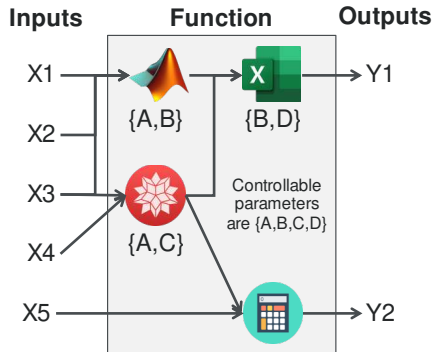
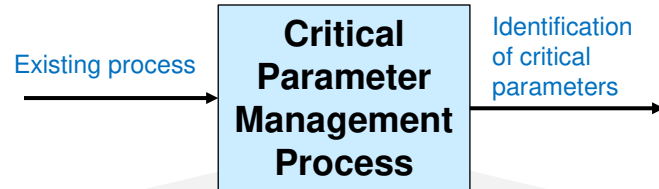
How to identify and manage critical to quality parameters?

## Difficulty

Work with an SME

### Critical Parameter Management (CPM)

- A methodology for ensuring product performance
- A mathematical process that links the inputs and outputs, to identify the parameters driving product quality



1. Determine the process flow, which must include the inputs, controllable parameters and the outputs of interest. (Typically, the output quality is of interest.)
2. With the help of an SME:
  - A. Using experimental data, mathematically model the input/output relationships.
  - B. From the model, determine which controllable inputs have the largest effect on the outputs.
    - These are the *critical parameters*
3. Ensure the process flow properly treats the critical parameters (e.g., by having precise tolerances).

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## CPM – Example – Cake Mixes

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[https://commons.wikimedia.org/wiki/File:A\\_slice\\_of\\_coconut\\_cake.jpg](https://commons.wikimedia.org/wiki/File:A_slice_of_coconut_cake.jpg)

1. From experiments
  - A. Cake mixes have essentially one critical parameter: the ratio of flour to baking powder
    - This ratio is closely monitored during production.
  - B. Cake preparation is robust to reasonable variations in:
    - Quantifies of: water, eggs, oil, cake mix
    - Cooking environment: time, temperature, humidity
  - C. Cake preparation is *not* robust to altitude. As this is not under the manufacturer's control, there are separate cooking instructions.



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# Customer Segmentation

How to improve marketing and sales?

**Difficulty**

Work with an SME

- **Customer segmentation (CS)** divides customers based on common characteristics.
- CS is tailored for each product.
- CS improves marketing efforts.
- Market segmentation relates to the whole market, CS is your part of the market.

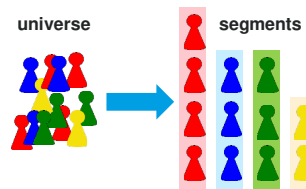
- Customer (or leads) data
- Market data & segmentation

## Customer Segmentation Process

Customer segments

1. Review industry data and market analysis.
2. Examine your current customer base.
3. Choose a customer segmentation model.
4. Consider customer segmentation software – essential for very large data collections.
5. Collect customer experience data – both direct (e.g., surveys) and indirect (e.g., social listening).
6. Analyze customer experience data.
7. Refine your customer segments, and repeat.

Segment	Question addressed
Demographic	Who are your buyers?
Psychographic	Why are they buying?
Geographic	Where are your buyers?
Behavioral	How are they buying?
Benefit	What benefits entice your buyers?
Firmographic	What business types are buying?



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## Customer Segmentation – Example – 6in6 Consulting

Consider starting a Six Sigma consulting business based on 6in6 presentations. What are the customer segments?

1. Industry data: there are many Six Sigma consulting groups, large and small (e.g., Bain & Company, KPMG, PwC). Presume we have determined the market size (e.g., engagements, dollars) and types of offerings (e.g., classes, seminars, contract work).
2. With no customers, the leads are: supporting non-profits, corporate hourly consulting on demand, teaching academic classes.

3.

Segment	Non-profits	Hourly work	Teaching
Demographic	Older	All ages	Younger
Psychographic	Teach skills they will apply themselves	Needed training and coaching	Baseline student learning, support student projects
Geographic – where to meet decision makers	At their regularly scheduled meetings	At conferences	Go to schools to meet the Dean

4. Skip SW. 5. & 6. Survey target audiences to find what they want/don't want:

<ul style="list-style-type: none"> <li>• Cost sensitive</li> <li>• Any day/time works</li> </ul>	<ul style="list-style-type: none"> <li>• Want focus in specific areas</li> <li>• Work regular hours</li> </ul>	<ul style="list-style-type: none"> <li>• Want video presentations</li> <li>• Need to be available at all hours to help students</li> </ul>
--	--	--

7. Due to lack of specific experience:
  - Drop corporate work (for now)
  - Segment non-profits by funding: low (local arts groups), high (museums)
  - Repeat analysis.

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# Dashboard

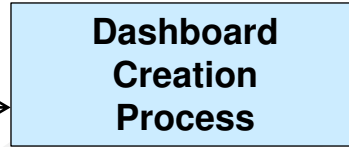
**Problem**  
How to monitor performance?

**Difficulty**

Easy to use

- A **dashboard** is a business reporting tool consolidating and displaying critical metrics and key performance indicators (KPIs) on one screen/page.
- Dashboards allow real-time performance to be monitored, usually with multiple graphics.
- Dashboards are used at every level of an organization.

Need to communicate current status



Graphical informational display

Metrics can use elements to show meta information. Below, see change in color and arrow direction



- 1. Determine audience**
  - A. Who benefits from the dashboard?
- 2. Select metrics**
  - A. Which metrics, ideally 3-7, should appear? (The audience should influence the metrics.)
  - A. Common metrics: customer complaints, product defects, safety, system downtime, or sales.
- 3. Design presentation**
  - A. How should each metric be represented?
  - B. How should the metrics appear in the display?
- 4. Implementation**
  1. How will the metric values be updated?
  2. How often will the metric values be updated?
- 5. Review and update as needed**

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## Dashboard – Example – 6in6 web site

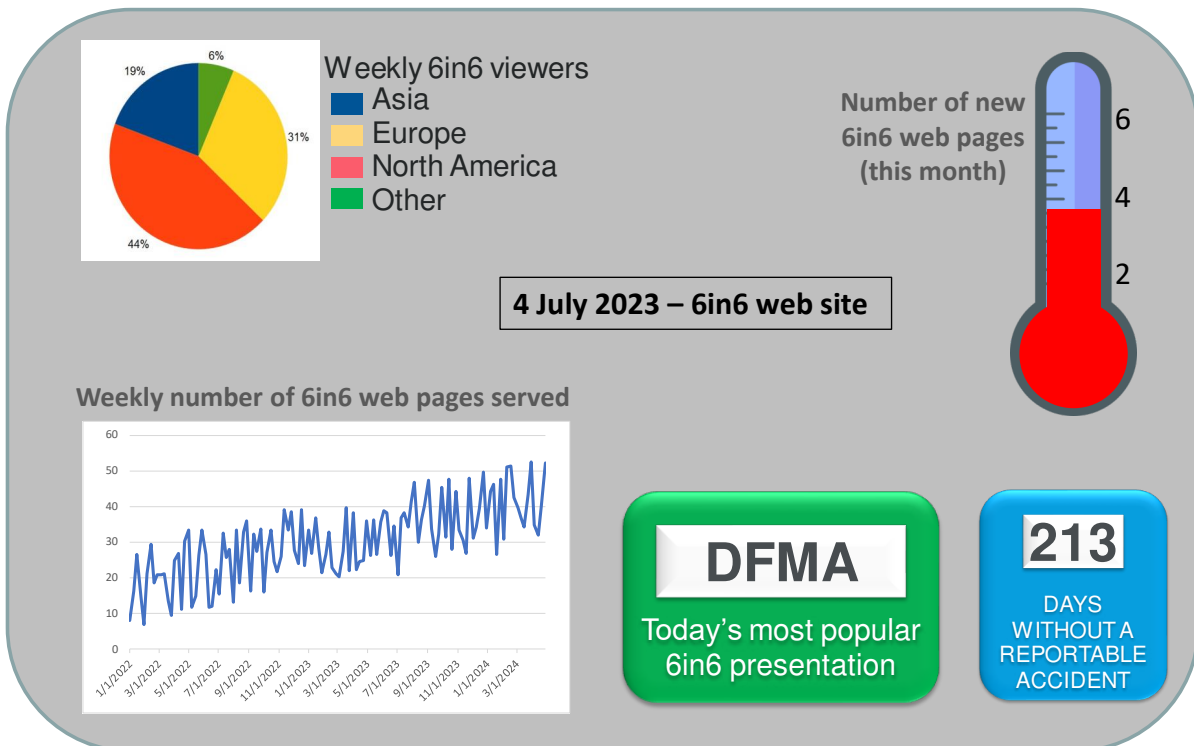


Figure credits  
<https://commons.wikimedia.org/wiki/File:Pie-chart.jpg>  
<https://openclipart.org/detail/323734/thermometer>

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# Design for Manufacturing & Assembly (DFMA)

**Problem**  
How to make products easy to construct?

**Difficulty**

Work with an SME

## Design for Assembly (DFA)

is concerned with **reducing product assembly cost**

## Design for Manufacturing (DFM)

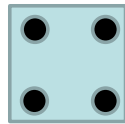
is concerned with **reducing overall part production cost**

### DFMA has many benefits

- Minimizing the number of parts and extra sizes reduces inventory and confusion during assembly
- DFMA optimizes trade-offs between assembly, part, and life cycle costs.



Asymmetric part requires alignment



Symmetric part makes assembly easier

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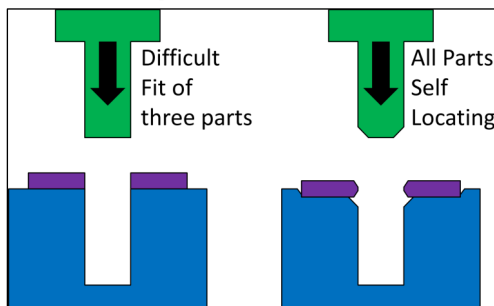


### Methodically apply the DFMA principles

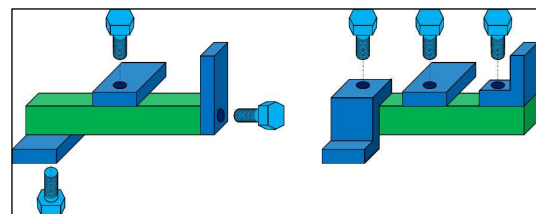
1. Minimize the number of parts
2. Minimize the use of fasteners
3. Standardize
4. Avoid difficult components
5. Use modular subassemblies
6. Use multifunctional parts
7. Minimize reorientations
8. Use self-locating features
9. Avoid special tooling
10. Provide accessibility
11. Minimize operations & process steps

## DFMA – Examples – Manufacturing

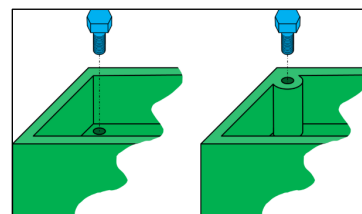
### Make parts self-aligning



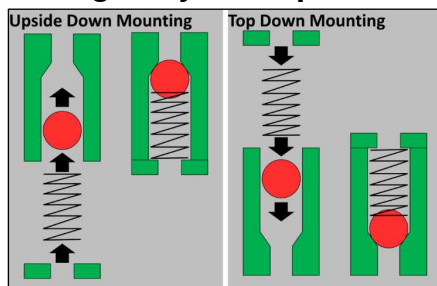
### Make assembly from one side



### Improve access for assembly



### Use gravity when possible



### Simplify fasteners

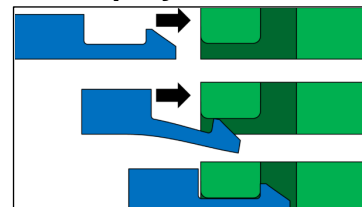


Figure credits

- <https://www.allaboutlean.com/dfma-6/dfma-self-locating-2/>
- <https://www.allaboutlean.com/dfma-6/dfma-upside-down-mounting/>
- <https://www.allaboutlean.com/dfma-6/dfma-assemble-from-one-side/>
- <https://www.allaboutlean.com/dfma-6/dfma-symmetry/>
- <https://www.allaboutlean.com/dfma-4/dfma-plastic-snap-joint/>

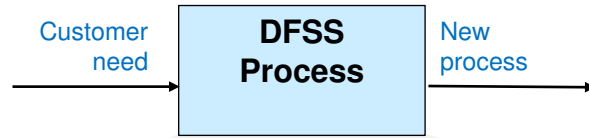
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# Design for Six Sigma (DFSS)

**Problem**  
How to create a new process?

**Difficulty**  
Work with an SME

- **Design for Six Sigma (DFSS)** is used to create new products, processes, or services.
  - And to do it right the first time.
  - Traditional Six Sigma *improves an existing product, process, or service.*
- **DFSS** methodologies include: **DCCDI** (Define, Customer Concept, Design and Implement), **IDOV** and **DMADV** (see images, below).
  - Each uses multiple 6 sigma tools.



1. Select a DFSS methodology (e.g., IDOV)
2. Follow the steps of this methodology, using six sigma tools for each step.

### IDOV (Identify, Design, Optimize, Validate)

Identify	Design	Optimize	Validate
(1) Define Customer Requirements 	(3) Identify Potential Failure Modes 	(7) Candidate Inputs 	(12) Verify Capability of Outputs 
(2) Establish Measures and Standards 	(4) Mistake Proof 	(8) Key Inputs 	(13) Perform Other Testing 
(5) Develop Measurable Outputs 	(6) Validate Measurement System 	(9) Characterize Behaviors of Key Inputs 	(11) Set Targets, Tolerances and Controls 
		(10) Discover Variable Relationships 	(14) Implement Controls 

### DMADV (Define, Measure, Analyze, Design, Verify)

Step	Description	Typical Tools Used
<b>D</b> – Define	goals of design activity	<ul style="list-style-type: none"> <li>• AHP</li> <li>• QFD</li> <li>• SIPOC diagrams</li> </ul>
<b>M</b> – Measure	stakeholder metrics	<ul style="list-style-type: none"> <li>• Surveys</li> <li>• Value Stream Analysis</li> </ul>
<b>A</b> – Analyze	the available options	<ul style="list-style-type: none"> <li>• QFD</li> <li>• Statistical tools</li> </ul>
<b>D</b> – Design	the new product	<ul style="list-style-type: none"> <li>• FMEA</li> <li>• DFMA</li> <li>• TRIZ</li> </ul>
<b>V</b> – Verify	the design in the real world	<ul style="list-style-type: none"> <li>• Pilot tests</li> <li>• SPC &amp; control charts</li> </ul>

<https://isowatch.wordpress.com/2018/10/23/six-sigma-is-draining-employees-creativity/>  
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## DFSS – Example – Bicycle Manufacturer

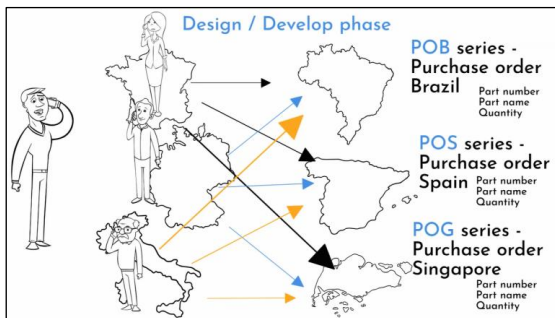
- Images below are from “How to do DMADV Process? Supply Chain Easy Example” at <https://sixsigmamania.com/?p=338> (with permission)
- For each step, use multiple six sigma tools (some are listed below)

- Select **DMADV** process. Then:
1. **Define:** Voice of the customer, SWOT, current state analysis, Kaizen, SIPOC
  2. **Measure:** critical parameter management
  3. **Analyze:** value stream map
  4. **Design:** balanced scorecard, FMEA, control plan
  5. **Verify:** Gage R&R

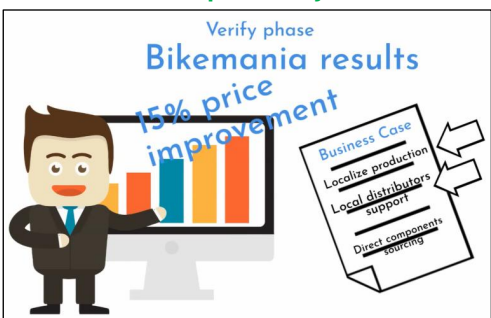
### Step 1: Define



### Step 4: Design



### Step 5: Verify



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# Design of Experiments (DOE)

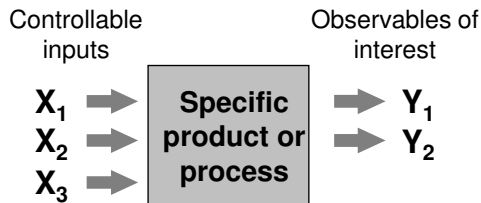
**Problem**  
How to determine the factors controlling an output?

**Difficulty**

Work with an SME

- **Design of Experiments (DOE)** is a cost effective statistical approach that quantifies the effect of inputs on outputs.
- DOE makes specific changes to inputs and observes the resulting outputs.

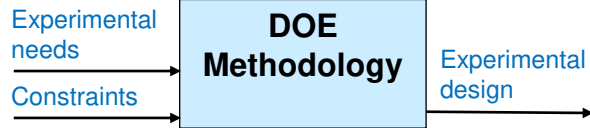
**This is the system**



- **Problem** – find inputs to minimize (say) the observables, using as few tests as possible.
- **Solution** – use the model below – observables depend on the inputs, with (usually) the earlier terms being more important than later terms:

$$Y_i = \bar{Y} + \sum_i a_i X_i + \sum_{i,j} b_{ij} X_i X_j + \dots$$

Labels: overall mean (under  $\bar{Y}$ ), main effects (under  $\sum_i a_i X_i$ ), Two-way interactions (under  $\sum_{i,j} b_{ij} X_i X_j$ )



1. Define the test objective(s)
  - What is the overall problem?
2. Select and quantify the critical response(s)
  - What observables are of concern?
3. Design the experiment (incorporate features such as randomization, replication, and blocking)
  - Define all the inputs for each test
4. Perform all the tests and collect the data
5. Analyze the data (use a SW package)
6. Interpret the results
7. Verify the predicted outcome

**Terminology**

- Each input has “levels” (perhaps 3 different values for  $X_1$  and 4 different values for  $X_2$ ).
- A “**full factorial design**” has a test for every possible combination of levels.
- A “**partial or fractional factorial design**” uses a subset of the tests in the full factorial design.

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## DOE – Example – Golf score

Example from: Jack B. ReVelle, *Manufacturing Handbook of Best Practices: An Innovation, Productivity, and Quality Focus*, [https://books.google.com/books?id=\\_EfMBQAAQBAA&pg=PP5](https://books.google.com/books?id=_EfMBQAAQBAA&pg=PP5)

(1) Want to minimize a golf score based on the following 7 controllable inputs. (Note that each input has 2 levels.)

	Inputs	Level (-1)	Level (+1)
A	Age of clubs	Old	New
B	Time of day	AM	PM
C	Use golf cart	No	Yes
D	Practice at driving range	Yes	No
E	Drink during game	Yes	No
F	Type of ball	Wilson	Titleist
G	Use of caddy	Yes	No

(2) A full factorial seven factor design at 2 levels has  $2^7=128$  experiments. Instead, use 8 experiments:

		Inputs (encoded)							Observation			
		A	B	C	D	E	F	G	Y <sub>1</sub>	Y <sub>2</sub>	Y <sub>3</sub>	Y <sub>4</sub>
Experiment	#1	-1	-1	-1	-1	-1	-1	-1				
	#2	-1	-1	1	-1	1	1	1				
	#3	1	1	-1	1	-1	1	1				
	#4	-1	1	1	1	1	-1	-1				
	#5	1	-1	-1	1	1	-1	1				
	#6	1	-1	1	1	-1	1	-1				
	#7	1	1	-1	-1	1	1	-1				
	#8	1	1	1	-1	-1	-1	1				

Observed values go here

(3) Convert to input levels and perform the experiments. Potential observable values are shown.

		Input values							Golf score
		A	B	C	D	E	F	G	Y <sub>1</sub>
Experiment	#1	Old	AM	No	Yes	Yes	Wilson	Yes	84
	#2	Old	AM	Yes	Yes	No	Titleist	No	96
	#3	Old	PM	No	No	Yes	Titleist	No	89
	#4	Old	PM	Yes	No	No	Wilson	Yes	97
	#5	New	AM	No	No	No	Wilson	No	94
	#6	New	AM	Yes	No	Yes	Titleist	Yes	91
	#7	New	PM	No	Yes	No	Titleist	Yes	94
	#8	New	PM	Yes	Yes	Yes	Wilson	No	92

(4) A simple analysis finds the most important inputs (to leading order) – these cause the largest change.

Inputs	Levels	Totals	Means	Effect
A Age of clubs	Old	366	91.50	1.25
	New	371	92.75	
B Time of day	AM	365	91.25	1.75
	PM	372	93.00	
C Use golf cart	No	361	90.25	3.75
	Yes	376	94.00	
D Practice at driving range	Yes	366	91.50	1.25
	No	371	92.75	
E Drink during game	Yes	356	89.00	6.25
	No	381	95.25	
F Type of ball	Wilson	367	91.75	0.75
	Titleist	370	92.50	
G Use of caddy	Yes	366	91.50	1.25
	No	371	92.75	

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# Design Thinking

## Problem

How to address an ill-defined problem?

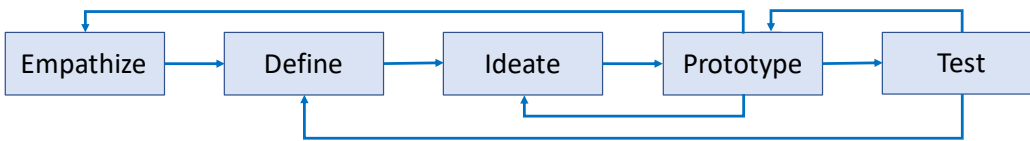
## Difficulty

Work with an SME

- **Design Thinking** (DT) is an innovation approach which: empathizes with users, creates artifacts that address user needs, tests those artifacts, analyzes feedback, and continuously reworks the solution.
- DT usually has 5 steps: *Empathize, Define, Ideate, Prototype, and Test.*
- While DT steps are shown sequentially, rarely do they occur in a linear fashion. Usually, “backward” steps occur as the team learns more about user needs.
- DT does not address the entire life cycle of a product or solution, it only focuses on specific problems within the life cycle.



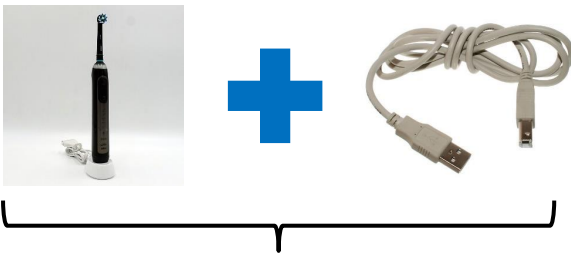
- The following steps do not often occur linearly!
1. Empathize with your users
    - Determine how users interact with their environment in the context of the problem space.
  2. Define the problem
    - Create a high-level human-centric statement that encapsulates the problem to be solved.
  3. Start generating ideas
    - Generate as many ideas as possible to translate the problem statement into practical solutions.
  4. Build a prototype
    - Take the most promising product ideas and create minimum viable product (MVP) versions.
  5. Test your solution
    - Use test feedback to fine-tune the MVPs.



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## Design Thinking – Example – electric toothbrush

1. The web has many examples of Design Thinking.
2. An example is the design of the Braun / Oral-B electric toothbrush. Apparently:
  - A. An initial Braun goal was to create a high-tech toothbrush that gave feedback to users on how well they brushed.
  - B. After user discussions, it was determined that users wanted a less stressful brushing experience.
  - C. Some stress related to the charging of an electric toothbrush.
  - D. Braun changed their goal and created an electric toothbrush that uses USB charging.



New product: “Technical Portable Compatible for Braun Oral b Replacement Oral Charger Durable Convenient Electric Toothbrush Holder USB”

[https://commons.wikimedia.org/wiki/File:A-B\\_Usb\\_Cable.jpg](https://commons.wikimedia.org/wiki/File:A-B_Usb_Cable.jpg)  
[https://commons.wikimedia.org/wiki/File:Oral-B\\_Genius\\_X\\_Electric\\_Toothbrush\\_-\\_48263286922.jpg](https://commons.wikimedia.org/wiki/File:Oral-B_Genius_X_Electric_Toothbrush_-_48263286922.jpg)

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The web has examples of Design Thinking applied to problems in:

- Education
- Financial Services
- Healthcare
- Journalism
- Non-Profit/NGOs
- Retail
- Technology
- Transportation

# Design Verification Plan and Report (DVP&R)

## Problem

How to document a product's acceptability?

## Difficulty

Some training required

- The **Design Verification Plan (DVP)** documents the strategy used to verify that a product (or system) meets its requirements (e.g., design specifications).
- The **Design Verification Report (DVR)** documents the test results obtained by using the **DVP**.
- A **Design Verification Plan and Report (DVP&R)** combines the **DVP** and the **DVR**.
- A **DVP&R** may be used for legal or product "sell off" purposes.
- A **DVP&R** has no standard format.



- If not available, create the product's planned tests:
  - Articulate the product's functionality.
  - Define discrete and actionable functionality tests for the anticipated environments
- Create a Design FMEA for the product to identify failure modes not detected in the planned tests.
- Create the **Design Verification Plan (DVP)**
  - Include the planned tests.
  - Include tests to address the deficiencies identified by an FMEA.
- Perform the tests in the **DVP** and document the results in the **DVR**.
- If needed, use the **DVR** results to update the **DVP** and repeat the process.
- Create the **DVP&R** and file appropriately.

The Who / When / Why of the testing					
Details of each planned test			Details of each completed test		

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## DVP&R – Example – Automobile Radar

Product Name	Automobile Radar	Component	Sub-system #3	Requester	Ron
Model Number	Rev 2.5.4	Test spec	Test #3-4-7	Date	2/15

**Heading**

- part info
- dates

Verification Plan										Verification Report			
Test Number	Test Name	Test or Action	Acceptance Criteria	Responsibility	Tester	Sample Size	Sample Type	Test Start	Test End	Reviewer	Results	Comments	Date
1	Signal Processing Design	SW Test #3: clutter rejection	> 27 dBsm rejection	Lisa	George	500	SW	2/18	2/20	Quality (Nancy)	28.5 dBsm	pass	2/22
2	Signal Processing Firmware	Track Test #27: clutter rejection	> 27 dBsm rejection	Ben G.	Alice	10	mock-up	3/14	3/14	Quality (Nancy)	29.5 dBsm	pass	3/14
3	Signal Processing HW	Vehicle Test #8: clutter rejection	> 23 dBsm rejection	Carla	David (drive team)	5	pre-production	4/12	4/18	Quality (Ralph)	23.5 dBsm	pass	4/21
4	Design Review	Design Review of clutter rejection capability	Software, Systems, and Quality teams agreement	Harry	N/A	N/A	N/A	4/23	4/23	Quality (Ralph)	N/A	Meeting held	4/23
5	Recommended Action	Determine why track and vehicle test results were so different	Results by 5/15	Harry									
6	Recommended Action	Approve for production	Today (4/23)										
7	Recommended Action	...	...										

**Details of every test planned:** test name, test method or procedure, test equipment, test performance (e.g., sample size and acceptance criteria)

**Details of every test performed:** test start & end times, results, comments, ...

### Verification Plan

### Verification Report

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# Enterprise Architecture

**Problem**  
How to fully describe a project?

**Difficulty**  
Work with an SME

1. An **Enterprise Architecture (EA)** is a framework that outlines an organization's structure and operations
2. An EA's artifacts includes models, documents, and specifications.
3. Example EAs include DoDAF (52 artifacts in 8 categories) the Zachman Framework (36 artifacts), and TOGAF.
4. Usually, only a subset of an EA's artifacts are created.

**DoDAF** (Department of Defense Architectural Framework) has 8 categories of elements:

1. All Viewpoint (AV)
2. Capability Viewpoint (CV)
3. Data and Information Viewpoint (DIV)
4. Operational Viewpoint (OV)
5. Project Viewpoint (PV)
6. Services Viewpoint (SvcV)
7. Standards Viewpoint (StdV)
8. Systems Viewpoint (SV)

- Project concept
- Subject matter experts



Project details at all levels for all customers

1. Select an Enterprise Architecture (EA)
2. Decide on which elements in the EA to create
  - A minimal list of DoDAF artifacts could include
  - AV-1 : Overview and Summary Information
  - AV-2 : Integrated Dictionary
  - OV-1 : High Level Operational Concept Graphic – **most common**
  - OV-2 : Operational Node Connectivity Description
  - OV-3 : Operational Informational Exchange Matrix
  - OV-5 : Operational Activity Model
  - StdV-1 Standards Profile
  - SV-1 : System Interface Description
3. Create the artifacts and review with stakeholders

The **Zachman Framework** has (an example instantiation is below)

- **6 descriptive areas:** data, function, network, people, time, motivation
- **6 perspectives:** planner, owner, designer, builder, subcontractor, enterprise

**TOGAF** (The Open Group Architecture Framework) uses 4 architecture domains: Applications, Business, Data, and Technical

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## Enterprise Architecture – Example – Phone App

- Consider creating a phone application (although, there is little below related to this choice).
- We choose to use the Zachman framework to illustrate a set of possible artifacts.
- The 6 perspectives (rows) can be interpreted in different ways; three are shown.
  - For example #1 is: "Objective /Scope" or "Contextual layer" or "Role: Planner"
- The cells in the 6-by-6 grid below contain only some of the items that could be in that cell.

**6 perspectives – must be in this top-down order**

**6 descriptive areas – can be in any order – 2 possibilities are shown**

	What	How	Where	Who	When	Why
	Data	Function	Network	People	Time	Motivation
(1) <b>Objective/Scope</b> Contextual layer Role: Planner	Business vision & goals	Business processes	Business locations	Departments involved	Future products road map	User needs. app business case
(2) <b>Enterprise model</b> Conceptual layer Role: Owner	Short term goals	App financing, hiring, training	Project locations	Stakeholders buy-in plan	Product release timeline	App alignment with other offerings
(3) <b>System logic</b> Logical layer Role: Designer, Architect, or General Manager	App look and feel	System architecture (e.g., support capabilities)	System connectivity	User interface design	Master schedule	App functionality
(4) <b>Technology model</b> Physical model Role: Builder, General Contractor, or Local Manager	Platform description, wireframe model	App requirements	Technology architecture (e.g., component libraries)	Skill identification	Development milestones	Define function capabilities
(5) <b>Detailed representation</b> Detailed model Role: Scientist, Engineer, Subcontractor, or Programmer	Interface definitions, database schema, code	App design	Communications architecture	Security design	Implementation model (e.g., scrum)	Motivate team to create successful product
(6) <b>Functioning result</b> Enterprise release Role: End user	User data needs	Usage instructions	User locations (e.g., sales roll-out plan)	Market segmentation	App responsiveness	Motivation for end-users to obtain and use app

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# Failure Mode Effects and Analysis (FMEA)

**Problem**  
How to anticipate and mitigate potential problems?

**Difficulty**  
Some training required

**FMEA** is a **systematic, proactive method** for evaluating a process

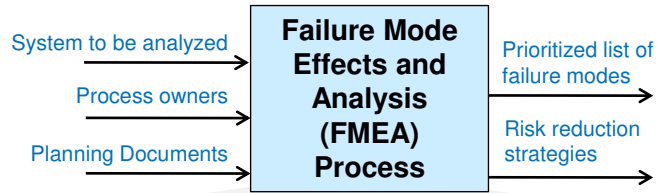
- to identify **where and how it might fail** and
- to assess the **relative impact of different failures**

in order to **identify** where the process must be **changed**

FMEAs should be created whenever a failure can result in harm.

**FMEA types include:**

- Design (DFMEA)** focuses on components and subsystems
- Process (PFMEA)** focuses on manufacturing and assembly processes



- Process**
- Determine **FMEA type**: **Defect (FMEA)**, **Design (DFMEA)**, or **Process (PFMEA)** and obtain appropriate standardized tables
  - Identify potential failure modes.
  - For each failure mode, using standardized tables, assess the following on a 1-10 scale:
    - Severity** rating (how bad it is, if it occurs)
    - Occurrence** rating (how often it will occur)
    - Detectability** rating (how likely it is to be detected, if it occurs)
  - For each failure mode, multiply the above three numbers (each is between 1 to 10) to obtain a **Risk Priority Number (RPN)**
  - For the failure modes with the **highest RPN** values, determine mitigation strategies

$$RPN = SEV \times OCC \times DET$$

Effects
Causes
Controls

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## FMEA – Example – Giving a presentation

For simplicity, instead of using values 1 to 10 for {S,O,D}, use the values {1,3,9}.  
The numbers in the grid match the words used.

RPN value is the product of the S, O, D values

Failure mode	Severity	Occurance	Detection	S	O	D	RPN	Mitigation
Forget to show up	High	Medium	Medium	9	3	3	81	Contact on event day
Forget to bring presentation	High	Low	Medium	9	1	3	27	Email presentation
Can't find location	High	Low	High	9	1	1	9	Low RPN values do not need mitigation strategies
Hungry during presentation	Low	Medium	High	1	3	1	3	

- High severity – which is bad – gets a 9
- High detectability – which is good – gets a 1

Automobile Industry Action Group (AIAG) created the following standards for the North American auto industry

### Severity

EFFECT	CRITERIA: SEVERITY OF EFFECT	RANKING
Hazardous - without warning	May endanger machine or assembly operator. Very high severity ranking when a potential failure mode affects safe vehicle operation and/or involves noncompliance with government regulation. Failure will occur without warning.	10
Hazardous - with warning	May endanger machine or assembly operator. Very high severity ranking when a potential failure mode affects safe vehicle operation and/or involves noncompliance with government regulation. Failure will occur with warning.	9
Very High	Major disruption to production line. 100% of production scrap. Vehicle/item inoperable, loss of primary function.	
High	Minor disruption to production line. Product not usable. Vehicle operable with performance degradation. Customer dissatisfied.	
Moderate	Minor disruption to production line. A portion of production scrap. Vehicle/item unusable. Comfort/Convenience item(s) inoperable. Customer dissatisfaction.	

### Likelihood / Occurrence

Probability of Failure	Possible Failure Rates	Ppk	Ranking
Very High: Failure almost inevitable	≥ 1 in 2	≤ 0.33	10
High: Generally associated with processes similar to previous processes that have often failed	1 in 3	≥ 0.33	9

### Detectability

Detection	Criteria: Likelihood the Existence of a Defect will be Detected by Process Controls Before Next or Subsequent Process, or Before Part or Component Leaves the Manufacturing or Assembly Location	Ranking
Almost Impossible	No known control available to detect cause/mechanism of failure or the failure mode	10

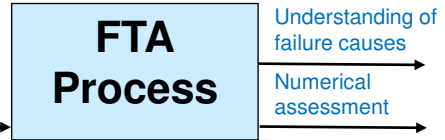
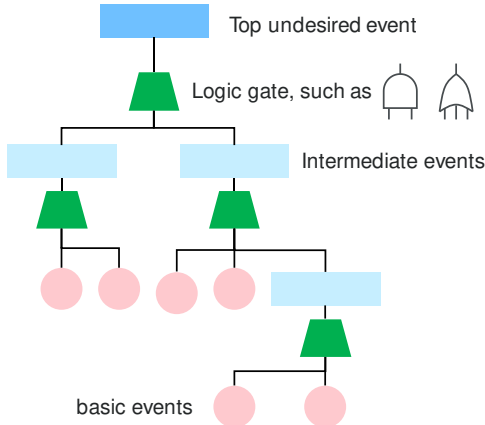
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# Fault Tree Analysis (FTA)

**Problem**  
How to quantify a specific type of failure?

**Difficulty**  
Work with an SME

- **Fault tree analysis (FTA)** is a top-down failure analysis in which an undesired system state (e.g., a failure mode) is analyzed using Boolean logic, combining lower-level events.
- FTA maps the relationship between faults and subsystems via a system level logic diagram.
- FTA can quantify the likelihood of failure.
- FTA can be used in the design process.
- FTA diagrams use a standard set of symbols.



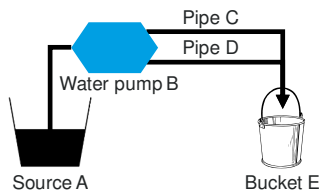
1. Define the top undesired event to investigate.
2. Identify first level contributors, just below the top level, and link these to the top level event using logical gates (e.g., AND and OR gates).
3. Identify the second level contributors and link to the first level contributors using logical gates. Continue with 3<sup>rd</sup>, 4<sup>th</sup>, etc level until basic events (root causes) are identified.
4. Construct the fault tree. Use numerical values (e.g. rates) for the basic events, if known.
5. Evaluate the fault tree.
  - A. Simplify the fault tree, if possible.
  - B. Determine the “cut sets,” the event combinations which cause the top event. Determine the “minimal cut sets,” the cut sets for which removing any event prevents the top event.
  - C. Determine the likelihood of the top event, if numerical values are available.
6. Address (e.g., mitigate) the identified issues.

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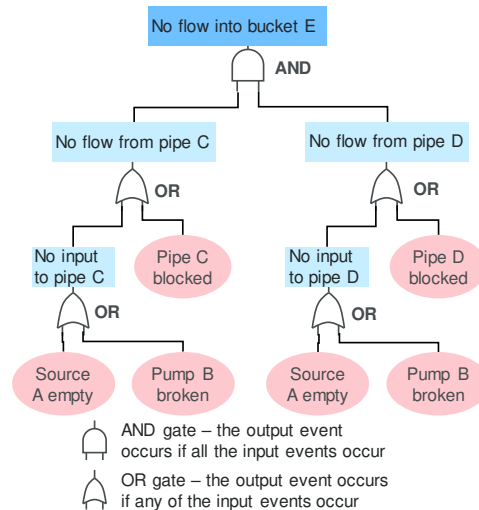
## FTA – Example – Pumping Water

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[https://commons.wikimedia.org/wiki/File:Ball\\_\(PSF\).png](https://commons.wikimedia.org/wiki/File:Ball_(PSF).png)  
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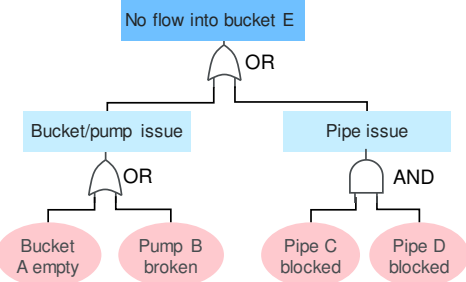
(1) Consider pumping water from Source A to Bucket E, using a pump and two pipes



(2) A fault tree of the pump system is below



(3) Using Boolean logic rules, the fault tree can be simplified to the one below



(4) The minimal cut sets are (any of these cause failure):

- Source A is empty
- Pump B is broken
- Pipe C is blocked and pipe D is blocked.

(5) If  $\{P_A, P_B, \dots\}$  are the failure probabilities for components  $\{A, B, \dots\}$  then the probability of no flow to bucket E (that is,  $P_E$ ) is given by

$$P_E = 1 - (1 - P_A)(1 - P_B)(1 - P_C P_D)$$

**Example:** If each component has a 10% likelihood of having failed then the probability of no flow to bucket E is 20% since

$$P_E = 1 - (1 - 0.1)(1 - 0.1)(1 - 0.1 * 0.1) = 0.20$$

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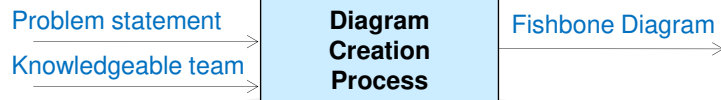
# Fishbone Diagram / Ishikawa Diagram / Cause-and-effect Diagram

**Problem**  
How to identify root causes?

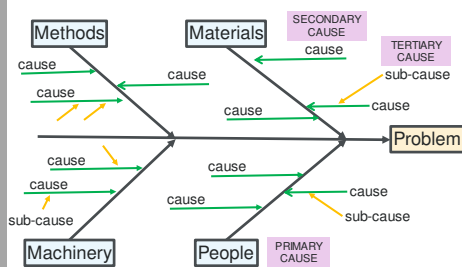
**Difficulty**

Easy to use

- A **fishbone diagram** is a visual tool for identifying and displaying potential causes of a problem.
- A fishbone diagram determines increasingly detailed causes until a root cause is identified.
- Using the given initial structure, ask "Why?" to go from primary causes to sub-causes to sub-sub-causes (similar to the "5 Whys" technique)



1. Identify the problem to be analyzed. Write this as the mouth of the "fish" (typically on the right).
2. Select 4-8 primary causes – see below – to analyze the problem; these are the major bones of the fish.
3. For each primary cause identify as many secondary causes as possible and add them to the fishbone.
4. For each secondary cause identify as many tertiary causes as possible and add them to the fishbone.
5. Analyze the diagram to identify the causes that require deeper investigation.

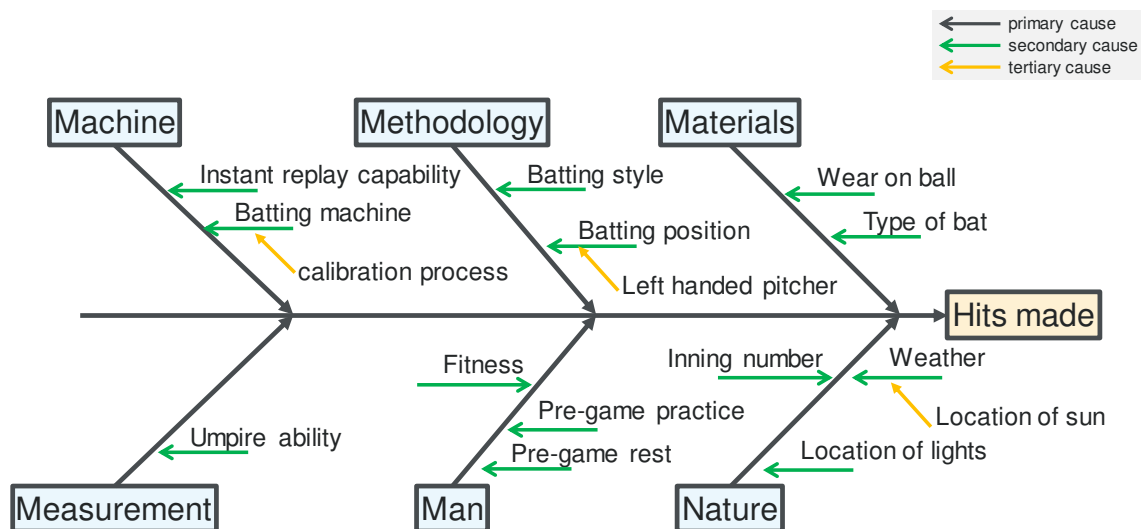


### Common Primary Causes

- **3M's & P** Methods, Materials, Machinery, and People
- **4P's** Policies, Procedures, People and Plant
- **6M's** Machine, Methodology, Materials, Measurement, Man, and Nature
- **8P's** Price, Promotion, People, Processes, Place / Plant, Policies, Procedures & Product (or Service) *(for administration)*
- **4S's** Surroundings, Suppliers, Systems, Skills *(for services)*

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## Fishbone Diagram – Example – Baseball team hits



1. For the primary causes, this fishbone started with the 6M's {Machine, Methodology, Materials, Measurement, Man, Mother Nature}. Other possibilities could have been used.
2. By brainstorming on each primary (and then secondary) cause, you can sometimes identify non-obvious potential causes. For example, under "Nature / Weather" the location of the sun may be an issue in non-US baseball parks.

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# Force Field Analysis

**Problem**  
How to implement a desired change?

**Difficulty**

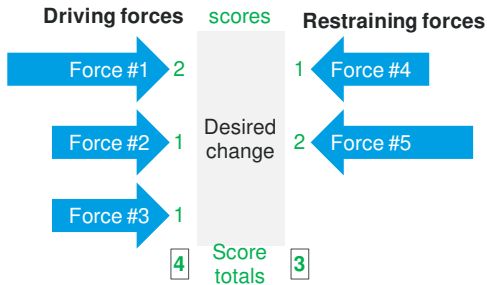
Easy to use

**Force field analysis** helps identify those forces that help accomplish a goal and those forces that hinder the attainment of that goal.

Desired change →

**Force Field Analysis**

→ Strategy to implement change



**Forces**

- *favorable* (same as) *driving*
- *unfavorable* (same as) *restraining*

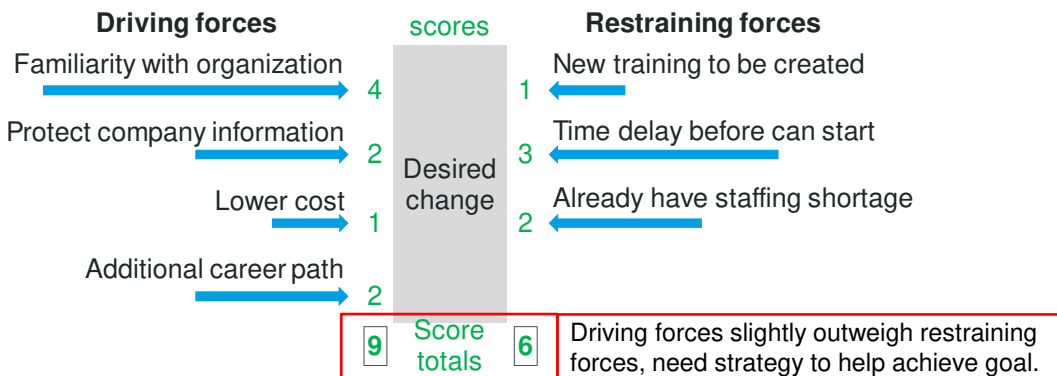
1. Clearly define the desired change.
2. Determine *favorable* driving forces for the change
3. Determine *unfavorable* driving forces for the change
4. Score the driving forces according to the degree of influence (low numbers for less influence and high numbers for more influence).
  - In a graphic, vary the length of the arrow.
5. Total the scores.
6. If the difference between favorable and unfavorable driving forces is too small, create a strategy to
  - strengthen the favorable driving forces; and
  - weaken the unfavorable driving forces.
7. Repeat steps 2-6.

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## Force Field Analysis – Example – Hire Consultants

**Goal:** Use *internal consultants* instead of hiring *external consultants*.

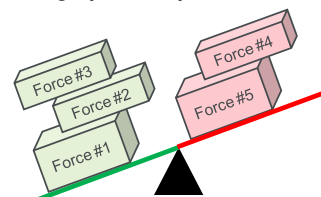
**Force Field Analysis:** Might look like the following:



Hence, to encourage the desired change (that is, “use internal consultants”), you could, before promoting this change:

1. Codify the roles and responsibilities of consultants (needed for training) – **partially mitigates** “New training ...”.
  2. Encourage potential internal consultants to take workplace training for new roles – **partially mitigates** “Time delay ...”.
  3. Increase staffing efforts – **partially mitigates** “Already have ...”.
- These activities will increase the value of (driving-restraining) forces.

**A graphical representation**



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# Future Back

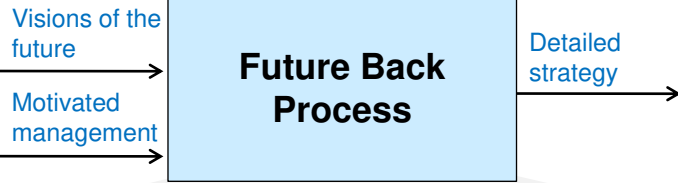
## Problem

How to create a strategy?

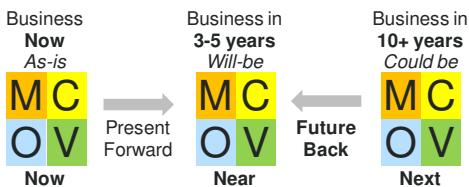
## Difficulty

Some training required

- **Future-back** (or **backcasting**) is a strategy development tool.
- “Present-forward” leaders incrementally improve the current state based on forecasts. “Future-back” leaders visualize a future state and then pursue it.
- Future-back thinking *complements* present-forward thinking; it does not replace it.



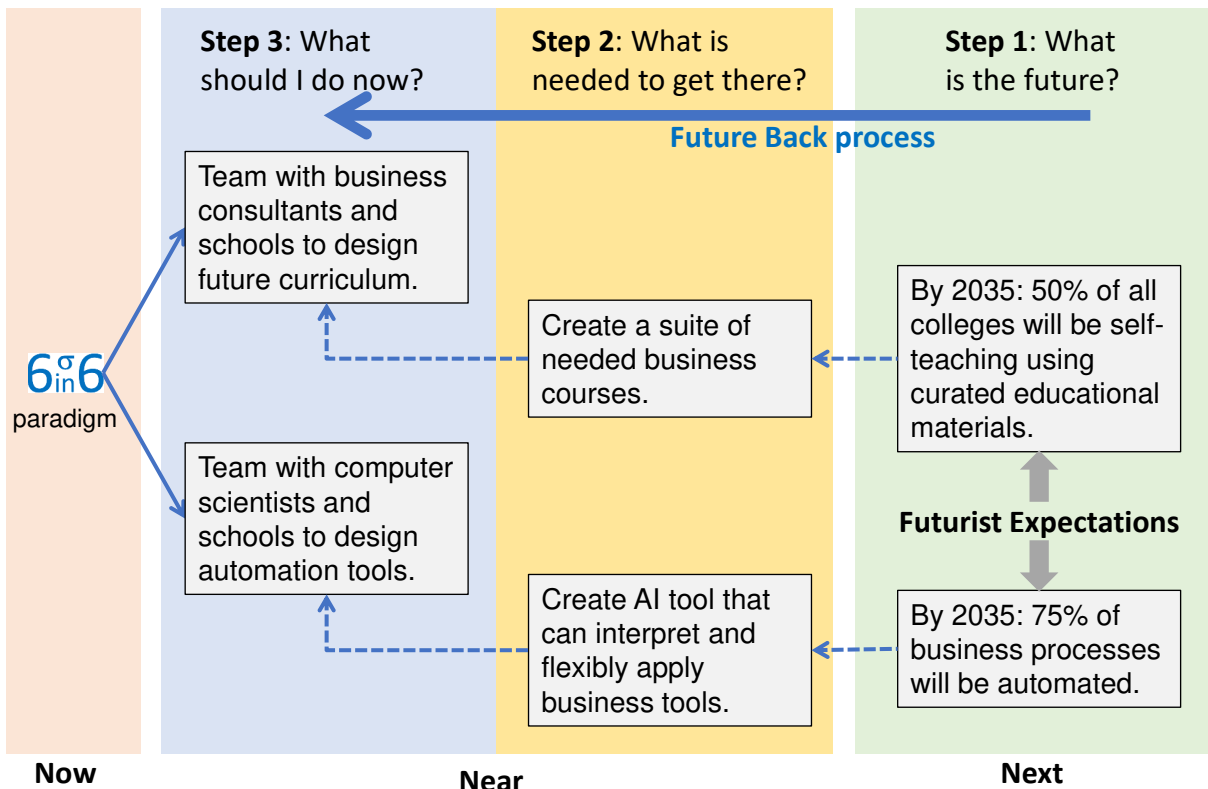
1. Imagine the desired/ideal future state (“moonshot”)
  - It does not need to be achievable with today’s technology and financial resources.
  - Each future state is detailed with a date.
  - Select 2 to 5 future states; not all the desired future states will materialize.
2. Convert the vision to strategy
  - Chart a path to each future state.
  - Set achievable goals.
  - Obtain management buy in.
  - List the milestones along the path.
3. Focus on the first milestone and get started
  - Perform course corrections, as needed
  - Pivot as needed; cancel the effort if needed



**M** = Mission  
**C** = Customers  
**O** = Operations  
**V** = Value proposition

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## Future Back – Example – Future of 6in6 paradigm



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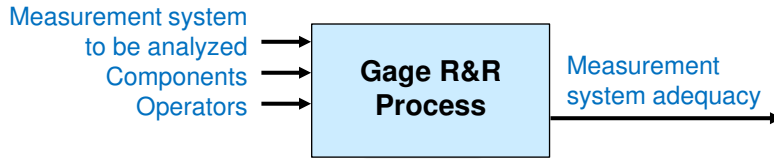
# Gage R&R (Reproducibility & Repeatability)

**Problem**  
Hot to assess a measurement system?

**Difficulty**

Work with an SME

A **Gage R&R (GRR)** study finds the **measurement error** in a measurement system. It addresses measurement system **precision** (it does not address **accuracy**).



Measurement variance includes  
The **product variation**  
The **equipment variation** (repeatability)  
The **operator variation** (reproducibility)

There are different **Gage R&R** approaches  
ANOVA approach  
AIAG approach  
EMP approach ("evaluating the measurement process")

## Process

1. Determine standard that must be met  
Example: AIAG = Automotive Industry Action Group
2. Specify measurement strategy  
Example: 10 parts & 3 operators & 3 measurements each
3. Specify how samples are obtained  
Example: "randomly" or "sequentially"
4. Obtain samples
5. Obtain measurements
6. Perform analysis of data and make conclusions  
Use of a software package is recommended!
7. Document the results

## GRR Types

- **Crossed GRR:** each operator measures each part
- **Nested GRR:** only one operator measures each part

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# Gage R&R – Example – Sample output from Minitab

This table was created by Minitab

Inputs: piece number, operator number, measurement value

Source	StdDev (SD)	Study Var (6 * SD)	%Study Var (%SV)	%Tolerance (SV/Toler)	%Process (SV/Proc)
Total Gage R&R	0.30237	1.81423	27.86	15.12	43.20
Repeatability	0.19993	1.19960	18.42	10.00	28.56
Reproducibility Operator	0.22684	1.36103	20.90	11.34	32.41
Part-To-Part	1.04233	6.25396	96.04	52.12	148.90
Total Variation	1.08530	6.51180	100.00	54.26	155.04

## Key values

**%Study Var** uses the sample's standard deviation  
**%Process** uses (historical) process standard deviation

**Key error contributions**

Number of Distinct Categories = 4

## Number of Distinct Categories (NDC)

NDC is the number of non-overlapping 97% confidence intervals that span the product variation. Often, require NDC > 5 for study validity.

### Example category names

NDC = 3 → {Low, Medium, High}

NDC = 5 → {Very Low, Low, Medium, High, Very High}

What percentage of the allowed tolerance has been used

**Conclusion:** Since this value is between 10% and 30%, the measurement system is marginally acceptable

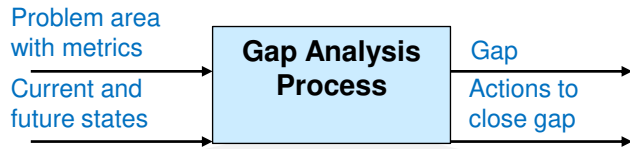
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# Gap Analysis

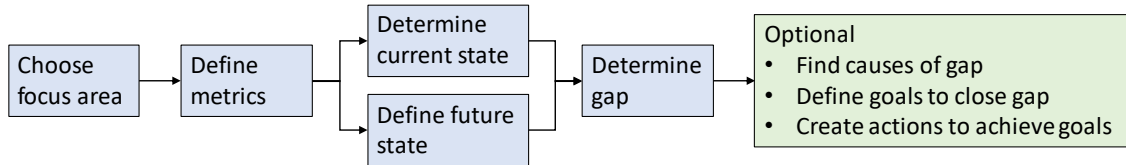
**Problem**  
How to determine needed improvements?

**Difficulty**  
Some training required

- **Gap Analysis** is used to compare where you are (current state) against where you want to be (future state).
- There is no standard **Gap Analysis** process, the process is tailored as needed.
- A gap is an improvement opportunity. Metrics, such as performance indicators, quantify the gap.
- Gap analyses is often used for: HR, performance (most common), product, and profit.

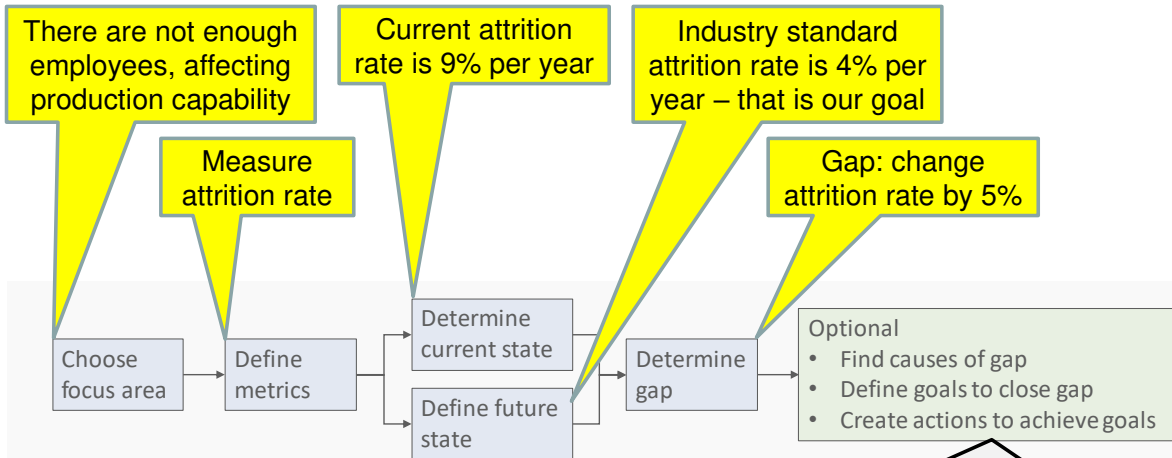


1. Select a specific problem area on which to focus.
2. Identify relevant metrics for the problem area.
3. Using those metrics, do the following (in either order):
  - A. Identify the desired future state
  - B. Use data to document the current state.
4. Compare the current and desired future states, this is the gap.
5. Sometimes a gap analysis includes gap closure steps:
  - A. Analyze the causes of the gap.
  - B. Create SMART goals to remove the gap.
  - C. Create action plans to achieve the SMART goals.



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## Gap Analysis – Example – Employee Attrition



1. **Gap Causes**
  - A. Benefit package is worse than industry average.
  - B. Less ability to work off-site than industry standard
  - C. ...
2. **Gap Closure Goals**
  - A. Within 2 months define changes to match industry standard benefit package and determine the cost.
  - B. ...
3. **Gap Closure Actions**
  - A. Form HR team to make recommendation, ...
  - B. ...

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# Getting Things Done (GTD)

## Problem

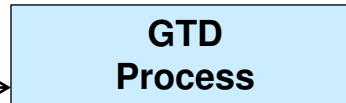
How to manage day-to-day activities?

## Difficulty

Easy to use

- **Getting Things Done (GTD)** is a time management and productivity system for individuals.
- GTD's process manages daily inputs, and their disposition, to avoid mental clutter and stress.
- GTD has general guidelines, but can be tailored as needed.

Daily demands for your time



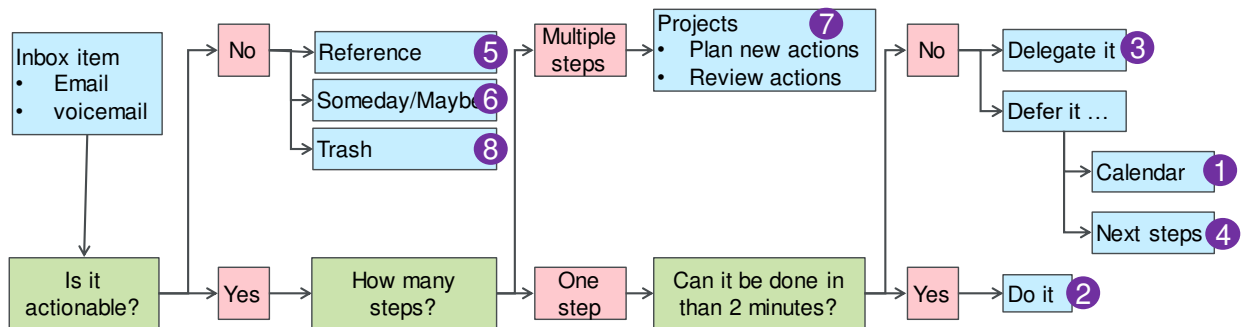
Managed information

GTD created the **2 minute rule**:  
If an activity will take less than two minutes, do it right away.

- 1. Capture everything:** Capture anything that you are involved with, large or small. Put these things in your inboxes. Update daily.
- 2. Clarify:** Convert every item in your inboxes into clear and concrete action steps. Determine the next step for each item; remove from inbox and ...
- 3. Organize:** Disposition each item into one of the lists:
  1. Calendar – holds appointments
  2. Complete action – in less than 2 minutes
  3. Delegate – when appropriate
  4. Next actions – tasks which are not project specific
  5. Reference – file away as needed
  6. Someday/Maybe list – low priority tasks
  7. Project task list – for items with more than 1 step, an item is given a defined action and a next step
  8. Trash – items no longer of importance
- 4. Review:** Frequently review, update, and revise your lists.
- 5. Engage:** Select activity to do next based on: context (e.g., home, office), energy level, priority, & time available

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## GTD – Example – Maintaining the 6in6 concept



**Managing daily inputs** (Note: most emails and texts are acknowledged)

1. Email (from local Quality meeting): Here's the date for your next 6in6 presentation [Put on calendar]
2. Voice mail (from colleague): Have Amazon print up 6in6 PDF file as a book, and send to me. [Do it]
3. Text (from colleague): There is a typo in a 6in6 presentation. [Delegate; send to 6in6 staff to fix]
4. Email (from 6in6 staff): Create template for 6in6 presentations. [Next steps. Put single action on list]
5. Email (from Google): Here is data on the number of 6in6 site visits. [Store for later]
6. Call (from 6 sigma friend): Can you create YouTube videos for each 6in6 topic? [Someday/Maybe]
7. Email (from 6in6 fans): Please create a 6in6 presentation on topic XXX [Project "new presentations": do background research within 2 weeks, follow-up with next production steps]
8. Email (from spammer): Special! Buy 3 tires and get 4<sup>th</sup> one free. [Trash]

### Daily activities

- A. Disposition input information (as shown above)
- B. Assess current state (e.g., energy level)
- C. Select next most important task based on current state and execute.
- D. Repeat.

### Weekly activities

- A. Review all lists
- B. Move items between lists and change priorities, as needed.

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# Hidden Factory

## Problem

How to identify waste due to unnecessary work?

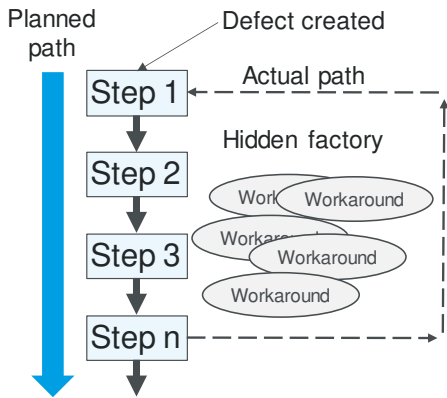
## Difficulty

Some training required

- A **Hidden Factory** is created when a defect flows downstream.
- The hidden factory represents process activities causing loss of: Availability, Efficiency, Schedule, Quality, or Performance.
- Visualization tools can help identify wastes caused by the “hidden factory.”

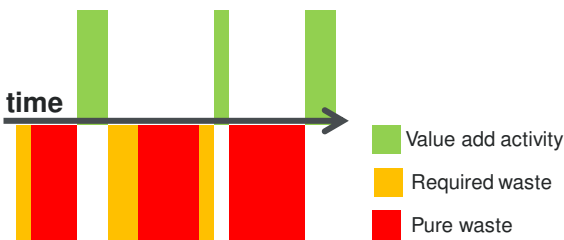


1. Assemble team
2. Scope the mapping effort
3. Choose an appropriate visualization tool, such as
  - Spaghetti diagram
  - Time value map
  - Process map
  - Swim lane diagram
  - Turtle diagram
  - ...
4. Map the process
5. Identify waste (and then remove it)



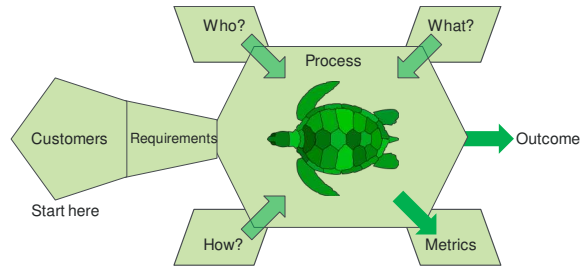
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# Hidden Factory – Example Mapping Techniques



**Time value map**

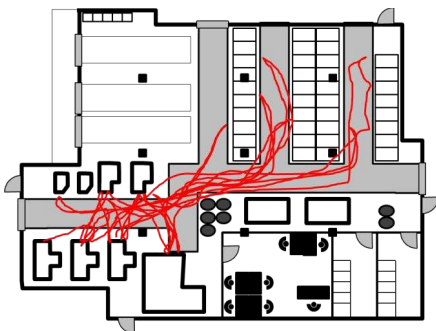
Shows non-value added activities with durations



**Turtle diagram**

Shows key activities

<https://creazilla.com/nodes/3164991-turtle-clipart>

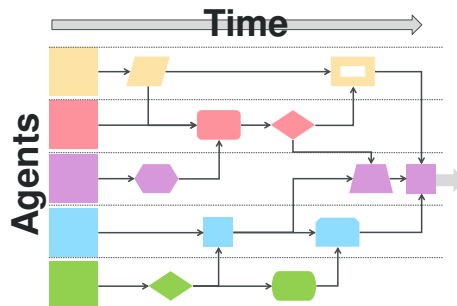


**Spaghetti diagram**

Shows unnecessary motion

<https://www.allaboutlean.com/wp-content/uploads/2015/06/Spaghetti-Diagram.png>

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**Swimlane diagram**

Shows who does what, when, and with what input

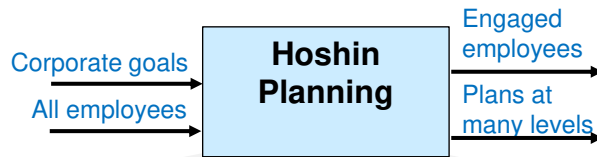
# Hoshin Planning (hoshin kanri)

**Problem**  
How to align employees with corporate goals?

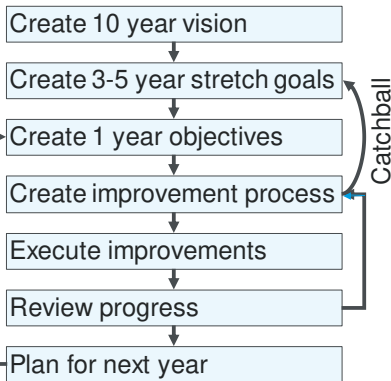
**Difficulty**

Work with an SME

- **Hoshin Planning** creates corporate goals, disseminates them to all, and creates plans to achieve them.
- **Catchball** is a part of Hoshin Planning in which ideas are passed between levels of an organization's hierarchy for feedback and action planning.



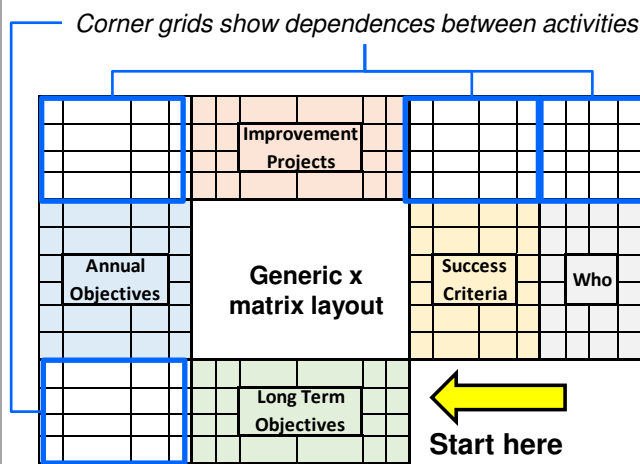
1. Create a 10-year vision.
2. Build 3 to 5-year stretch goals, no more than 5.
3. Create yearly objectives
4. Use catchball process to determine how to achieve the yearly objectives (e.g., determine resource demands) and create metrics. Communicate info to teams for execution.
5. Methodically execute the yearly objectives.
6. At appropriate intervals, review if the yearly objectives are being met and update as needed.
7. Analyze & update objectives for the next year.



- Benefits of Hoshin Planning**
1. Creates a strategy for continuous improvement.
  2. Aligns strategy with actions.
  3. Hoshin catchball engages the entire organization.
  4. Hoshin Planning provides structure & uniformity.

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## Hoshin Planning – Example – Improve Company

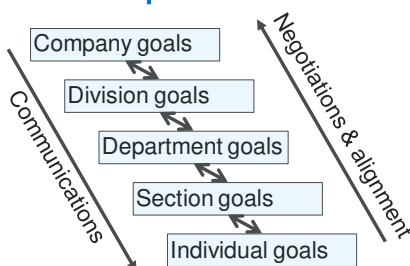


A hoshin kanri **x matrix**, also called a **policy deployment** (pd) document, includes “what,” “how,” “who,” and “how much.”

	X	Create new organic product lines		X	X	
X	X	Acquire competitors		X		X
(3) Improvement Projects						
Increase Company Valuation 5%	Increase Customers 10%	(2) Annual Goal	(4) Success Criteria	Acquire 2 Competitors		
				Add 3 Product Lines	Alice	Bob
(1) Long term goals						
X		Increase Company Valuation 15%				
X		Increase Customers 20%				

**Example: how to improve company**

### Catchball process



- In “catchball” objectives are passed, like a ball, from top-level management to every organizational level.
- Each level sends feedback and proposals up the management chain.

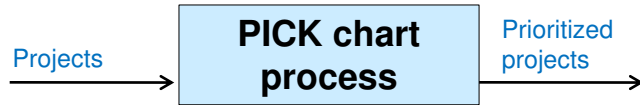
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# Impact–Effort matrix (PICK chart)

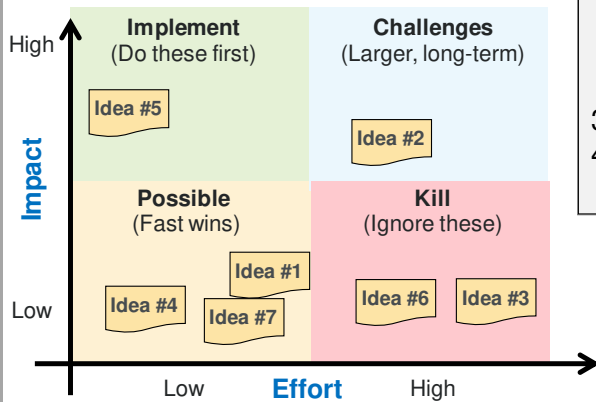
**Problem**  
How to choose among multiple alternatives?

**Difficulty**  
Easy to use

- An **impact-effort matrix**, or a **PICK** (Possible / Implement / Challenge / Kill) **chart**, is a way to categorize projects.
- A PICK chart prioritizes among many projects identifying those with the most value.



1. Create a list of improvement projects.
  - For example, use six sigma techniques.
2. Evaluate each improvement project in terms of “Payoff” and “Difficulty.”
  - Multivoting can be used for a quick analysis.
3. Create a PICK chart (see image to left).
4. From the PICK chart determine which projects should be pursued, and in what order.



An Impact/Effort matrix is also called an:

- Action/Priority matrix
- Ease/Benefit chart
- Ease/Impact chart

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## PICK chart – Example – 6in6 Awareness

*How to improve awareness of 6in6 presentations?*

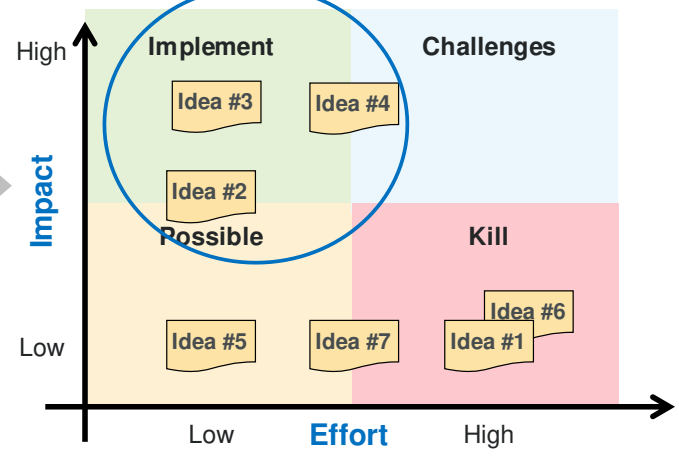
Idea	Improvement project	Effort	Impact
#1	Advertise on evening news	High (due to cost)	Low
✓ #2	Send email to Dan's friends	Low	Medium
✓ #3	Announce to 6 sigma groups on LinkedIn	Low	High
✓ #4	Place advertisement in 6 sigma journal	Medium	High
#5	Put sign on Dan's car	Low	Low
#6	Obtain celebrity endorsement	High (due to cost)	Low
#7	Put posters around town	Medium	Low

Evaluations of effort

Potential projects

Implement these

The above table yields the PICK chart shown



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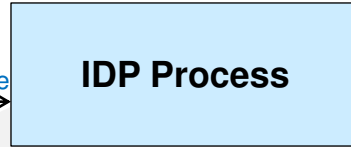
# Individual Development Plan (IDP)

**Problem**  
How to encourage employee growth?

**Difficulty**  
Some training required

- An **individual development plan (IDP)** helps employees improve their job performance and achieve their career goals.
- A company's tailored IDP template includes:
  - Professional goals
  - Strengths and talents
  - New skills to be obtained
  - How performance will be enhanced
  - An action plan
  - ...

- People-oriented manager
- Sharing employee



1. Create a company-wide IDP template
2. Obtain needed employee information
  - A. Manager gives employee the manager's IDP
  - B. Employee captures relevant information (perhaps via a questionnaire)
3. Create employee IDP
  - A. Manager and employee meet (maybe 1 hour)
  - B. They review: questionnaire information and recent performance reviews
  - C. They discuss: goals, passions, and skills
  - D. They document an individualized employee IDP (leveraging questionnaire info)



- [https://www.freepik.com/free-vector/businessman-businesswoman-talking-office\\_5712994.htm](https://www.freepik.com/free-vector/businessman-businesswoman-talking-office_5712994.htm)
- [https://commons.wikimedia.org/wiki/File:Cartoon\\_Man\\_Arriving\\_At\\_A\\_Career\\_Crossroad.svg](https://commons.wikimedia.org/wiki/File:Cartoon_Man_Arriving_At_A_Career_Crossroad.svg)

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## IDP – Example – Web Designer Advancement

Here's a completed IDP for a Web Designer

Employee name: **Pat Smith** Date: **10/15/20XX**  
 Position, title: **Artist level 3, web designer** Function: **maintain/update web site design**  
 What drives me: **(1) Clarity of communication (2) Every piece I create should be a work of art**  
 What I dislike: **"Cookie cutter" approaches, use of the color purple**  
 My skills: **<long list of items>**  
 My professional goals and aspirations

**Internal**  
 Mature my video creation skills, become leader in the field  
 Manage design of all print materials

**External**  
 Obtain peer recognition for my artistic business outreach  
 Win juried shows of my large stone carvings (> 20 kg)

What I do

- Never give up, always exceed expectations
- Work products are universally admired

What I could do (development opportunities)

- Influence the communication goals to which I now respond
- Have more latitude in how I create solutions

Action plan (specific steps/tasks to achieve goals)

**Short term (next 3 months)**  
 Practice creating video product solutions, at least 2 designs per project  
 Attend and observe bi-weekly business outreach discussions

**Long term (within 1 year):**  
 Learn the business' needs and contribute to business outreach discussions

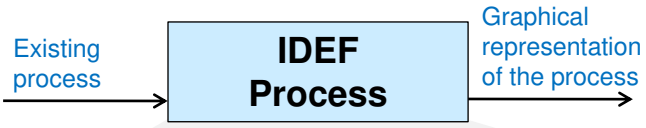
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# Integration Definition (IDEF)

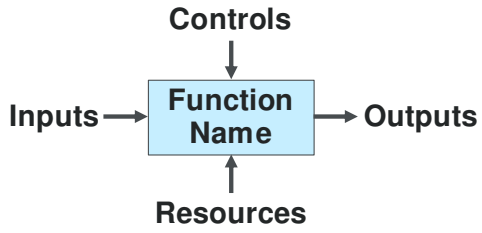
**Problem**  
How to graphically model a process?

**Difficulty**  
Some training required

- **Integration Definition (IDEF)** refers to a family of 16 modeling languages used in systems and software engineering; only some of them exist.
- **IDEF0** (for function modeling) is the most commonly used IDEF, it models the actions, activities, and decisions of a system.
- In IDEF diagrams each function (e.g., activity) is shown as a box. Box locations have specific roles: top (controls), left (inputs), right (outputs), and bottom (resources).

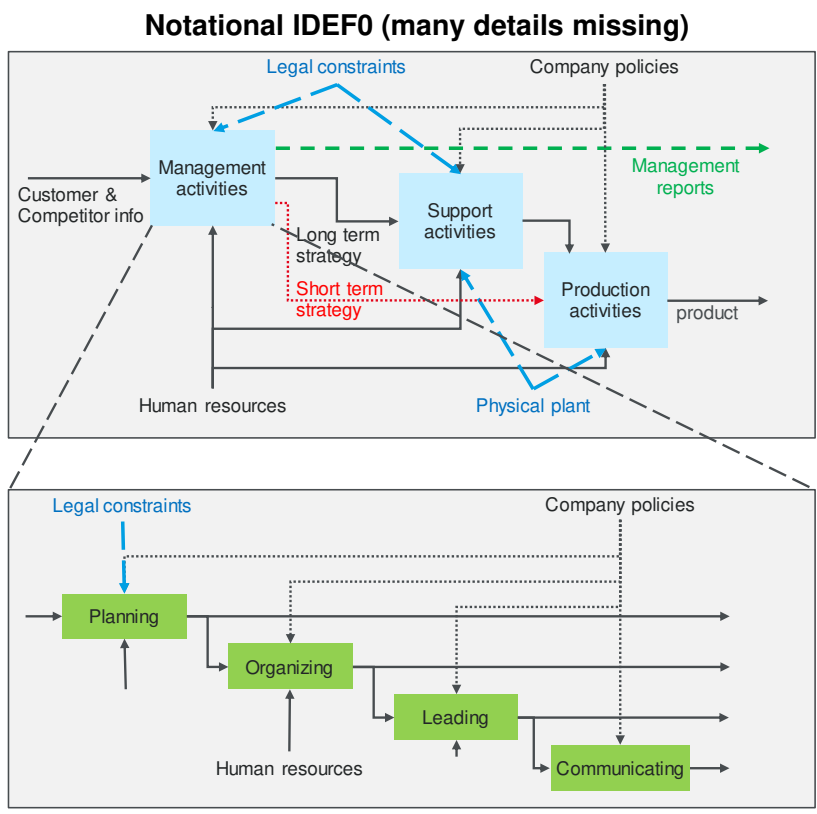
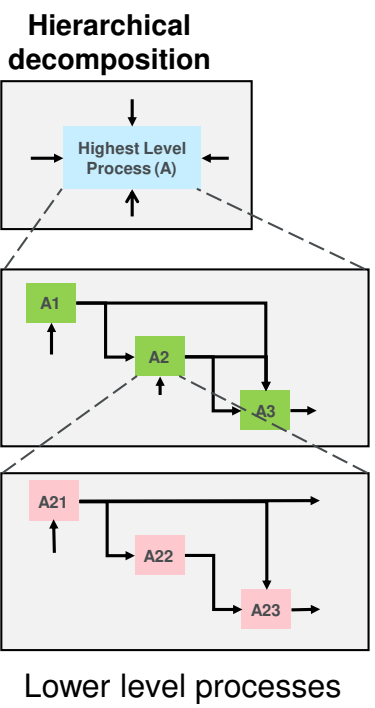


1. Select a process
2. Select a modeling language, one of:
  - IDEF0 Function modelling
  - IDEF1 Information modelling
    - IDEF1X Data modelling
  - IDEF2 Simulation model design
  - IDEF3 Process description capture
  - IDEF4 Object-oriented design
  - IDEF5 Ontology description capture
  - IDEF6 Design rationale capture
  - IDEF8 User interface modelling
  - IDEF9 Business constraint discovery
  - IDEF14 Network design
- Obtain a hierarchical collection of diagrams.
- Use the diagrams for analysis or simulation.



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## IDEF – Example – Manufacturing Company Process



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# Interrelationship Diagram (Network Diagram)

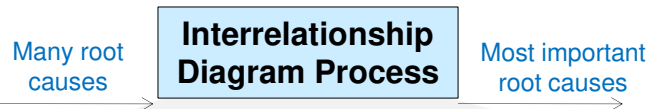
## Problem

How to determine the most important problem factors?

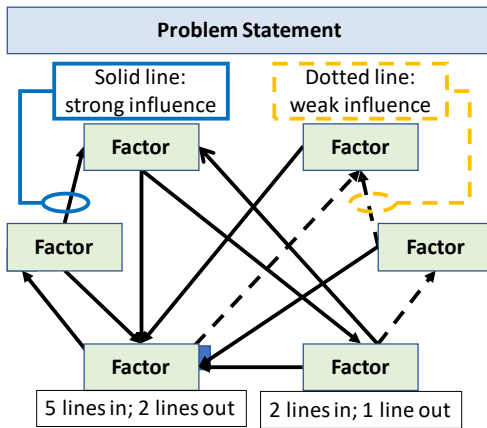
## Difficulty

Easy to use

- An **Interrelationship Diagram (ID)** shows the cause and effect relationship among different factors.
- The factors are connected by arrows, tail is a driver and head is an effect.
- An ID finds key factors by counting the number of in and out arrows.



1. Define the problem statement to explore.
2. Use brainstorming to identify the key factors (or root causes).
3. Lay out the diagram, with each key factor placed around a circle.
4. Put arrows on the diagram
  - For each pair of factors A and B, ask “Does A influence B?”. If “yes,” then draw an arrow from A to B (a solid arrow for strong influence, a dotted arrow for a weaker influence). Repeat for “Does B influence A?”.
5. Count the number of arrows going in to, and out of, each factor.
  - Optional: weight dotted arrows as ½.
6. The most important factors are the one with the most lines in or out.



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# Interrelationship Diagram – Example – Attrition

**Problem to address:** *Why are employees quitting?*

**Step 1:** “Employees are quitting”

**Step 2:**

- “Disagreements with manager”
- “Explore other job opportunities”
- “Limited growth opportunities”
- “Want less travel”
- “Want more salary”
- ... (for a realistic analysis, many more factors would be included)

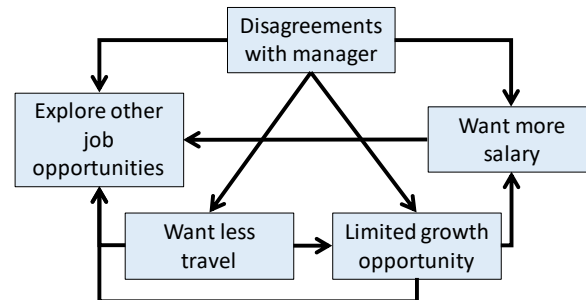
**Steps 3 & 4:** see figure (top)

**Step 5:** see figure (bottom)

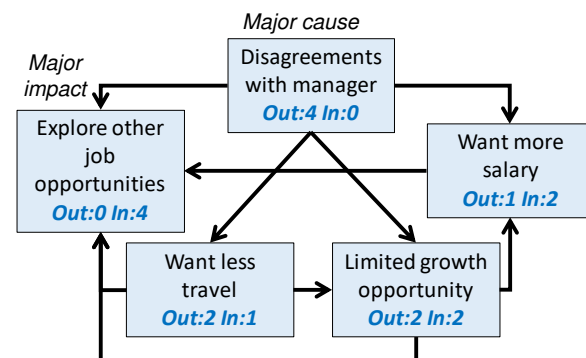
**Step 6:** Conclusions

• **Major cause (most out arrows):** “Disagreements with manager”

• **Major impact (most in arrows):** “Explore other job opportunities”



**Steps 3&4 (above), Step 5 (below)**



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# Kanban

## Problem

How to manage a process workflow?

## Difficulty

Some training required

- **Kanban** is a workflow management method to organize, manage, and improve processes.
- A **Kanban board** represents a workflow. Each column represents a task and each **Kanban card** represents a work item.
- A Kanban board is a real-time information repository and it identifies system bottlenecks
- Using WIP (work-in-progress) limits for tasks ensures only a manageable number of items are in progress at one time.
- Limiting WIP creates a “pull system.” This is like a grocery store whose shelves are only stocked as needed.

Existing process

## Kanban Process

A workflow visualization and management scheme

1. Ensure the business process is clearly defined, published, and socialized.
2. Design an appropriate Kanban board.
3. Perform the six Kanban practices while executing the business process:
  - A. Visualize the workflow
  - B. Limit work in progress (WIP)
  - C. Measure and manage flow
  - D. Make process policies explicit
  - E. Implement feedback loops
  - F. Improve collaboratively
4. Repeat from step 2

### The 4 Kanban principles

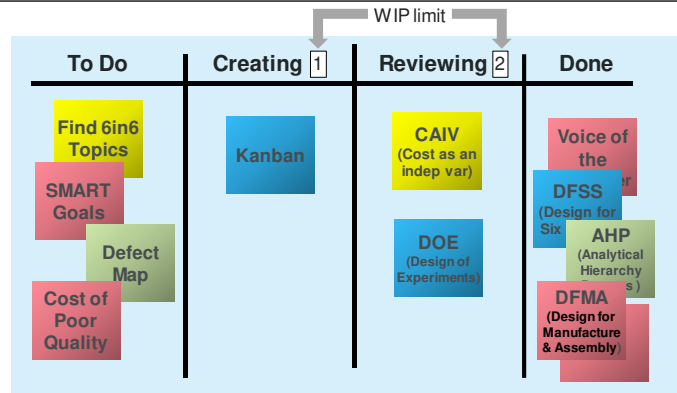
1. Start with what you do now
2. Agree to pursue incremental, evolutionary change
3. Respect the current process, roles, responsibilities, and titles
4. Encourage acts of leadership at all levels in your organization

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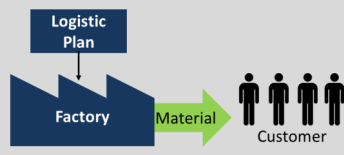
# Kanban – Example – Creating 6in6 Presentations

Tailored to 6in6 presentation creation, the Kanban board has 4 categories: (A) To Do / finding 6in6 topics, (B) creating draft 6in6 presentations (only 1 at a time), (C) reviewing and editing (up to 2) draft presentations, and (D) done.

- The first and last columns can contain any number of items.
- The WIP limits prevent there from being too many 6in6 presentations in-process.

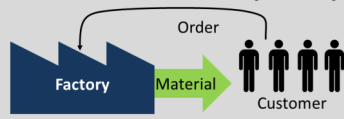


## Logistic Plan (Push?)



A push system uses a logistics plan to determine how much product to deliver – which may not reflect reality. A pull system only delivers what is needed.

## Information Flow (Pull?)



A Kanban card in a manufacturing environment, which represents a factory order, is at right.



<https://www.allaboutlean.com/push-pull/logistic-plan/>  
<https://commons.wikimedia.org/wiki/File:080527-F-0000A-001.JPG>

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# Kaizen

**Problem**  
How to improve a product or process?

**Difficulty**  
Work with an SME

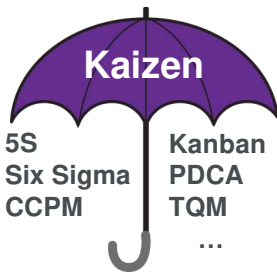
- **Kaizen** is a Japanese term meaning change for the better or continuous improvement.
- **Kaizen** can be implemented by many methods: 5S, Six Sigma, CCPM (Critical Chain Project Management), Kanban, PDCA (Plan / Do / Check / Act), TQM (total quality management), ...
- A **Kaizen event** or **blitz** is different, it creates a large change in a fixed time period.

- Teamwork
- Discipline
- Leadership



Improved product or process

1. Train and motivate employees.
2. Identify an improvement opportunity.
3. Explore new ideas, leveraging employee knowledge and experience.
4. Define an objective and decompose it into components (e.g., sub-objectives).
5. Plan the tasks for each sub-objective.
6. Execute the plan: monitor progress and test results
7. Start again at step 1.



<https://pixabay.com/vectors/umbrella-open-opened-handle-rain-891442/>

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## Kaizen – Example – Improve 6in6 web site

2. Every month look at some part of 6in6 to improve.
  - July 2023 → How to improve the “6in6 mission”?
3. Explore new ideas
  - Improve the 6in6 website distributing 6in6 info
4. Define objective
  - Update 6in6 website to current user expectations
5. Plan the tasks
  - Ask friend to critique 6in6 website
  - Hire GUI expert to critique 6in6 website
  - Implement changes
6. Execute the plan
  - Friend: “Why aren’t there YouTube videos?”
  - Hired GUI expert using upwork.com
  - Received report which included:
    - At the top: too much text
    - At the top: reinforce the word “free”
    - At the top: give an example deliverable
    - Make it look less like a blog
    - Didn’t like logo ...
  - Implemented most of the suggested changes
7. Repeat
  - Aug 2023 → How to make 6in6 info more useful?
    - Create “book version” with index ...

#	Six Sigma Tool Name	Acronym	Problem addressed	Problem type	Tool difficulty	6in6 documents
1	5 Whys / Root Cause Analysis		How to find a problem's root cause?	Analyzing/Troubleshooting	easy	PDF, PPT
2	5S Process of Lean	5S	How to remove distracting clutter?	Analyzing/Troubleshooting	easy	PDF, PPT

6in6 web page in June 2022

#	Six Sigma Tool Name	Acronym	Problem addressed	Problem type	Tool difficulty	6in6 presentations	Six Sigma Tool Name
1	5 Whys / Root Cause Analysis		How to find a problem's root cause?	Analyzing/Troubleshooting	easy to use	PDF, PPT, 5 Whys / Root Cause Analysis	
2	5S Process of Lean	5S	How to remove distracting clutter?	Choosing/Implementing	easy to use	PDF, PPT, 5S Process of Lean	

6in6 web page in January 2024

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# Key Performance Indicator (KPI)

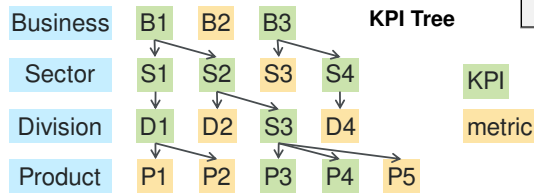
**Problem**  
How to assess performance?

**Difficulty**  
Some training required

- **Key performance indicators (KPIs)** are the vital few metrics assessing the success or failure of a project or product.
- KPIs can be quantitative or qualitative and can assess an outcome or a process.
- A KPI Tree is a graphical way to flow down and manage KPIs
- At each level: use 3-6 KPIs, use outcome & process KPIs, use KPIs that are meaningful, measurable, and manageable.

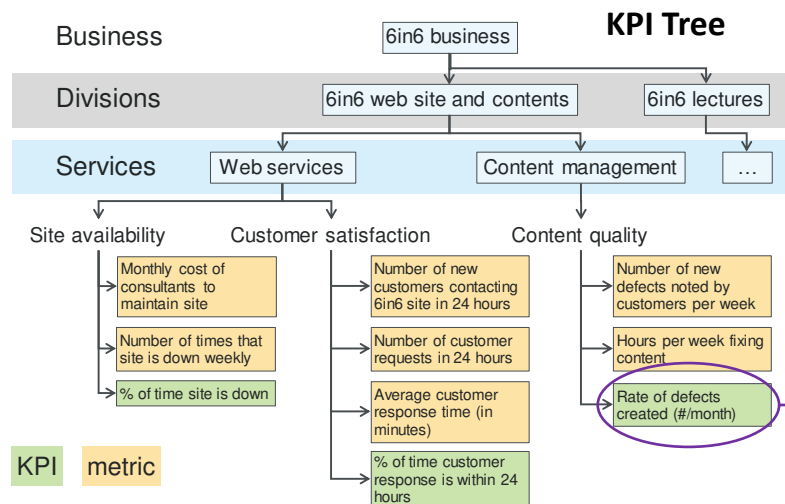


1. Determine the 2 to 5 key business objectives for your organization.
2. Determine metrics that assess these objectives.
3. Select the vital few metrics that are KPIs.
4. Create an operational definition (clear and detailed description) for each KPI.
5. Flow each KPI down to the next level and repeat the above process ... this creates a KPI tree.
6. Conduct periodic KPI reviews. For each KPI, decide to: keep, kill, or improve.



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## KPI – Example – 6in6 “business”



- Per usual, there are many metrics; most are not KPIs.
- Not shown are the metrics & KPIs at the business and division levels.

Performance Indicator	Division	Services
<i>Defect rate</i>	<i>web site and contents</i>	<i>Content management</i>
Description / Formula		
<i>Combine weekly defects found by Customer rep and Content rep to obtain monthly rate</i>		
Data Source		Process Diagram or Drawings
<i>Bob (Customer) &amp; Charlie (Content)</i>		
Frequency (When)	Decision Criteria	
<i>Monthly</i>	<i>Alert on value of 0.7</i>	
Data Collector (Who)	Owner	
<i>Betty (Quality)</i>	<i>Dan (President)</i>	
Baseline	Target	NA
<i>0.1</i>	<i>Below 0.5</i>	

KPI operational definition

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# Mind Mapping

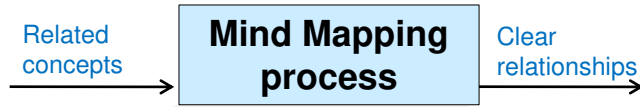
## Problem

How to add detail to a concept?

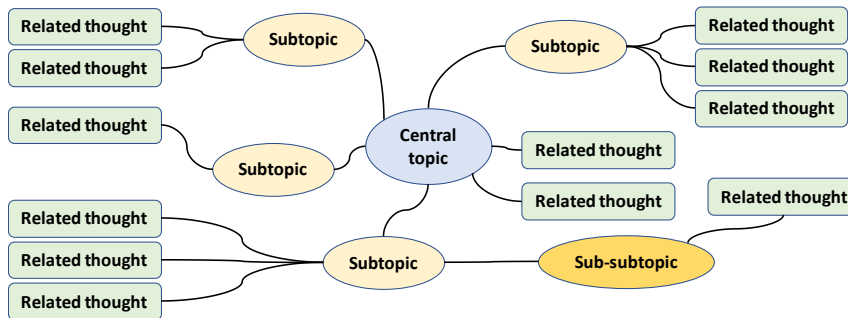
## Difficulty

Easy to use

- A **mind map** is a 1-page diagram containing words, ideas, tasks, or other items linked to and arranged around a central key word or idea.
- Mind maps are used to brainstorm, teach information, convey complex information, create an outline for a document, plan an activity, and much more.
- Many different tools can be used to create mind maps.



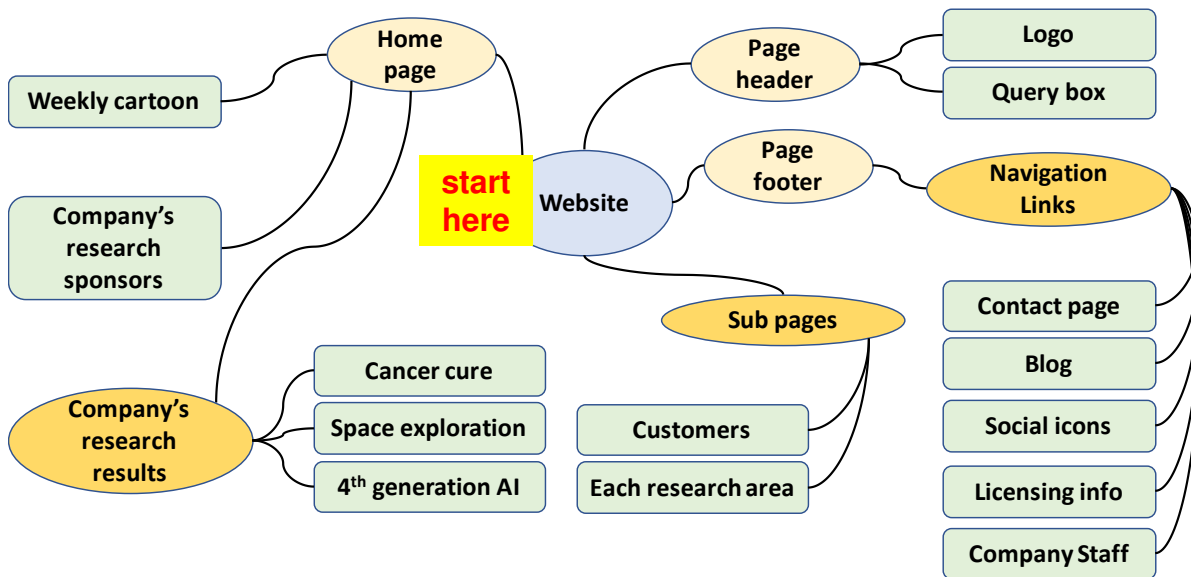
1. Start with a central topic and surround it by a bubble.
2. Recursively expand some of the bubbles by adding new related bubbles, and connecting them to indicate some type of relationship.



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# Mind Mapping – Example – Website Content

A Mind Map for conceptualizing the contents of a website



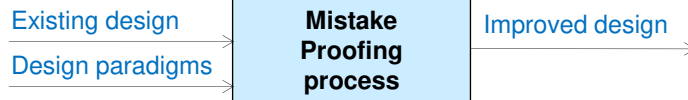
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# Mistake-Proofing / Error-Proofing (Poka-Yoke)

**Problem**  
How to mitigate potential mistakes?

**Difficulty**  
Some training required

- **Mistake-Proofing** is identifying and correcting problems as close to the source as possible.
- Mistake-Proofing is useful for maintenance, operations, production, and servicing.



<https://www.reliableplant.com/poka-yoke-31862>

- Implement the following principles** (as applicable)
1. **Eliminate** – remove task/part that allowed errors
  2. **Replace** – use a more reliable process
  3. **Prevent** – change task/part to make errors impossible
  4. **Facilitate** – make work easier to perform
  5. **Detect** – identify & resolve before further processing
  6. **Mitigate** – minimize the effects of errors

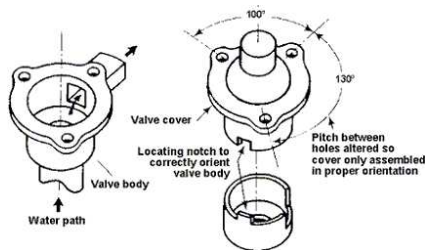
- Automobile examples**
- Unleaded gas tank opening
  - Gas cap tether preventing loss
  - Car doors lock at 18 mph
  - Car key cannot be removed unless car is in "park"

- Other Examples**
- Sink overflow outlet
  - Elevators don't shut doors on people
  - Dryer stops when door is opened
  - Opening a file drawer locks other drawers

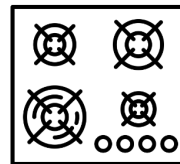
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## Mistake-Proofing – Examples

**Prevent** – Make parts as symmetric or as anti-symmetric as possible



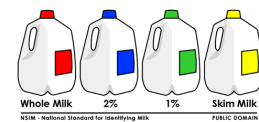
<https://www.npd-solutions.com/mistake.html>



**Facilitate** – Which dial turns on which stove burner?

<https://thenounproject.com/icon/stove-top-1474551/>

**Detect** – Milk containers can use color to indicate fat content



NSM - National Standard for Identifying Milk PUBLIC DOMAIN

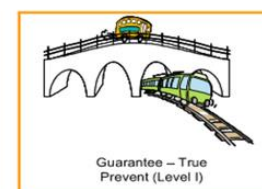
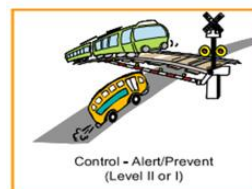
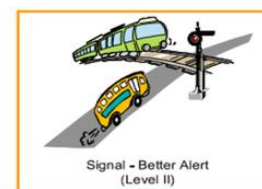
<http://www.aleanjourney.com/2011/05/changing-visual-standards-causes.html>

**Mitigate** – To insure cars will fit in a garage with a low clearance, use a go/no-go gauge at the entrance.



<https://www.parkinglotsafety.com/height-guard-clearance-bars.html>

**Prevent** – Different ways to avoid train/car collisions



<https://x.com/seanessee/status/633354935908888576>

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# Nominal Group Technique (NGT) / Multivoting

## Problem

How to crowd source a response to options?

## Difficulty

Easy to use

- **Nominal Group Technique** (also called **Multivoting**) uses a crowd's wisdom to quickly prioritize a list of items (e.g., problems or issues)
- Typically:
  - List has 10 or fewer items.
  - Each person gets 3-5 votes

- List of items
- Knowledgeable team

**Multivoting Process**

Prioritized items

Budget Priorities	
1 Attend more conferences	● ● ● ●
2 Hire a consultant	● ●
3 Hire more staff	● ● ● ● ●
4 New office equipment	
5 Upgrade computer SW	●

**Example:** 5 topics, 4 people (each with different colored dots), 3 votes/person

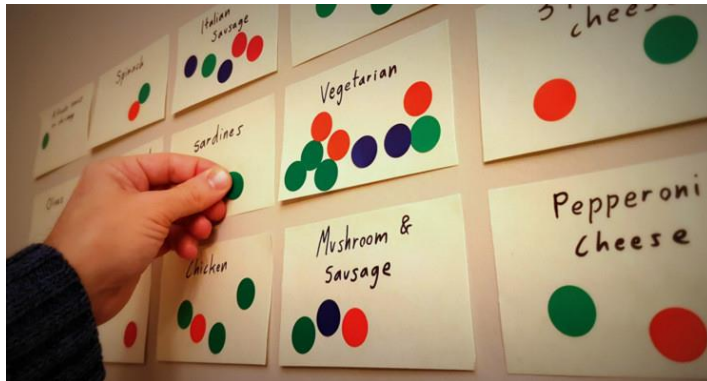
1. Create a list of items.
2. Every team member is given some number of "votes"
3. Each team member votes for the items they consider most important
  - They can spread their votes out or apply all their votes to a single item.
4. The total number of votes of each item becomes the priority ordering.
  - Have team discussion if there are unusual votes (e.g., one person puts all their votes on one item)

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# NGT – Examples

Figures (with permission)

- <https://dotmocracy.org/>
- <https://www.nngroup.com/articles/dot-voting/>



Here, a team is choosing what types of pizza to have for lunch. In this case, the number of dots may determine how many pizzas of each type to order.

A typical situation, a team's votes are on only a few of many alternatives. Here, with 12 items, only 4 items have any votes. The number of votes is {8, 6, 4, 2}. If only two projects are supported, then the projects with 8 and 6 votes are the ones to pursue.



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# Pareto Analysis

## Problem

How to identify the most important issues?

## Difficulty

Easy to use

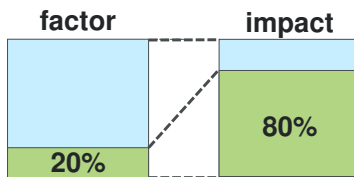
- A **Pareto Analysis** identifies the significant aspects of an issue.
- The **Pareto Principle** or the “80/20 rule” is: when several factors affect a situation, a few factors typically account for most of the impact.
  - “80% of the impact is explained by 20% of the factors”
- A **Pareto Diagram** has a bar graph (histogram) and a line graph (cumulative probability).

- List of issues
- Values for each issue

## Creating a Pareto Diagram

- List of the “critical few”

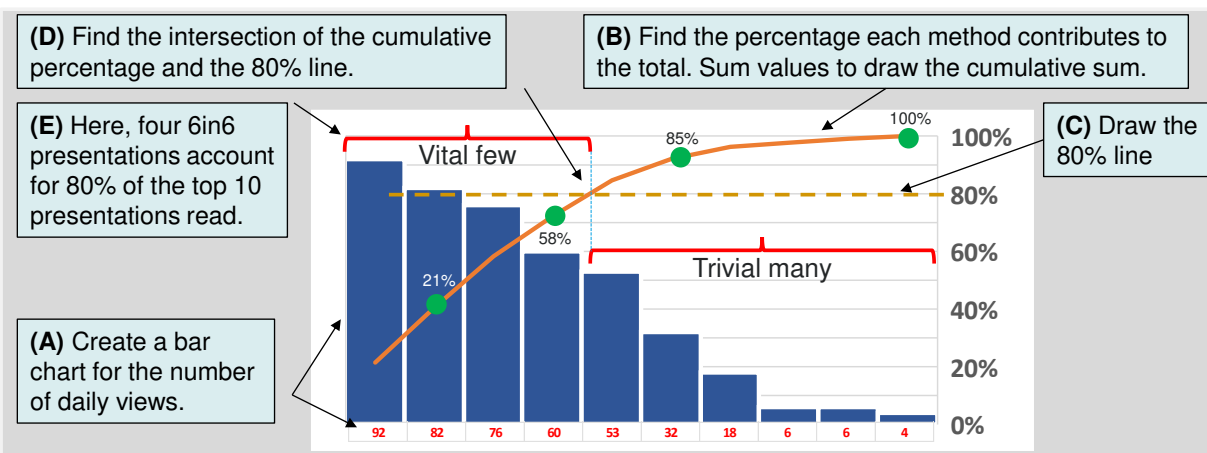
1. Creates a list of problems, items, or causes.
2. Decide how to evaluate each item on the list.
  - For example, by frequency, time, or cost.
3. Collect data on each item.
4. Find the total of the items’ values and use this to find the percentage each item contributes.
5. Create a vertical bar chart of the item’s values, and order from largest to smallest.
6. Overlay on the chart a plot of the cumulative percentage distribution of each item’s value.
7. Draw a line at the 80% cumulative percentage.
8. Identify the (likely) ~20% of the items that account for the 80% percentage.
9. These are the most important items, the “critical few,” that should be investigated.



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## Pareto Analysis – Example – 6in6 method readership

- The 6in6 team wants to review and update the “most important” 6in6 presentations.
- Which ones are the most important? We use the metric “number of daily views.”
- Yesterday, the most viewed 6in6 presentations were “QFD” and FMEA” (with 92 and 82 views). The number of views for the top 10 were {92, 82, 76, 60, 53, 32, 18, 6, 6, 4}.
- Use a Pareto Chart to determine how many of these to review. Follow the letters below:



- In this case there are 4 “vital few” 6in6 presentations (among the top 10) to review and update.

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# PEST Analysis

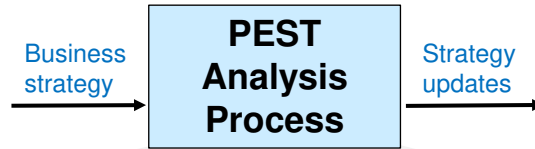
## Problem

How to use external factors to update business strategy?

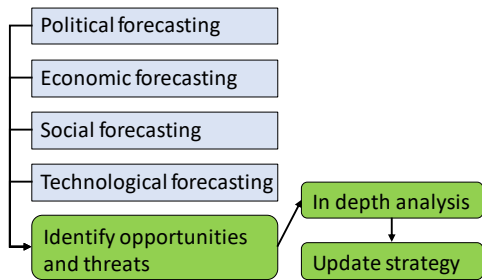
## Difficulty

Some training required

- **PEST** (Political, Economic, Social and Technological) **Analysis** determines the influence of external factors on an organization.
- A PEST analysis is an input to the strategic planning process. (Changes in external factors can create opportunities or threats.)
- PEST is used (with SWOT) to evaluate the pros/cons of a project.



1. Determine relevant factors within PEST categories:
  - A. Political → political stability, taxation and economic policies, trade agreements, ...
  - B. Economic → economic trends, GDP, interest rate, tax rate, unemployment rate, ...
  - C. Social → cultural and religious factors, demographic factors, religious factors, ...
  - D. Technological → effects of technology on: distribution, manufacturing, marketing, ...
2. For each factor, do the following:
  - A. Identify potential opportunities and/or threats.
  - B. Identify sources of information for that factor.
  - C. Prepare a questionnaire for that factor.
  - D. Collect detailed data for that factor.
3. Analyze the collected data.
4. Take appropriate actions, as necessary.



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# PEST – Example – Fast Food Chain

## Sample Template

	Factors	Potential opportunity and/or threat	Information sources	Questionnaire: questions & data collection plan	Data obtained	Conclusions	Strategy actions
<b>Political</b>	A, B, ...	A=threat, B=opportunity, ...	citations	Ask X and Y about Z	know K	L is likely	Prevent P
<b>Economic</b>	...						
<b>Social</b>							
<b>Technological</b>							



## Example: Fast food chain (e.g., McDonald's, Burger King) in other countries

### 1. Political Factors

- Must abide by (changing?) tax rules; product contents depend on import taxes.
- Must abide by (changing?) labeling requirements; product contents depends on which information appears on label.

### 2. Economic Factors

- Need to anticipate (changing?) supply chain capabilities, to adjust product contents.
- Need to anticipate (changing?) buying power of consumers, to adjust prices.

### 3. Social Factors

- Need to anticipate (changing?) fast food health concerns; to adjust products and offerings.
- Need to anticipate (changing?) behaviors (workers at home no longer drive past restaurants).

### 4. Technological Factors

- Need to anticipate (changing?) customer desires to pay via mobile app.
- Need to anticipate (changing?) customer desire to order on web site, and pick up food in store.

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# Process Capability metrics (Cp and Cpk)

**Problem**  
How to statistically assess a process?

**Difficulty**

Work with an SME

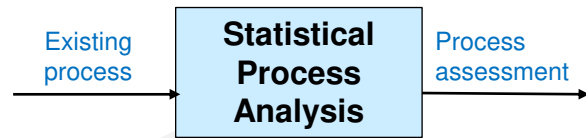
- **Process capability** is a statistical assessment of whether or not a process is *capable* and/or *centered*. You want both.
- Consider a car entering a garage:
  - *capable* ( $Cp > 1$ ) means the car usually arrives at the same location,
  - *centered* ( $Cpk > 1$ ) means the car enters the center of the garage.

### Formulae

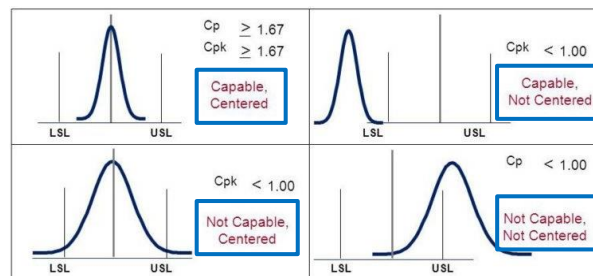
$$Cp = (USL - LSL) / (6 * s)$$

$$Cpk = \text{minimum}((USL - m) / (3 * s), (m - LSL) / (3 * s))$$

- **Cp = Process Capability** = the number of times the spread of the process fits into the tolerance width. Larger values are better.
- **Cpk = Process Capability corrected for position**. Larger values are better.
- **USL & LSL** – Customer's Upper & Lower Specification Limits
- **m** = process mean
- **s** = process standard deviation



1. Obtain customer specs (USL & LSL)
2. Determine the process' sample mean (m) and standard deviation (s)
3. Compute the Cp and Cpk metrics
4. Interpret the metrics



<https://www.latestquality.com/how-to-calculate-cp-and-cpk/>

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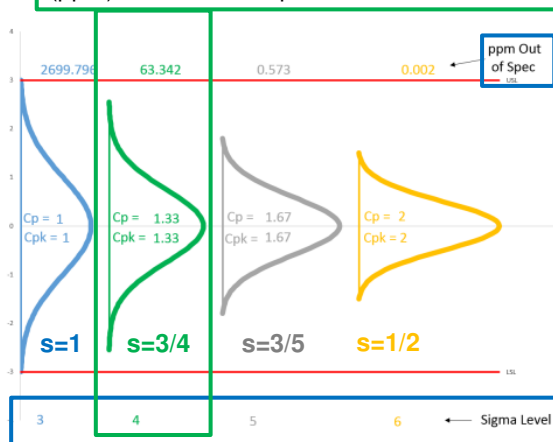
# Process Capability metrics – Example

### Consider the following case

- m = average = 0
- s = standard deviation = as specified below
- LSL = Lower Specification Limit = - 3
- USL = Upper Specification Limit = 3

Decreasing variance → fewer parts out of spec

**Interpretation:** if  $s=3/4$  then, at a 4 sigma level,  $Cp=CPK=1.33$ , and 63 parts per million (ppm) will be out of spec

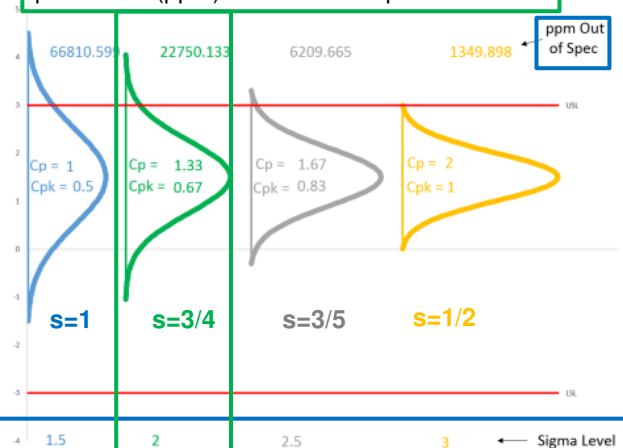


### Change the example to have

- m = average = 1.5

Note: a capable process ( $Cp > 1.0$ ) does not ensure that a product is within specifications.

**Interpretation:** if  $s=3/4$  then, at a 2 sigma level,  $Cp=1.33$ ,  $CPK=0.67$ , and 22,750 parts per million (ppm) will be out of spec



<https://www.spcforexcel.com/knowledge/process-capability/interactive-look-process-capability>

Specified six sigma level

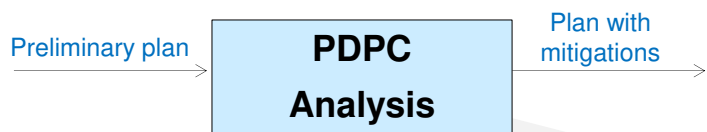
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# Process Decision Program Chart (PDPC)

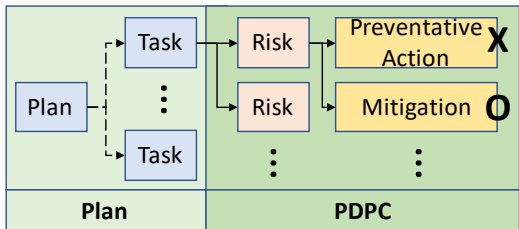
**Problem**  
How to anticipate and mitigate potential problems?

**Difficulty**  
Easy to use

- A **Process Decision Program Chart (PDPC)** is a risk identification and mitigation tool.
- PDPC starts with a tree diagram representation of a program plan and systematically identifies risks by asking what-if questions.
- Using PDPC, you can revise the plan or prepared mitigations.

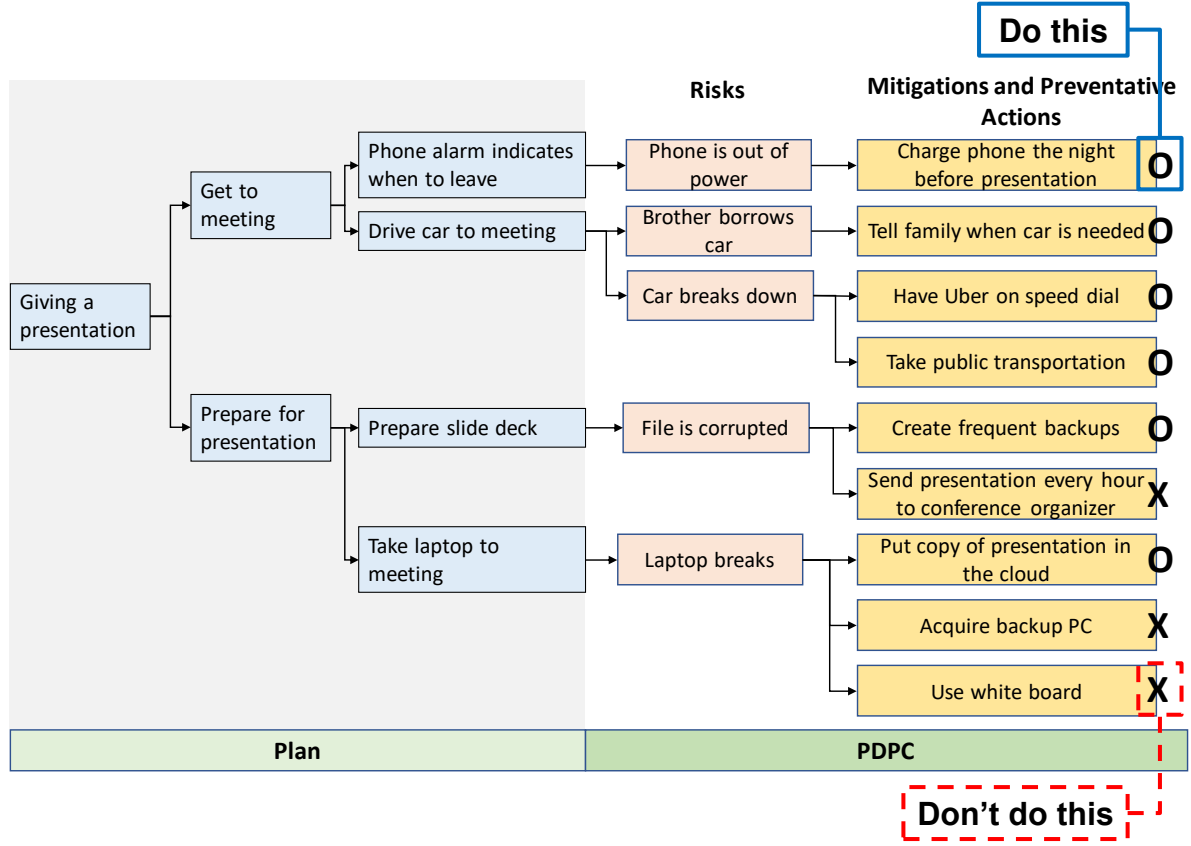


1. Create a tree diagram for a program plan.
  - Do not make it overly complex.
  - Perhaps, 3 layers to the task level.
2. For each task, identify what can go wrong using brainstorming. Address, perhaps:
  - How could this task fail?
  - Are the assumptions reasonable?
  - Is there margin for error?
3. Add each identified risk to the tree.
4. For each identified risk, brainstorm mitigations and preventative actions.
5. Add each of them to the tree.
6. Evaluate each of them:
  - How easily can it be implemented?
  - How effective is it?
 Label each with an "O" if it is practical, or with an "X" if it is not.



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## PDPC – Example – Giving a 6in6 presentation



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# Project Charter

## Problem

How to create a project charter?

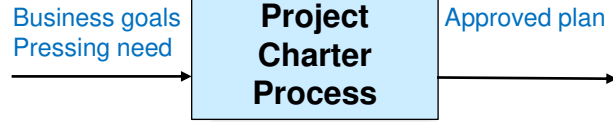
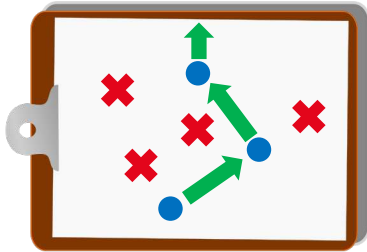
## Difficulty

Easy to use

- Every project begins with a **Project Charter**.
- A **Project Charter** defines a project's objectives, scope, and resources.
- There is no standard **Project Charter** format. Each company, and each application area, creates their own.

### Benefits of a Project Charter

- Aligns team members
- Improves team communications
- Manages expectations
- Prevents scope creep
- Provides a framework for decisions
- Secures project resources



The following defines the needed elements:

1. Create **Name** and **Description**
2. Define **Purpose** and **Justification**
3. Create **Objectives** and **Scope**
4. Identify **Stakeholders**
5. Define **Deliverables**
6. Identify **Team** and **Roles**
7. Create **Schedule** and **Budget**
8. Identify **Risks** and **Opportunities**
9. Document **Assumptions**
10. Obtain project **Approval**

Then distribute the document to stakeholders and team.

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## Project Charter – Example – Create 6in6 presentations

Sometimes, to avoid expending effort on unfunded projects, it may be useful to create a project charter in stages, obtaining approval to proceed at each stage.

PROJECT CHARTER					
Review #1	Project Name	Add statistical tools to 6in6 presentations		Project Sponsor	Alice
	Project Start	2Q 2024	Project End	3Q 2024	Project Manager
"Could be good, tell me more"	<b>Business need (Why should we do this now?)</b>				
	Have created 6in6 presentations on nearly all major 6 sigma topics, except statistical tools.				
	<b>Alignment with business (Why is this part of the overall business model?)</b>				
Review #2	Comprehensiveness goal necessitates that all major categories of 6 sigma tools be included.				
	<b>Project Scope</b>		<b>Project Deliverables</b>		
	In scope	1. SW supported tools (e.g., Excel, Matlab) 2. Tools that are elementary or require minimal training		6in6 presentations on 5 different tools	
	Out of scope	Tools requiring SME help			
Review #3	<b>Risks and opportunities</b>		<b>Assumptions</b>		
	Risks	May delay updating other 6in6 presentations		1. There is demand for these tools	
	Opportunities	May get students to help		2. Work will take less than 2 months	
	<b>Resource requirements</b>				
	Cost	\$5K	Team	Cathy (Research), David (Create), Edward (Review)	
<b>Milestones</b>		<b>Target completion date</b>	<b>Actual date</b>		
Presentation #1		start + 4 weeks			
Presentations #2 & #3		start + 6 weeks			
Presentations #4 & #5		start + 8 weeks			
<b>Approval</b>		Alice Smith (President) 15 April 2024			
Start project					

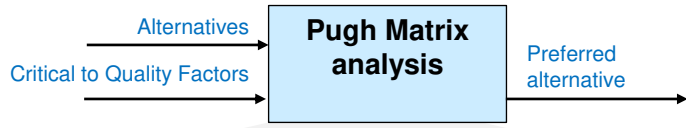
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# Pugh Matrix

**Problem**  
How to choose among multiple alternatives?

**Difficulty**  
Some training required

- The **Pugh Matrix** is a simple technique for making a decision among multiple alternatives.
- The **Pugh Matrix** uses pairwise comparisons between the alternatives, for each defined criteria or requirement.
- The most time-consuming part of using a **Pugh Matrix** is creating the selection criteria.
  - The assessments are quick and the calculation is easy.



- Process**
- Choose the alternatives to be compared
    - List them along the top of the matrix.
  - Define the multiple selection criteria
    - These are the “Critical to Quality” (CTQ) factors.
    - They might come from the Voice of the Customer (VOC).
    - List them along the left side of the matrix.
    - Optionally, define weights for each CTQ (adding up to 1).
  - Define one of the alternatives as the **Reference Design**.
  - Have a team assign values for each alternative for each CTQ:
    - Compare each alternative to the Reference Design.
    - Assign one of the following values:
      - 0: alternative is comparable to the reference design
      - +1: alternative is better than the reference design
      - 1: alternative is worse than the reference design.
  - Calculate the score for each alternative, by adding the values.
    - Optionally, weight each  $\{-1,0,1\}$  by that CTQ’s weight.

		Alternatives				
		Alternative A (Reference Design)	Alternative B	Alternative C	Alternative D	
Criteria	Criteria 1	0	-1	-1	1	
	Criteria 2	0	0	1	1	
	Criteria 3	0	-1	-1	1	
	Criteria 4	0	1	0	0	
	Criteria 5	0	-1	0	-1	
Total Score		0	-2	-1	2	

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## Pugh Matrix – Example – Buying a car

		Alternatives					Criteria weights
		Nissan Ariya	Volkswagen ID4	Chevrolet Bolt	Tesla Roadster	Mercedes-Benz EQC	
Criteria	Price	0	0	-1	1	-1	0.2
	Color choice	0	0	0	-1	0	0.1
	Small size	0	1	0	1	-1	0.1
	Maximum speed	0	1	0	1	1	0.1
	Nearby dealership	0	1	1	-1	1	0.2
	Distance on one charge	0	1	0	-1	1	0.3
Total Score		0	4	0	0	1	
Total Score (weighted)		0	0.7	0	-0.2	0.3	

(3) Weighted case: each criteria has a weight

(1) Reference Design

(2) Team created comparison values

(4) Computation when not using weights is a column sum:  
 $1 = (-1) + (0) + (-1) + (1) + (1) + (1)$

(5) Computation using weights is an inner product:  
 $0.3 = 0.2*(-1) + 0.1(0) + 0.1*(-1) + 0.1*(1) + 0.2*(1) + 0.3*(1)$

(6) Best alternatives

- Weighted: 4 is highest value
- Unweighted: 0.7 is highest value

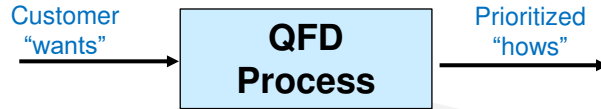
# Qualify Function Deployment (QFD)

**Problem**  
How to select "how's" to meet a "want"?

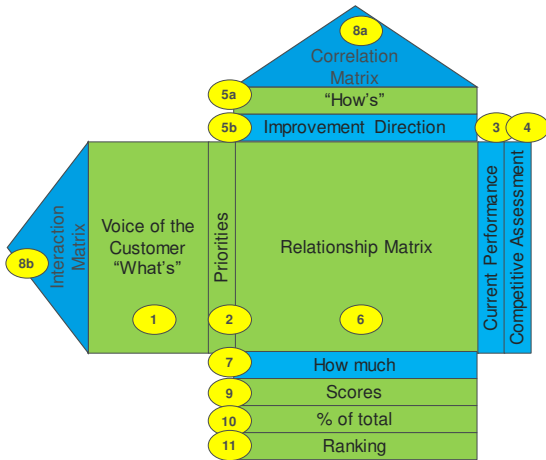
**Difficulty**  
Some training required

**Quality Function Deployment (QFD)** translates a customer's "wants" ("What does the customer want?") into "hows" ("How can we satisfy the customer wants?").

- A weighted decision matrix is used.
- The "hows" are prioritized



- Process**
1. Determine the customer's "What's"
  2. Determine the customer's priority ratings
  3. *Determine current performance*
  4. *Determine competitive assessment*
  5. Define the "How's"
  6. Determine how well a "How" meets a "What"
  7. *Establish Measurable Targets for "How's"*
  8. *Complete Correlation and Interaction Matrices*
  9. Compute the Score for each "How"
  10. Compute percentages and rankings
  11. Determine the final result



The green elements are the minimal elements for a QFD. The blue elements are optional.

**Minimal**  
**Optional**

QFD is also known as the "house of quality"

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## QFD – Example – Selecting a vacation

### Minimal QFD process steps

1. Determine the customer's "What's"
2. Determine the customer's priority ratings
3. Define the "How's"
5. Determine how well a "How" meets a "What"
6. Compute the Score for each "How"
9. Compute percentages and rankings
10. Determine the final result

### Example: selecting a vacation

- What's** (items of concern): cost, child friendly, novelty
- How's**: go to the beach, go skiing, go to Disneyland, travel internationally, day trips from home

- For steps 2 and 5, use values of {1,3,9} for simplicity
- For step 6, a large score is preferred to a smaller score

**2:** desire low cost and very child friendly ... overall a larger number is a better choice

Customer "what's"	Priority	Hows				
		beach	skiing	Disneyland	travel	day trips
Cost	1	9	3	1	1	9
Child friendly	9	9	3	9	1	3
Novelty	3	1	3	3	9	1
<b>Scores</b>		93	39	91	37	39
<b>% of total</b>		31%	13%	30%	12%	13%
<b>Ranking</b>		1	3	2	5	3

**1:** what the customer cares about

**3:** These are the different possible "how's"

**5:** for cost: travel is expensive (bad) so it is a "1", the beach is inexpensive (good) so it is a "9" ... a larger number is a better choice

**6:** these are the mathematical "inner product" of each "how" with the priorities. For example:  $93 = 1 \cdot 9 + 9 \cdot 9 + 3 \cdot 1$ . The total of the scores is 299.

**9:** These are the scores divided by 299

**10:** This row has ranked the "% of total" values. Overall "beach" and "Disneyland" are close and a more detailed analysis of these two "hows" should be made.

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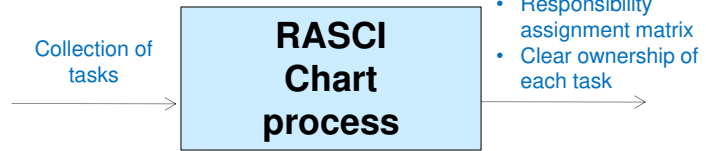
# RASCI (Responsible / Accountable / Support / Consulted / Informed) Chart

**Problem**  
How to represent task roles?

**Difficulty**

Easy to use

- **RASCI** is a tool to determine *Roles and Responsibilities* for tasks.
- Using RASCI every person in a task has a well-defined role.
- The “Accountable” person is key!
  - Every activity/task has only one “A”
  - From the outside, the “A” person is the single point of contact for a specific task.



1. Identify all activities/tasks (these are rows)
2. Identify all the roles/players (these are columns)
3. Identify who has R, A, S, C, I for each activity/task
4. Resolve gaps/overlaps with the team

Role	Meaning
<b>R = Responsible</b>	Those who perform the work to complete a task.
<b>A = Accountable</b>	The person with task ownership.
<b>I = Informed</b>	Those who are kept up-to-date on a task (e.g., progress).
<b>C = Consulted</b>	Those who supply input to a task.
<b>S = Support</b>	Those tasked to support those Responsible for the task.

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[https://commons.wikimedia.org/wiki/File:RACI\\_MATRIX\\_PPT\\_TEMPLATE.jpg](https://commons.wikimedia.org/wiki/File:RACI_MATRIX_PPT_TEMPLATE.jpg)

## RASCI – Example – Creating a 6in6 presentation

	Creating a 6in6 presentation	Dan	Alice	Bob	Cathy	David	Elizabeth	Frank
<i>main task</i>	Entire process	A, R						
<i>subtask 6</i>	Update internet	I		A	R			
<i>subtask 5</i>	Final review	I		R		A	R	
<i>subtask 4</i>	Create document	A	R	I		I	I	C
<i>subtask 3</i>	Define key information	I		A, R				C
<i>subtask 2</i>	Research information	I	A, R	I		C		
<i>subtask 1</i>	Choose topic	A, R	I				C	C

Role
R = Responsible
A = Accountable
I = Informed
C = Consulted
S = Support

### Notes

1. To create a new 6in6 presentation, several subtasks need to be performed (read bottom-up).
2. A single person may have multiple roles.
3. There is only one “A” each task/row (the accountable person)
4. There is at least one “R” for each task/row (the responsible person/people)
5. Color coding the {R,A,S,C,I} can make a RASCI chart easier to review.
6. From the RASCI chart, we can infer that
  - Dan is in charge
  - Alice owns the research activities
  - Cathy owns the internet activities
  - David owns the editorial activities
  - Frank is a resource used by many
7. Everyone knows what their role is for each part of the 6in6 presentation creation process.

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# Reverse Brainstorming

**Problem**  
How to identify ideas to solve a problem?

**Difficulty**

Easy to use

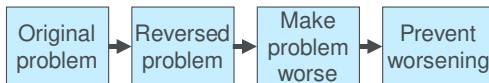
- Instead of directly solving a problem, **reverse brainstorming** reverses the problem to focus on causes of the original problem or how to achieve the opposite of what is desired.
- The ideas for the reverse problem, which worsen the original problem, are analyzed to determine how to solve the original problem.

Problem statement

**Reverse Brainstorming Process**

Problem improvements

1. Clearly identify the problem to be solved.
2. Reverse the problem statement in one of two ways
  - A. Instead of "How do I solve this problem?" create the reverse problem "How could I cause the problem?"
  - B. Instead of "How do I achieve these results?" create the reverse problem "How could I achieve the opposite results?"
3. Brainstorm answers to solve the reverse problem (do not reject any ideas).
4. For each of the reverse problem ideas, attempt to find solutions to the original problem.
5. Prioritize the solutions to the original problem.



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## Reverse Brainstorming – Example – Web Site Visits

- **Problem:** How to have more visitors to the 6in6 website ([www.sixsigmainsixminutes.com](http://www.sixsigmainsixminutes.com))?
- **Reverse problem:** How to drive visitors away from the 6in6 web site?

### Potential solutions to the reverse problem

1. Have a lengthy software license that users must agree to.
2. Put in many paid advertisements that take up much screen real estate.
3. Required a complicated log-in procedure with a required long password.
4. Have dead links that do not go anywhere.
5. Host the website on a very slow server.
6. Use many distracting features like flashing text and moving figures.
7. Make the web site hard to read (confusing text, small text, difficult to read fonts)
8. Make it difficult to find desired content.



### Potential solutions to the original problem

1. Have no required software license.
2. Have no advertisements.
3. Do not require users to log in.
4. Confirm that all the links work.
5. Use the fastest affordable server.
6. Adopt UX (user experience) best practices; remove distractions.
7. Use simple language and large easy-to-read fonts.
8. Use a simple navigation paradigm.

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# Reverse Planning (AKA backward design)

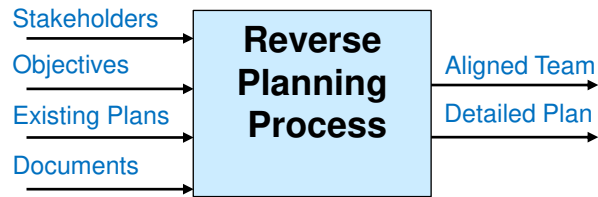
**Problem**  
How to create a plan to reach a goal?

**Difficulty**  
Some training required

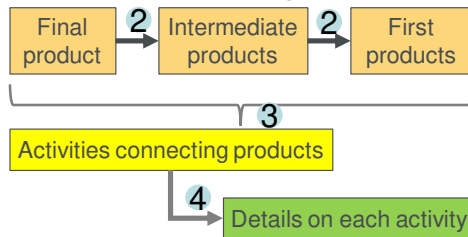
**Reverse Planning** is a high energy team-building approach to develop schedules based on network logic.

**When should I use it? When ...**

- determining needed activities
- building a schedule
- creating a detailed plan to support an existing schedule



## Reverse Planning Process

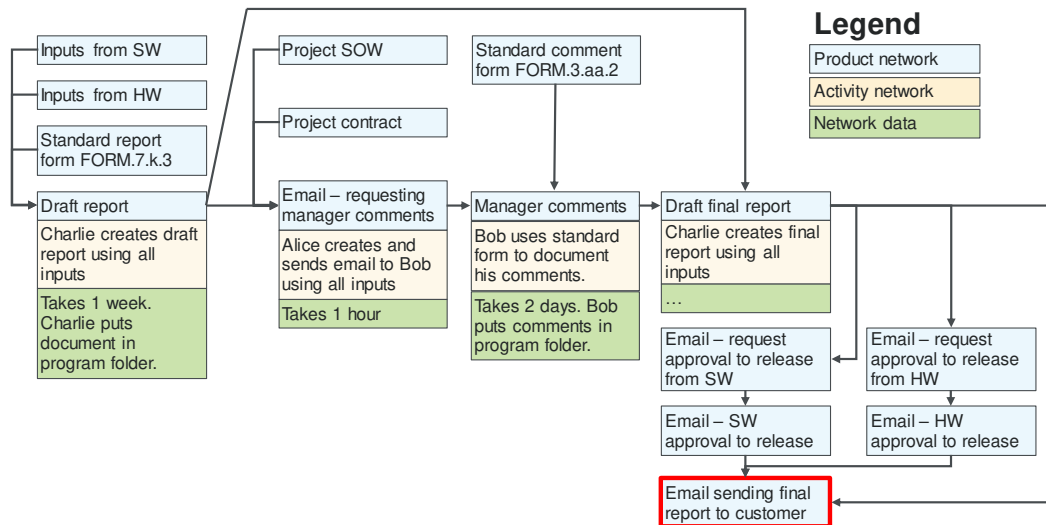


Tangible products = "something you can hold in your hand" = {emails, designs, reports, approvals, manufactured items, ...}

1. Identify the **end objective**
2. Define the **Product Network**
  - Determine the tangible products required, starting with the last; define dependencies between them
3. Define the **Activity Network**
  - Determine the activities necessary to create the products; define their dependencies
4. Populate the **Network Data**
  - For each activity, define its duration, needed resources, and the definition of "Done"
5. Review and **optimize** the network

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# Reverse Planning – Example – Sending out a report



1. This flow chart was created right to left, starting with the desired final result (box with red border).
2. First, the blue boxes were created; each of them is a "thing" (noun), something you can hold in your hand.
3. Second, a few of the needed yellow boxes were defined; they define "who" does "what" to create what is in the blue boxes.
4. Finally, the sender and receiver of each blue box (defined in the yellow box) negotiate the timeline, the inputs and outputs, and where the documents will be placed (this information is in the green boxes).
5. It takes much work to create a complete flowchart. However, when complete, it is clear to everyone what the process is, how long it will take, and who is responsible for what activities.

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# Risk Analysis & Management

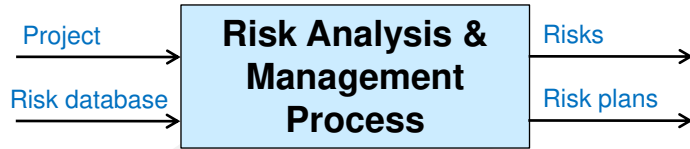
## Problem

How to address project risk?

## Difficulty

Easy to use

- A **Risk Analysis** determines and prioritizes risks. A risk is something that can delay, halt, or harm your project.
- **Risk Management** is how risks are dealt with.
- There are many risk classes, each with many types of risk.
- Maintaining a generic & project risk database is a best practice



1. **Identify** the risks using assumptions, historical documents, interviews, meetings, and risk database.
2. **Score** risks. Refine high- and medium-scoring risks. Include impacts on quality, time, and cost. Use either
  - **Risk Prioritization Grid**: severity, likelihood
  - **FMEA**: severity, likelihood, observability
3. Plan **responses**:
  - **Accept** the risk: can tolerate, if needed
  - **Avoid** the risk: eliminate it from happening
  - **Reduce** the risk: use mitigation plans
  - **Share** the risk: offload risk to other party
4. **Execute**: Address the high-scoring risks; address the medium-scoring risks, as possible.

Risk Likelihood	Risk severity				
	1 Very Low	2 Low	3 Medium	4 High	5 Very high
1 Very Low	Medium	Medium	High	High	High
2 Low	Medium	Medium	Medium	High	High
3 Medium	Low	Medium	Medium	High	High
4 High	Low	Low	Medium	Medium	High
5 Very high	Low	Low	Low	Medium	Medium

Risk Prioritization Grid

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## Risk Analysis – Example – 6in6 Project Risks

### List of risks and their evaluation

#	Risk type	Risk	Likelihood	Severity	Overall risk
1	Audience	Someone copies all the 6in6 presentations to their own site	1 Very Low	2 Low	Low
2	Audience	Few people view 6in6 presentations	3 Medium	3 Medium	Medium
3	Delivery	6in6 website fails since ISP provider goes out of business	1 Very Low	3 Medium	Low
4	Delivery	6in6 website fails since too many people view 6in6 presentations and system crashes	1 Very Low	3 Medium	Low
5	Motivation	No new 6in6 presentations are created since Dan wins lottery	1 Very Low	1 Very Low	Low
6	Motivation	Few new 6in6 presentations are created since Dan moves on to other interests	2 Low	1 Very Low	Low
7	Production	There are factual errors in a 6in6 presentation	2 Low	5 Very high	High
8	Production	There are grammatical/spelling errors in a 6in6 presentation	3 Medium	1 Very Low	Low

Optional info for each risk:

- Cost
- Duration
- Point of contact
- Date recognized
- Mitigations
- Contingent actions

### Map risk numbers to a risk prioritization grid

Risk Likelihood	Risk severity				
	1 Very Low	2 Low	3 Medium	4 High	5 Very high
5 Very high					
4 High					
3 Medium	8		2		
2 Low	6				7
1 Very Low	5	1	3, 4		

Address all high level risks

### Risk #7 strategies:

- **Prevention**: Have experienced 6 sigma practitioner review new presentations.
- **Mitigation**: Respond immediately to audience recognition of an error.

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# SCAMPER

## Problem

How to create an improved product or process?

## Difficulty

Easy to use

**SCAMPER** is an acronym for 7 ways in which an improved or new product or process can be created, based on an existing product or process.

- **S**ubstitute / **C**ombine / **A**dapt / **M**odify / **P**ut to other uses / **E**liminate / **R**earrange (or **R**everse)

Existing product or process

**SCAMPER Process**

Improved or new product or process

1. Identify and review an existing product or process.
2. Investigate the 7 ways in which a new or improved product or process can be created from an existing one.
  - For each, ask probing questions that are likely to elicit useful responses (see example below).
  - While some generated ideas may not work, the goal is to generate as many ideas as possible.
3. Evaluate the responses that were created.

		Example
<b>S</b>	<b>Substitute</b>	Replace a product/process component with another component that works better
		A child's book made from cloth, not paper
<b>C</b>	<b>Combine</b>	Put different components together to improve a product/process
		Vanilla Coca-Cola
<b>A</b>	<b>Adapt</b>	Change the nature of a product/process by incorporating other ideas
		Use a bank card as a credit card
<b>M</b>	<b>Modify</b>	Change how a product/process looks or acts.
		Accept soft copies (electronic) copies in addition to hard (paper) copies.
<b>P</b>	<b>Put to other uses</b>	Use the product/process for a purpose for which it was not designed.
		Use existing distribution capability for one product to distribute another product.
<b>E</b>	<b>Eliminate</b>	Remove parts that don't add any, or much, value.
		Remove wire to obtain a wireless mouse
<b>R</b>	<b>Rearrange / Reverse</b>	Consider the effect of if part of the product/process was done in a different order.
		At a fast food restaurant, pre-cook a hamburger before a customer orders it.

## Possible **Combine** questions:

- Can multiple process steps be performed by the same person at the same time?
- Can we combine steps 1&2 or 2&3 or 3&4 and ...?
- Can we combine job functions?
- Can we combine customer needs from different business areas?

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## SCAMPER – Example – Fast Food Chain

McDonald's incorporates many practices which, in retrospect, could have arisen from a SCAMPER analysis of earlier/traditional restaurants:

### Substitute

- Use a franchise model instead of having a restaurant run by McDonald's direct employees. (This substitutes people who work for the franchise owner for McDonald's employees.)

### Combine

- Create and sell food combinations ("meals") instead of individual products.
- Combine taking food away from a restaurant concept with a seated restaurant concept, to obtain the drive-thru concept.

### Adapt

- As other restaurants have done, offer free items with some purchases (e.g., a drink with each burger).
- Accept payment using a contactless payment system on mobile devices (e.g., Apple Pay).

### Modify

- Allow the user to customize the contents of their order (a hamburger with no onions)
- Have the customer pay for the food before eating.

### Put to another use

- Have franchisees rent land from McDonald's, so they make money on the food and the real estate.

### Eliminate

- Allow customers to order food on a phone app, or kiosk, eliminating the need for a cashier.
- Let customers select napkins and straws to eliminate having an employee supply them.

### Reverse

- Instead of preparing food after a customer order, pre-cook food to speed up delivery to the customer.
- Instead of having the customer enter a McDonald's, have an employee deliver food to a car.

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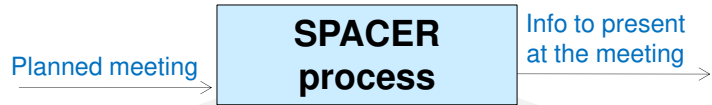
# SPACER

**Problem**  
How to run a meeting?

**Difficulty**

Easy to use

- **SPACER** is an acronym for information to present at the start of a meeting (see below).
- Using SPACER allows a meeting to stay focused, and prevents the meeting from getting detoured
  - by mistake (e.g., going down a rabbit hole); or
  - by intent (e.g., an attendee wants to hijack the meeting)



1. Prepare the SPACER content before a meeting, see table below.
2. At the start of that meeting, review – and update as needed – the SPACER content with the team.
  - Optionally, but recommended: allow team to negotiate the code of conduct
3. Continue the meeting, staying focused on the meeting agenda.

	Addresses
<b>S Safety</b>	What to do in an emergency?
<b>P Purpose</b>	Why are we having the meeting?
<b>A Agenda</b>	What will we do during the meeting?
<b>C Conduct</b>	How will we act during the meeting?
<b>E Expectations</b>	What will be the result of the meeting?
<b>R Roles &amp; Responsibilities</b>	Who will do what?

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## SPACER – Example – Starting a Meeting

Opening statement at the beginning of a meeting:

**Thank you for coming to today's 6in6 meeting.**

<b>S Safety</b>	If the fire alarm goes off, the closest emergency exit is out the door and to the right about 50 feet. There a staircase down to an outside door and the rally point is clearly indicated. Note that the rest rooms are to the left when leaving this room, about 30 feet away.
<b>P Purpose</b>	Today's meeting is to discuss how to get more people aware of the 6in6 presentations that are on the web.
<b>A Agenda</b>	Here is our agenda, which was included in the meeting invite: (* Discuss the brainstormed ideas from the last meeting. (* Prioritize the ideas based on cost and impact. (* Discuss ways to implement the top two ideas.
<b>C Conduct</b>	I'd like to propose the following meeting rules: (* Listen to each other with respect (* No cell phones or pagers (* "Vegas Rules" -- what occurs during the meeting stays in the meeting Are these acceptable? What else should we add?
<b>E Expectations</b>	The expectation is that at the end of the meeting we have draft implementation plans. These plans will be firmed up then reviewed by finance to determine implementation costs, and reviewed by a focus group to determine likelihood of success.
<b>R Roles &amp; Responsibilities</b>	Alice will moderate the overall meeting. Bob will lead the discussion of the brainstormed ideas and their prioritization. Charles will lead the implementation discussion. After the meeting, Diane will take the information produced and firm it up; hence, the meeting -- which might take up to 2 hours -- is not over until Diane is satisfied with the information produced.

**Are there any questions before we begin?**

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# Stakeholder Analysis

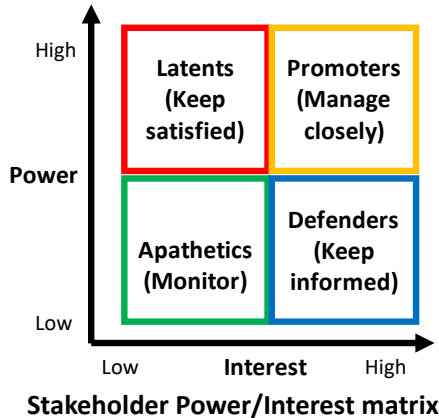
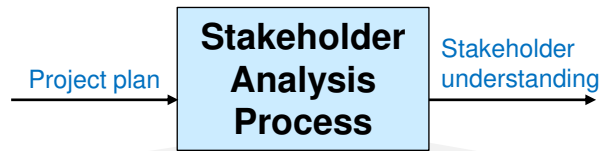
## Problem

How to obtain stakeholder alignment?

## Difficulty

Some training required

- Project success requires that each stakeholder be handled properly.
- A **stakeholder analysis** is a precursor to creating a project communications plan.
- There are many tools for assessing and categorizing stakeholders.



1. Identify the stakeholders (internal and external, anyone with a stake in the product).
2. Create a **Power/Interest matrix**: Determine each stakeholder's project interest (will they support?) and their power (can they affect resources?)
3. Create a **Stakeholder Scoring matrix**: Score the stakeholders (1=unaware, ..., 5=leading)
4. Develop a strategy supporting the needs of each stakeholder, leading to a successful project.

Stakeholder Scoring matrix

Stakeholder name	Current Rating	Desired Rating	Rating Rationale	Action Plan

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# Stakeholder Analysis – Example – Generic

(1) List of stakeholders (first list functions, then identify individuals within each function)

Category	Internal Stakeholders	External Stakeholders
Design	Graphic designer	End users
Development	Developers	--
Documentation	Technical writers	End users
Review	Management	Auditors
Sales	Sales department	Potential customers
Testing	Testing team	Beta users
...		

(2) Stakeholder Power/Interest matrix

	Power	Interest	Type
Alice in marketing	low	high	Defender
Bob in customer support	high	low	Latent
Charles in accounting	low	low	Apathetic
...			

- Actions
- Communication strategies

(3) Stakeholder Scoring Matrix

- Ratings used**
1. Unaware
  2. Resistant
  3. Neutral
  4. Supportive
  5. Leading

Stakeholder name	Current Rating	Desired Rating	Rating Rationale	Action Plan
Alice in marketing	5	5	She brought idea to company, wants success	None required
Bob in customer support	2	4	Thinks department is already overloaded	(*) Have external company create support materials (*) Encourage and support efficiency improvement projects in customer support
Charles in accounting	3	3	Has no opinion	None required
...				

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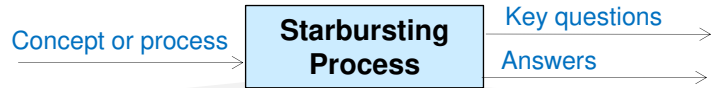
# Starburst brainstorming

**Problem**  
How to create brainstorming questions?

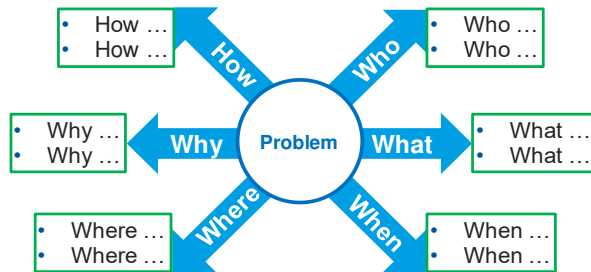
**Difficulty**

Easy to use

- **Starburst Brainstorming** is a type of structured brainstorming that focuses on creating key questions before finding the answers.
- The process uses a six-point starburst diagram, the points of the star are *who, what, when, where, why, and how*.
- The facilitator manages the process and addresses off-track (but useful) questions.



1. Construct a **six-pointed star**
  - A. Put the concept, process, problem, product or service in the center of the star.
  - B. Add the five 'W's and the 'H' at the star's points.
2. For each of the six star points, **create questions** for the word at that star point and write them down
  - A. Do not attempt to answer questions immediately.
  - B. Continue brainstorming until there are at least 3 questions for each of the six points of the star,
3. Systematically **address each question**.

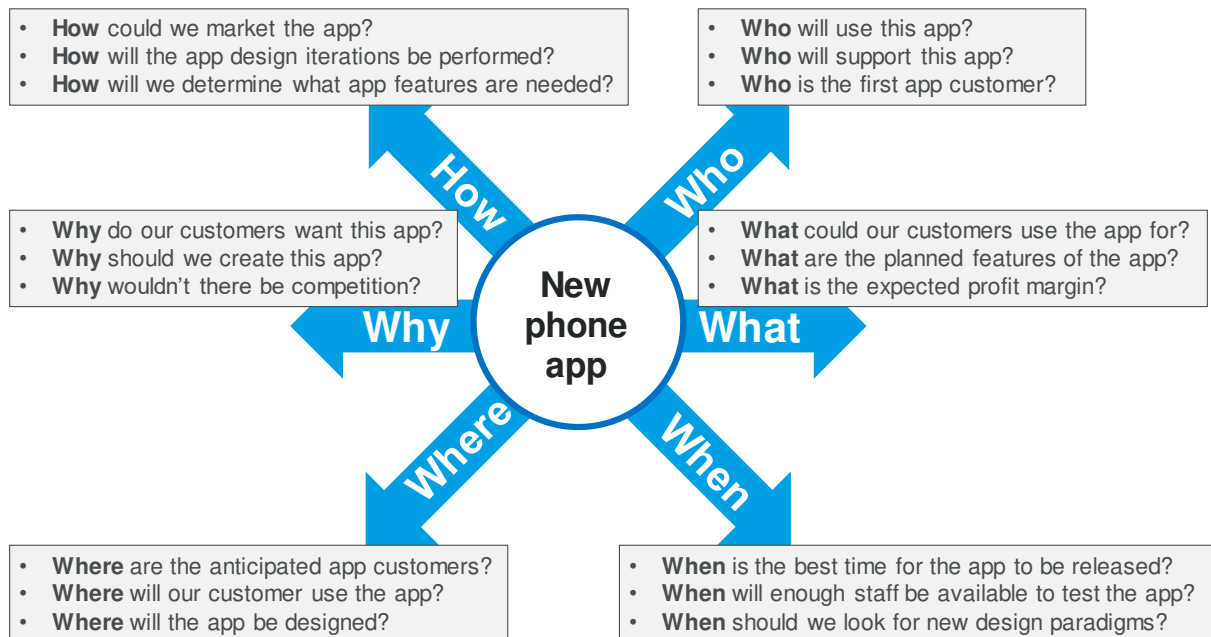


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## Starburst brainstorming – Example – Phone App

Suppose your company is creating a new phone application. The resulting Starburst might look as follows.

- *There are 6 collections of questions.*
- *Each collection has at least 3 questions.*



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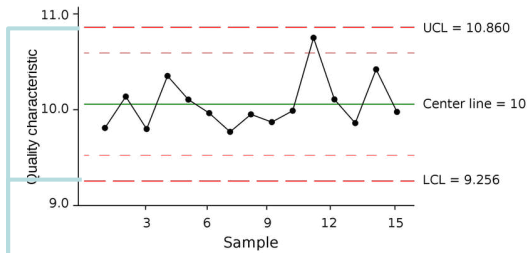
# Statistical Process Control (SPC)

**Problem**  
How to ensure process quality?

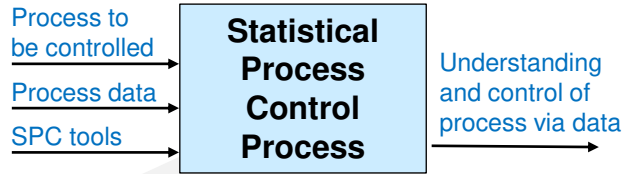
**Difficulty**

Work with an SME

- **Statistical Process Control (SPC)** is the application of statistical methods to the monitoring & control of a process to ensure that it produces conforming products
- **SPC** involves collecting data, controlling a process through data charting and analysis, and understanding process capability.



**Upper/Lower Control limits**  
(not customer specification limits)



1. Define the **objectives** for a specific process
2. **Plan** data collection points
3. **Plan** data analysis method
4. **Understand** & improve measurement system (see 6in6 on Gage R&R)
5. **Collect & review** data
6. Calculate control limits
7. **Monitor** & correct process based on data collected (see 6in6 on Control Charts)
8. Determine **process capability** (Cp and Cpk, see 6in6 on Process Capability)
9. Iterate process

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## Statistical Process Control (SPC) – Examples

There are many ways to

- Calculate control limits
- Monitor & correct process via collected data

The “Western Electric rules,” which are only useful for hand analysis, are below.

### Western Electric process

- **Step 0** – find the process' sample mean ( $m$ ) and standard deviation ( $s$ )
- **Step 1** – create symmetric control limits, using  $\pm 3s$
- **Step 2** – define 3 “zones”
  - Zone C  $\rightarrow$  region within 1s of  $m$
  - Zone B  $\rightarrow$  region between 1s and 2s of  $m$
  - Zone A  $\rightarrow$  region between 2s and 3s of  $m$
- **Step 3** – plot new data points as they arrive and look for certain patterns that may indicate a process is not in control. Some of these patterns are shown below.

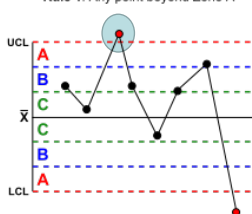
For discrete defect data, the different control charts are p, np, u, and c.

		Interest	
		Defects	Defectives
Sample size	constant	c-chart	np-chart
	variable	u-chart	p-chart

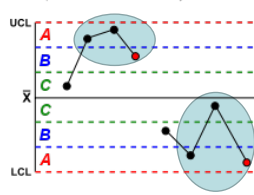
Many other rules have been described:

- There are **8 “Nelson rules”**  
[https://en.wikipedia.org/wiki/Nelson\\_rules](https://en.wikipedia.org/wiki/Nelson_rules)
- There are **6 “Westgard rules”**  
[https://en.wikipedia.org/wiki/Westgard\\_rules](https://en.wikipedia.org/wiki/Westgard_rules)
- There are **6 “Western Electric rules”** for data analysis using a range (R) chart – different from an ( $m,s$ ) chart.  
[https://en.wikipedia.org/wiki/Western\\_Electric\\_rules](https://en.wikipedia.org/wiki/Western_Electric_rules)

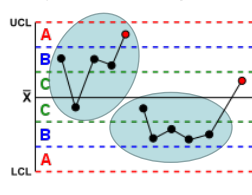
Rule 1: Any point beyond Zone A



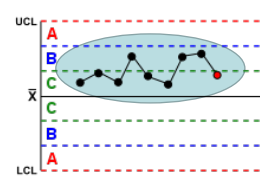
Rule 2: two out of three consecutive points fall Zone A or beyond



Rule 3: Four out of five consecutive points fall Zone B or beyond



Rule 4: Nine consecutive points on the same side of center line (mean)



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[https://en.wikipedia.org/wiki/Western\\_Electric\\_rules](https://en.wikipedia.org/wiki/Western_Electric_rules)

# SWOT (Strength / Weaknesses / Opportunities / Threats)

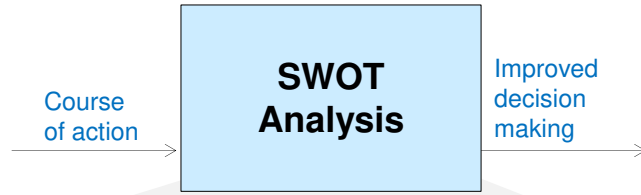
## Problem

How to assess a project or organization?

## Difficulty

Easy to use

- A **SWOT** analysis is a structured strategic method to evaluate an organization or a project.
- SWOT documents the anticipated **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats.



	Help you	Hurt you
Internal	<b>S</b> Strengths	<b>W</b> Weaknesses
External	<b>O</b> Opportunities	<b>T</b> Threats

1. Clearly specify the desired end state or objective.
2. Identify the internal and external factors that are favorable and unfavorable to achieve that objective. For each SWOT element, address a set of "standard" questions:
  - **Strengths:** *What do you do very well, compared to others? What resources do you have? Is your brand strong?*
  - **Weaknesses:** *What do your rivals do better than you do? What processes and activities need improvement? What do you do poorly?*
  - **Opportunities:** *Are there new ways to create your products? Where are your strengths valued? Are there new markets? Are your competitors' customers unhappy?*
  - **Threats:** *Will technology change the need for your product? Can customers use alternative products? Are customers needs changing? What are your competitors doing?*

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## SWOT – Example – Fast Food Chain

A SWOT analysis for a large well-known regional US-only fast food chain might be as follows:

### Strengths (help, internal)

- Competitive pricing.
- Excellent economies of scale.
- Large installed base.
- Widely recognized brand.

### Weaknesses (hurt, internal)

- High employee turnover.
- Increasing consumer concern about healthiness of food.
- Menu changes slowly.
- Quality control varies due to franchised operations.

### Opportunities (help, external)

- Add healthier items to menu.
- Appeal to neglected consumers (e.g., gluten-free offerings).
- Expand business to other regions and/or other countries.
- Increase social activities to reinforce brand.

### Threats (hurt, external)

- Competitors from other countries may enter US market
- Customers are becoming more health-conscious.
- Other US fast-food chains are also changing their offerings.

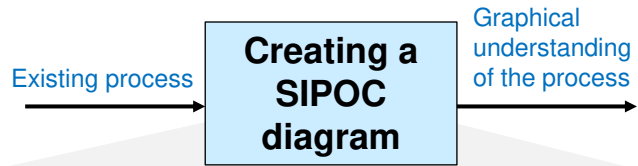
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# SIPOC (Suppliers / Inputs / Process / Outputs / Customers) and IPO

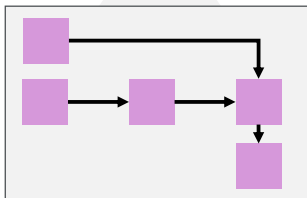
**Problem**  
How to explain a business process?

**Difficulty**  
Some training required

- A **SIPOC** diagram shows an end-to-end business process, from suppliers (S) to customers (C).
- Without the "S" and "C", a SIPOC diagram is an **IPO** diagram.
- A SIPOC diagram explains a business process, keeps team members aligned, and clarifies parts of a process.
- A SIPOC usually fits on one page.
- All 6in6 presentations have an IPO diagram (Inputs/Process/Outputs), see image to right.



1. Select a process to document and/or explain.
2. Assemble a small team of process owners.
3. Create the SIPOC diagram in the following order
  - A. Define the **process** steps (perhaps 4 to 8): **P**
  - B. List the **outputs** (perhaps 3 or 4): **O**
  - C. Identify **customers** (internal & external): **C**
  - D. List the **inputs** (perhaps 1 to 4): **I**
  - E. Identify the **suppliers**: **S**
4. Share the SIPOC diagram.

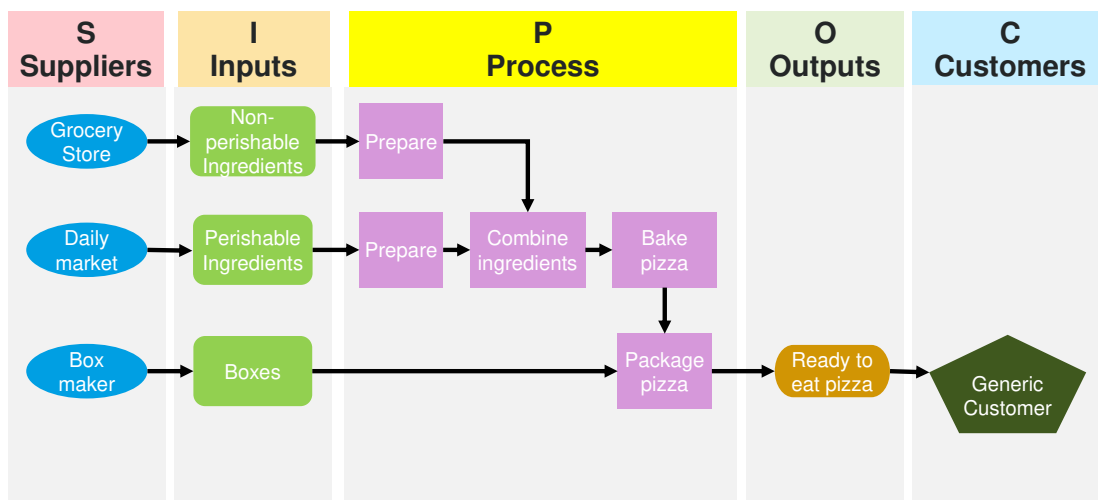


- Terms**
- **Suppliers:** The source of the inputs required by the process
  - **Inputs:** The resources needed for the process
  - **Process:** The high-level steps defining the process
  - **Outputs:** The results of the process
  - **Customers:** Those who receive outputs or benefit from the process

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## SIPOC – Example – Making a pizza

A SIPOC using a graphical representation (same data as below)



A SIPOC using a spreadsheet representation (same data as above)

Suppliers	Inputs	Process	Outputs	Customers
Grocery store	Non-perishable Ingredients	Prepare non-perishable ingredients	Ready to eat pizza	Customer
Daily Market	Perishable Ingredients	Prepare perishable ingredients		
Box makers	Boxes	Combine ingredients		
		Bake pizza		
		Package pizza		

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# Surveys

## Problem

How to obtain knowledge from people?

## Difficulty

Easy to use

- A **survey** uses questions to collect data from people.
- Survey results are statistically analyzed to draw conclusions. Many responses are required for accurate results.
- Questionnaires, a survey type, are inexpensive and quick to create, and easy to analyze.

Need understanding about a specific topic →

## Survey Process

Statistically obtained knowledge →

### Survey question attributes

- Are clear and short
- Are not biased or leading
- Ask about just one thing
- Do not contain abbreviations, jargon, or slang.
- Is a positive statement
- Uses images and videos, as needed, for clarification

### 1. Plan the survey

- Define the survey purpose
- Identify the (unbiased) survey audience
- Specify survey modality: face to face? online? paper and pencil? telephone? ...

### 2. Design the survey

- Keep it short and include instructions
- Select question types: multiple choice, ranking, rating, Likert scale, ...
- Create the questions (see attributes at left)
- Pre-test the survey and revise as needed

### 3. Collect data using the survey

- Ensure there are enough responses for useful results

### 4. Analyze the survey data

- Use a SW package to analyze the data

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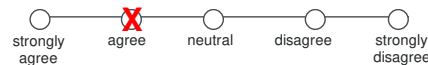
## Surveys – Example – Assessing 6in6 usefulness

Do you like the 6in6 presentations?

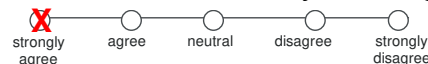


(Rating scale question)

1. The 6in6 website has a user friendly interface

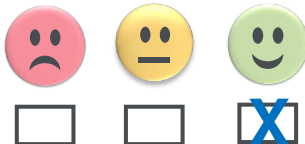


2. The 6in6 website is easy to navigate

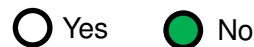


(Likert scale questions)

Have the 6in6 presentations improved your understanding of multiple topics?



Is a video presentation needed for each topic?



(Dichotomous question)

How likely are you to recommend the 6in6 site to a friend?



How many different 6in6 presentations have you used in your work?

7

The 3 things you find most important about 6in6 presentations

- |   |   |
|---|---|
| <input checked="" type="radio"/> Clarity of presentation          | <input type="radio"/> Ease of contacting author |
| <input type="radio"/> Useful for teamwork                         | <input type="radio"/> Large collection of tools |
| <input type="radio"/> Explanatory examples                        | <input type="radio"/> Website responsiveness    |
| <input checked="" type="radio"/> Ease in finding appropriate tool | <input checked="" type="radio"/> Cost (free!)   |

(Multiple choice question)

### 6in6 site comments

I love the presentation format. Please create more 6in6 presentations.

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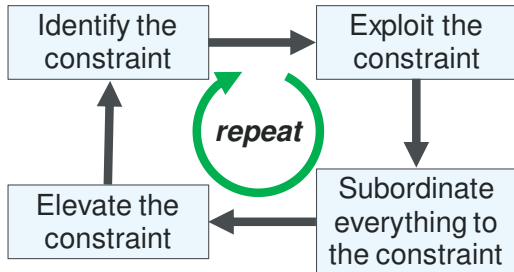
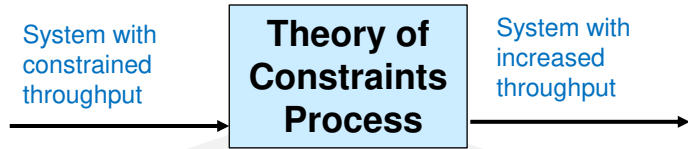
# Theory of Constraints (TOC)

**Problem**  
How to identify and remove bottlenecks?

**Difficulty**  
Some training required

The **Theory of Constraints (TOC)** states:

- System throughput is limited by a bottleneck, called the *system constraint*.
- An increase in throughput can only be achieved by making an improvement in the system constraint.
- Improvements in other parts of the system are wasted effort.

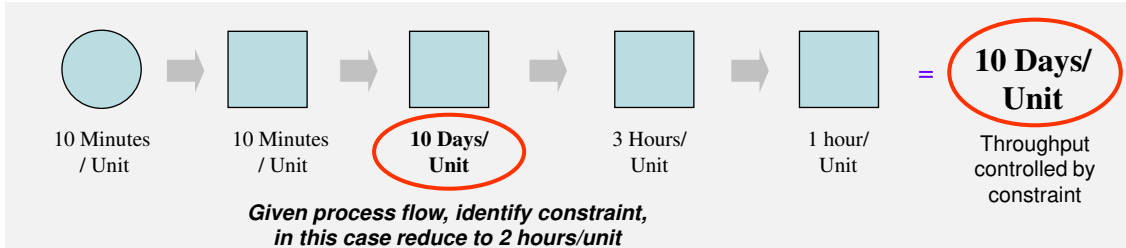


- IDENTIFY** the constraint
  - This is the resource preventing the process from obtaining more of the goal.
- EXPLOIT** the constraint
  - Ensure the constraint's time is not wasted doing things that it should not do.
- SUBORDINATE** all other processes to the above decision
  - Align the whole process to support the decision made above.
- ELEVATE** the constraint
  - If possible, permanently increase capacity of the constraint; perhaps "buy more."
- REPEAT**

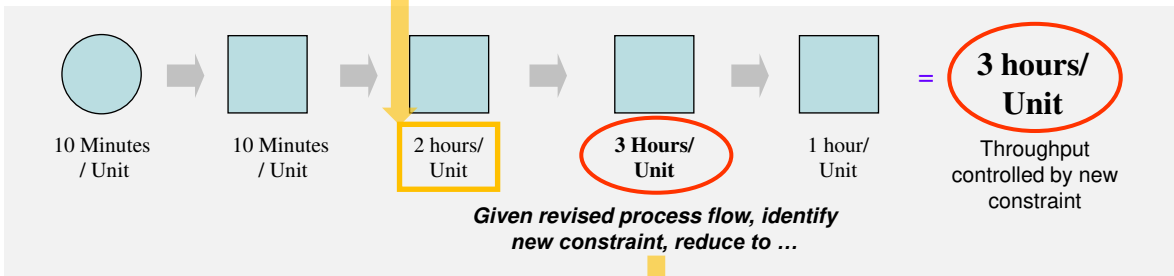
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## Theory of Constraints – Example

**Initial process flow ... find bottleneck controlling throughput .. and reduce it**



**Revised process flow #1 ... find next bottleneck controlling throughput ...**



**Revised process flow #2 ... keep iterating the process ...**

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# Theory of Inventive Problem Solving (TRIZ)

**Problem**  
How to identify ideas to solve a problem?

**Difficulty**

Work with an SME

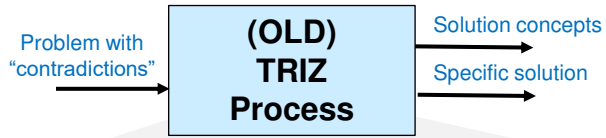
- **TRIZ** is a problem-solving tool obtained from invention patterns in the patent literature.
- TRIZ's approach is that a solution, for something close to your problem, has already been found. The goal is to find that solution and adapt it to your problem.
- Modern TRIZ uses "76 standard solutions."
- (OLD) TRIZ – easier to describe & illustrate – identified technical & physical contradictions involving "39 universal features." All solutions are then one or more of the "40 inventions."

### 39 Universal Features

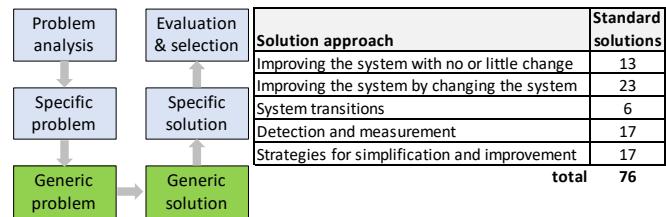
1. Weight of moving object
2. Weight of stationary object
3. Length of moving object
4. Length of stationary object
5. Area of moving object
6. Area of non-moving object
7. Volume of moving object
8. Volume of stationary object
9. Speed
10. Force
- ...
38. Extent of automation
39. Productivity

### 40 Invention Principles

1. Segmentation
2. Taking out
3. Local Quality
4. Asymmetry
5. Merging
6. Universality
7. Nested doll
8. Anti-weight
9. Preliminary anti-action
10. Preliminary action
- ...
39. Inert atmosphere
40. Composite materials



1. Create a specific problem statement.
  - Identify a **contradiction** among the **39 universal features**. That is, identify contradiction between features (A) and (B).
2. Create **generic problem** statement:
  - Want to change (A) yet (B) deteriorates
3. Use **contradiction table** to identify which of the generic solutions, among the **40 invention principles**, eliminates the contradiction
4. **Brainstorm** the generic solutions to **create potential solutions** for your problem
5. Evaluate the potential solutions



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## TRIZ (OLD) – Example – Improving a Beverage Can

(1) **Problem:** Want to *improve* can wall thickness subject to *undesirable* effect of stress on can wall  
 → A("#4, length of a stationary object")  
 → B("#11, stress")

(2) Look up (#4,#11) in universal "contradictions table" (upper left corner shown below) to find applicable invention principles: {1, 14, 35}

- 1 → Segmentation
- 14 → Spheroidality
- 35 → Change physical or chemical properties

Worsening Feature		1	2	3	4	5	6	7	8	9	10	11	12
Improving Feature	1: Weight of moving object	*	-	15 8	-	29 17	-	29 2	-	- 8	8 10	10 36	10 14
	2: Weight of stationary	-	*	-	10 1	-	38 34	-	40 28	15 38	18 37	37 40	35 40
	3: Length of moving object	8 15	-	*	29 35	-	35 30	-	5 35	-	8 10	13 29	13 10
	4: Length of stationary object	29 34	-	*	15 17	-	4	-	7 17	-	13 4	17 10	1 8
	5: Area of moving object	2 17	-	35 28	-	17 7	-	17 7	-	35 8	-	1 14	10 29
	6: Area of stationary	29 4	-	40 29	-	10 40	-	2 14	-	28 1	-	35	15 7
	7: Volume of moving object	2 26	-	14 15	-	26 7	-	7 14	-	29 30	19 30	11 15	5 34
	8: Volume of stationary	29 40	-	30 2	-	9 39	-	17 4	-	4 34	3 2	36 28	29 4

Cell at (row 4, column 11) has 3 entries: invention principles {1, 14, 35}

- [https://commons.wikimedia.org/wiki/File:Soft\\_Drink.svg](https://commons.wikimedia.org/wiki/File:Soft_Drink.svg)
- <https://commons.wikimedia.org/wiki/File:Titanium.svg>

(3) For each invention principle, look up description for inspiration. For example:

### Invention principle #1: Segmentation Principle

- Divide an object into independent parts.
  - Replace mainframe computer by personal computers.
  - Replace a large truck by a truck and trailer.
  - Use a work breakdown structure for a large project
- Make an object easy to disassemble.
  - Modular furniture
  - Quick disconnect joints in plumbing
- Increase the degree of fragmentation or segmentation.
  - Replace solid shades with Venetian blinds.

(4) Brainstorm on each of the 3 suggested invention principles to determine a solution.

### #1 Segmentation Principle

- Make the can wall corrugated – increases material for the same burst strength.

### #14 Spheroidality Principle

- Remove corners from the can, make it with rounded walls or make it a sphere – reduces material for the same burst strength.

### #35 Change physical or chemical properties

- Make the can out of a stronger or lighter material. Changes amount of material needed, and weight, for the same burst strength.

(5) Possible results



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# Thumb Voting

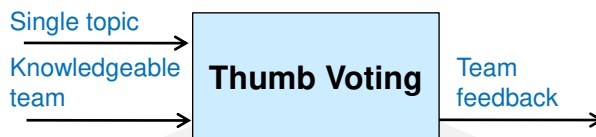
## Problem

How to quickly assess team alignment?

## Difficulty

Easy to use

- **Thumb voting** is a fast way to
  - Make a go/no go decision
  - Determine that an issue must be addressed
- Thumb voting can enable a team lead to quickly obtain consensus



1. A topic or path forward is presented.
2. Each team member uses a thumb to vote one of 3 ways:
  - Thumb up – **I agree**
  - Thumb down – **I disagree**
  - Thumb sideways – **I can “live with it”**
3. The team lead assesses the thumbs. If the number of sideways thumbs is
  - **Small** – then use the decision from the up and down thumbs
  - **Large** – then more discussion of the topic is likely needed

## 3 possible votes using a thumb



Yes  
I agree



No  
I disagree



OK  
Good enough

<https://commons.wikimedia.org/wiki/File:Thumbs-up-icon.svg>

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# Thumb Voting – Example – Team Meeting

Suppose you have a team meeting with 20 people.  
You have proposed a plan and ask for thumb votes on “**Do we proceed?**”



If you obtain	15	2	3	→ likely safe to proceed
If you obtain	12	3	5	→ likely need to review plan with team
If you obtain	10	5	5	→ certainly need to review plan

Here, there are many sideways thumbs, and the “yes” votes do not overwhelm the “no” votes. The team is not aligned.

Here, there are many more “yes” than “no” votes, and the number of “good enough” votes is modest.

<https://commons.wikimedia.org/wiki/File:Thumbs-up-icon.svg>

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# Times: cycle, lead, takt

## Problem

How to determine if a process is fast enough?

## Difficulty

Easy to use

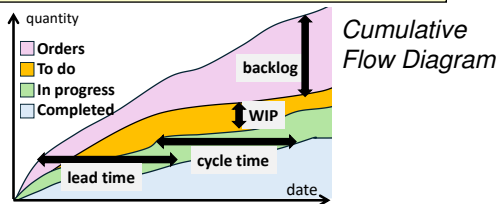
- **Cycle time:** the time taken from start to finish of a task, including loading or unloading of materials, etc.
- **Lead time:** the total time taken from order initiation until its completion, including any waiting times.
- **Takt time:** the rate at which a product needs to be created to meet customer needs.
- The cycle and lead time are determined by the process. Takt time is determined by the customer.

- Process
- Cycle times
- Customer need

## Knowing your process times (cycle, lead, takt)

- Lead time
- Takt time

1. Ensure process is under control (no large changes)
2. Obtain cycle times for each step, by measurement.
3. Determine times of non-value added activities.
4. Combine value-added times and non-value added times to obtain lead time.
5. Using customer demand, determine the takt time
  - $(\text{takt time}) = (\text{allowed time}) / (\text{number of units})$
6. Compare takt time to the cycle times
  - If  $(\text{takt time}) < (\text{all cycle times})$  then good
  - If  $(\text{takt time}) > (\text{any cycle time})$  then cannot meet customer rate, need to improve process

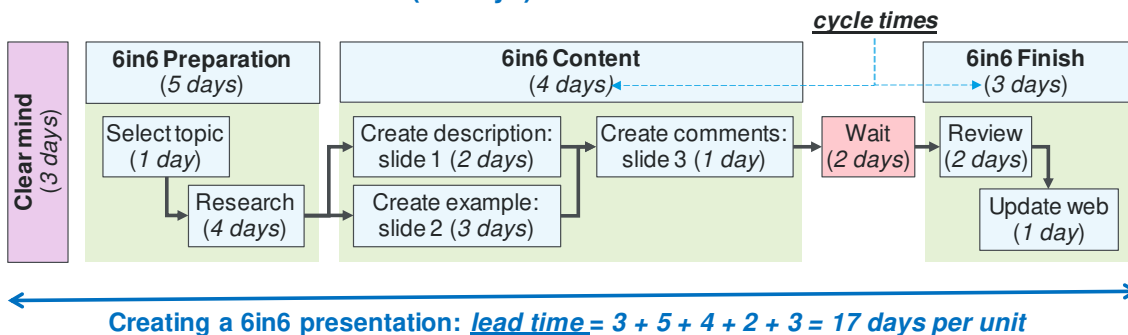


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# Times – Example – Creating 6in6 presentations

## PROCESS BASED VALUES (cycle times and lead time)

- Creating a 6in6 presentation has three value stream steps: Preparation, Content, Finish.
- Each step and each sub-step have cycle times.
- For the process below, the cycles times are listed in each box.
- The calculated **lead time** is **(17 days)/unit**.



## CUSTOMER BASED VALUE (takt time)

- Suppose a customer requests 26 new 6in6 presentations per year.
- The work year has 260 days = (52 weeks) \* (5 work days per week)
- The **takt time** is:
 
$$(\text{takt time}) = (1 \text{ year}) / (26 \text{ units}) = (260 \text{ days}) / (26 \text{ units}) = \mathbf{(10 \text{ days})/unit}$$
- Since **(each cycle time) < (takt time)**, the process achieves the customer output rate.

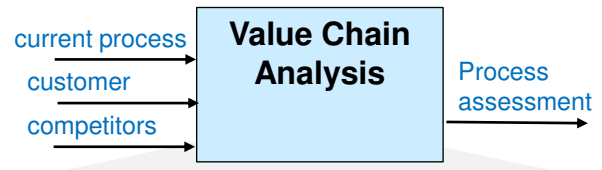
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# Value Chain Analysis (VCA)

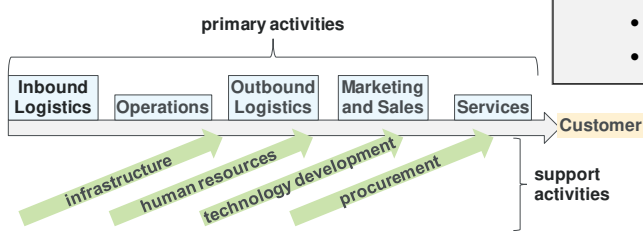
**Problem**  
How to identify customer care-about's?

**Difficulty**  
Work with an SME

- A **Value Chain Analysis (VCA)** shows the business activities and processes involved in creating a product or performing a service.
- A value chain has **primary activities** and **support activities**:
  - **Primary activities** – activities which directly add value to the customer
  - **Support activities** – activities that support primary activities
- A value chain analysis can lead to
  - reduced cost
  - products better aligned with your customer

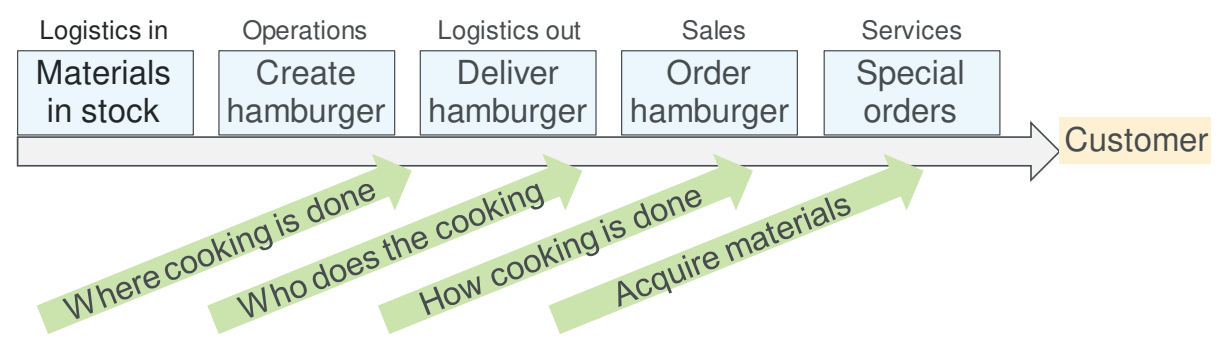


1. Assess your product's activities, such as:
  - **Primary activities:** Inbound Logistics, Operations, Outbound Logistics, Marketing and Sales, and Services.
  - **Support activities:** Infrastructure, Human Resources, Procurement, and Technology.
2. Analyze the value and cost of these activities.
3. Model your competitors' value chains.
4. Model your customer's assessment of value.
5. For your activities, determine where you
  - can reduce costs or improve efficiency
  - can create a competitive advantage



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## Value Chain Analysis – Example – Buying a hamburger at a fast food restaurant



1. The customer understands, and values, the primary activities.
2. The value chain identifies potential opportunities. A customer may pay a premium for
  - better materials (e.g., fresh ingredients)
  - better production (e.g., faster product delivery)
  - better delivery (e.g., on-site or home delivery)
  - an easier ordering process (e.g., phone app)
  - the ability to have special orders.
3. The customer (likely) does not care about where, how, or by whom the cooking is done, nor how the needed materials are acquired.
4. From the Value Chain, we can identify:
  1. improvements (make these)
  2. costly processes (reduce these)

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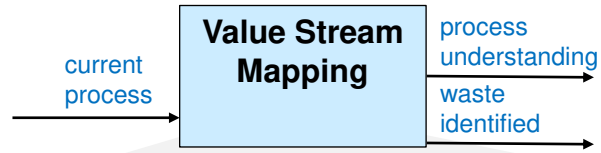
# Value Stream Mapping (VSM)

**Problem**  
How to add value for your customers?

**Difficulty**

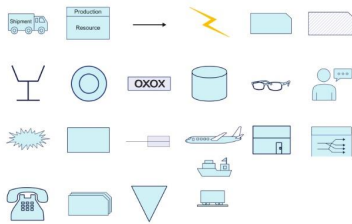
Work with an SME

- A **Value Stream Map (VSM)** graphically shows, for a single product or service, the material flows and the information flows that signal and control the material flows.
- A VSM uses standard icons to represent processes, materials, and information.
- The VSM shows how customer value is added at each step.
- Typically both a **Current State Map** (the current process) and a **Future State Map** (what the process could be) are created.



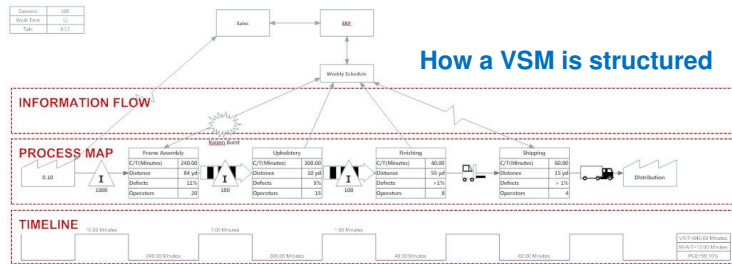
1. Assess your product's or service's steps. For each step, determine:
  - The work and wait **times**
  - The **labor needs** (including overtime)
  - The **error rates**
  - The system **downtime**
  - The **inventory level** (excess or shortfall)
  - The production or process **delays**
2. Create a graphic using standard icons.
3. Assess the current state VSM to identify waste.

## Some standard VSM icons



<https://www.edrawmax.com/article/value-stream-mapping-symbols.html>

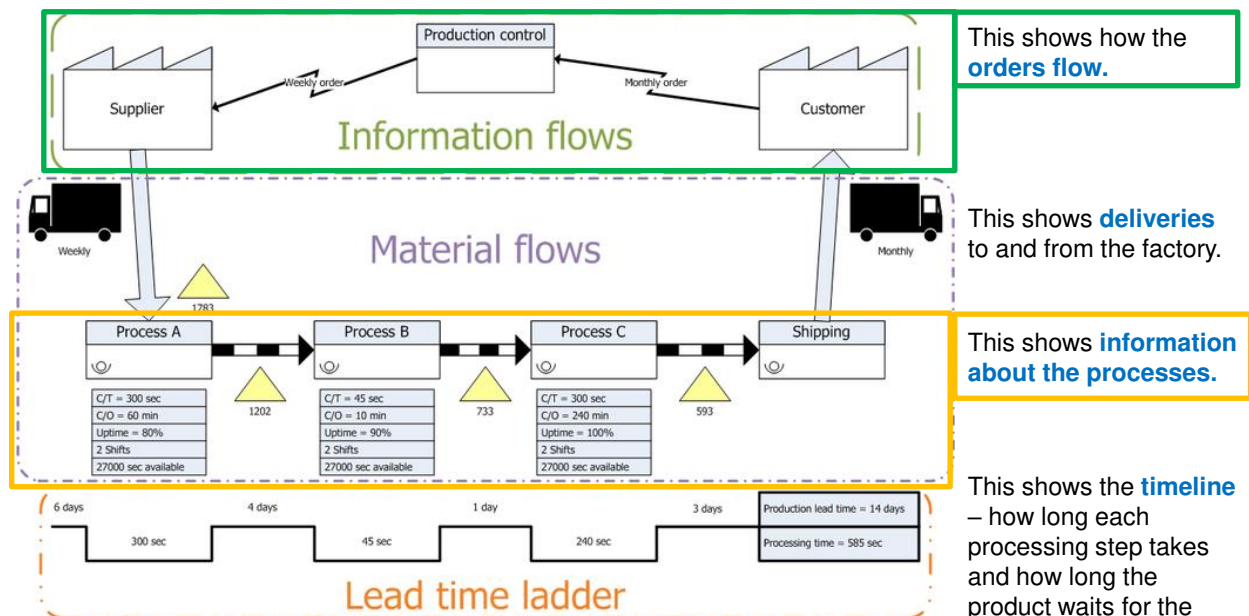
Inventory	100
Stock Type	15
Lot	100



<https://www.smartdraw.com/value-stream-map/>

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# Value Stream Mapping – Example – Generic Factory



This shows how the **orders flow**.

This shows **deliveries** to and from the factory.

This shows **information about the processes**.

This shows the **timeline** – how long each processing step takes and how long the product waits for the next processing step.

<https://en.wikipedia.org/wiki/File:ValueStreamMapParts.png>

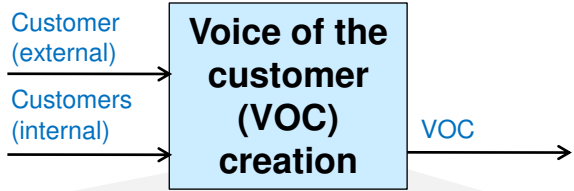
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# Voice of the Customer (VOC)

**Problem**  
How to delight a customer?

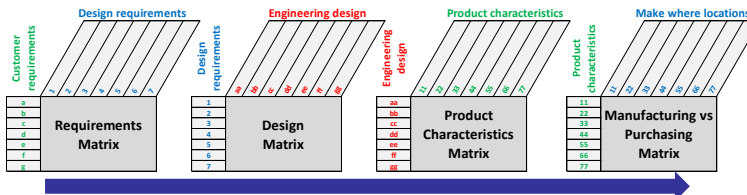
**Difficulty**  
Some training required

- The **Voice of the Customer (VOC)** represents the **customer's thinking**:
- Wants
  - Functions
  - Don't wants
  - Features
- VOC flows through the value stream:**
- Customer to (e.g., NASA)
  - customer to (e.g., Bus Develop)
  - customer to (e.g., Systems Eng)
  - customer to (e.g., Hardware)
  - customer to (e.g., DFMA team)
  - ...



- Identify the **product** and its external customers.
- Identify the **customers** along the value stream.
- For each customer – find **product attributes**
  - A great product is one that results in \_\_\_?
  - A great product is one that is \_\_\_?
  - A great product is one that has \_\_\_?
  - Problems in similar products \_\_\_?
- Determine improvement **priorities**.

VOC traceability – perhaps via a sequence of QFDs – ensures VOC alignment



- VOC is part of a product's "chorus"**
- VOB – Voice Of the *Business*
  - VOC – Voice Of the *Customer*
  - VOCO – Voice Of the *COmpetitor*
  - VOTE – Voice Of the *Environment*

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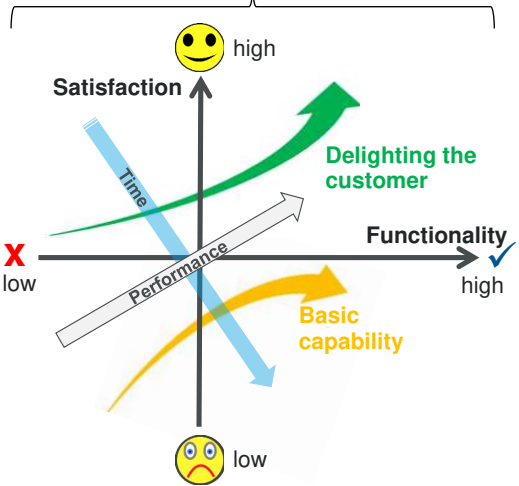
## VOC – Example – Assessments & Car Seat Belts

Customer dimensions include satisfaction and functionality. VOC determines a customer's level of each.

The **Kano model** – graphing functionality versus satisfaction – shows that, over time, "delighters" become "must haves".

- Satisfaction scale**
- 
- Delighted
  - Satisfied
  - Neutral
  - Dissatisfied
  - Frustrated

- Functionality scale**
- 
- None    Some    Basic    Good    Best
- 1    2    3    4    5



- Three ways a customer responds to an offering:
- Excitement** – the WOW factor in a product/application
  - Performance** – the more of it, the better
  - Basic** – each of these is must have

- Example: car seat belts**
- 1950's – car seat belts are **exciting** – wow!
  - 1960's – car seat belts indicate **performance** – one of many high end features
  - 1970's – car seat belts are a **must have** – can't buy a car without them

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