Eliminating Preventable Work to Free Up Your Time



CIPMM Regional Workshop - Toronto
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01-11-2023

Overview

- 1. Three reasons why we are we so busy
 - Broken process
 - Personal time management decisions
 - Failure Demand
- 2. What is Failure Demand / Preventable Work
 - What causes it?
 - What can we do about it?
 - Practical tips to eliminate it
- 3. Wrap-up your next steps



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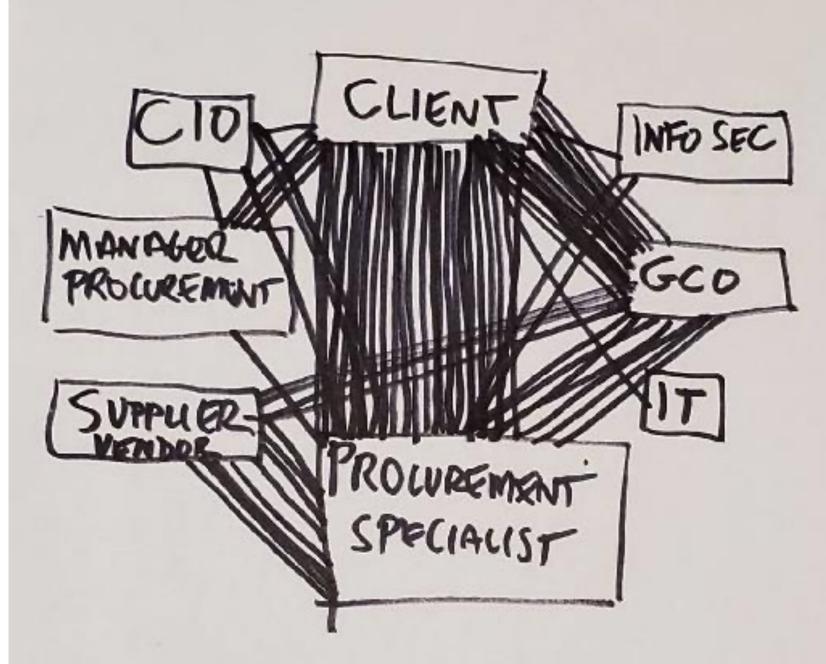
The Problem

Procuring Cloud Software > \$ 100k value

- Approximately 100 steps/handoffs
- 3-5 months of elapsed time
- Unhappy clients, procurement staff
- Procurement staff overloaded
- Slow process affecting delivery of core business

NOW:

- 3 weeks elapsed time from start to finish, by default.
- No heroics.
- Procurement staff happier, less-stressed.
- Clients delighted.

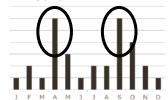


How Backlogs Develop

VARIATION

Variation in:

- volume of work
- # of resources available
- skill profile
- complexity of work
- · effectiveness of tools
- · other?





UNREASONABLENESS

2. Overwhelmed team, thus reduced productivity





5. Fewer files finished, a growing backlog





WASTE

- 3. Team spends its reduced capacity on non-value added, preventable, work
 - Fixing errors
 - Clarifications
 - Re-drafting
 - False starts
 - Looking for information
 - Unnecessary approvals
 - Excessive processing



made worse by

- 4. Team spends capacity on:
- Client progress-chasing calls
- backlog reporting







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Personal Time Management Topics

- Boundaries
- 2. Switch-tasking vs focus
- 3. Interruptions
- 4. Meetings
- 5. Unclear Jobs to Be Done
- 6. Unclear requests & commitments
- 7. Sequential reviews/approvals
- 8. Waterfall style instead of focus
- 9. Working by email instead of F2F
- 10. Procrastination



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Two Types of Demand





Contacts that we WANT.

Eg:

Initiate a transaction

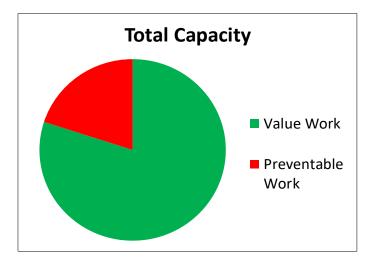


Failure Demand

- Contacts we DON'T WANT
- Arising from a failure to do something or do something right.

Eg:

- I don't understand can you explain?
- You got this wrong.
- You missed something.
- How do I do this?
- Who do I call?
- Progress chasing where is my stuff?





"Failure Demand" drains capacity but does not add value

Туре	Example	Waste
1. Something not done	Document, information missing – go find it	Defect
2. Something not done right	Wrong information, misplaced info – redo it	Defect
3. Something is not clear	Unclear instructions, requirements – go get clarification	Defect
4. Something takes too long	Chasing progress, answering	Waiting & Excessive processing

Procurement examples of 1, 2, and 3 from your world?



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The "North Star" Design Question – forms, templates, web pages, instructions, etc.

Do

- first-time users,
- busy, distracted, users, or
- your worst-performing users
 get it right, on the first attempt, unassisted, 19 times out of 20?

This is the theme of the February 7 follow-up session.



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INSTRUCTIONS FOR PERSONNEL SCREENING CONSENT AND AUTHORIZATION FORM TBS/SCT 330-23E (Rev. 2002/02) Once completed, this form shall be safeguarded and handled at the level of Protected A.

If space allotted in any portion is insufficient please use separate sheet using same format.

1. Section A (Administrative Information) Authorized Departmental/Agency/Organizational Official

The Official, based on instructions issued by the Departmental Security Officer, may be responsible for determining, based on five year background history, what constitutes sufficient verification of personal data, educational and professional qualifications, and employment history. References are to be limited to those provided on the application for employment or equivalent forms.

SUPPLEMENTAL INFORMATION REQUIREMENTS

Persons who presently hold a SECURITY CLEARANCE and subsequently marry, remarry or commence a common-law partnership, in addition to having to update sections of the Security Clearance Form (TBS/SCT 330-60), are required to submit an original Personnel Screening, Consent and Authorization Form, with the following parts completed:

Part A - As set forth in each question

Part B - As set forth in each question, excluding CRIMINAL CONVICTIONS IN AND OUTSIDE OF CANADA.

Part C - Applicant's signature and date only are required

"Other". This should be used to identify if the security screening is for Site Access, NATO, SIGINT etc.

2. Section B (Biographical Information)

To be completed by the applicant. If more space is required use a separate sheet of paper. Each sheet must be signed.

Country of Birth - For "NEW" requests, if born abroad of Canadian parents, please provide a copy of your Certificate of Registration of Birth Abroad. If you arrived in Canada less than five years ago, provide a copy of the Immigration Visa, Record of Landing document or a copy of passport.

- List only criminal convictions for which a pardon has NOT been granted. Include on a separate attached sheet of paper, if more than one conviction. Applicant must include those convictions outside Canada.
- Offences under the National Defence Act are to be included as well as convictions by courts-martial are to be recorded.

3. Section C (Consent and Verification)

A copy of Section "C" may be released to institutions to provide acknowledgement of consent.

Criminal record checks (fingerprints may be required) and credit checks are to be arranged through the Departmental Security Office or the delegated

Consent: may be given only by an applicant who has reached the age of majority, otherwise, the signature of a parent or guardian is mandatory.

The age of majority is:

19 years in NFLD., N.S., N.B., B.C., Yukon, Northwest Territories and Nunavut; 18 years in P.E.I., Que., Ont., Man., Sask. and Alta.

The applicant will provide initials in the "applicant's initials box".

- The official who carried out the verification of the information will print their name, insert their initials and telephone number in the required space.

 Reliability Screening (for all types of screening identified within Section A): complete numbers 1 and 2 and 3 if applicable.
- Security Clearance (for all types of screening identified within Section A): complete numbers 1 to 4 and 5 where applicable.

 Other: number 5 is used only where prior Treasury Board of Canada Secretariat approval has been obtained.

To be completed by authorized Departmental/Agency/Organizational Official who is responsible for ensuring the completion of sections A to C as

5. Section E (Approval)

Authorized Departmental/Agency/Organizational Security Official refers to the individuals as determined by departments, agencies, and organizations that may verify reliability information and/or approve/not approve reliability status and/or security clearances. Approved Reliability Status and Level I, II and III, as well as the signature of the authorized security official or manager are added for Government of Canada use only. Applicants are to be briefed, acknowledge, and be provided with a copy of the "Security Screening Certificate and Briefing Form (TBS/SCT 330-47)".

Note: Private sector organizations do not have the authority to approve any level of security screening.

Photographs: Departments/Agencies/Organizations are responsible for ensuring that three colour photographs of passport size are attached to the form for the investigating agency. Maximum dimensions are 50mm x 70mm and minimum are 43mm x 54mm. The face length from chin to crown of head must be between 25mm x 35mm. The photographs must be signed by the applicant and an authorized security official. The photographs must be have been taken within the last six months. It is required for new or upgrade Level III security clearances for identification of the applicant during the security screening investigation by the investigating agency. The investigating agency may in specific incidents request a photograph for a Level I or II clearances when an investigation is required.

TBS/SCT 330-23E (Rev. 2006/02)

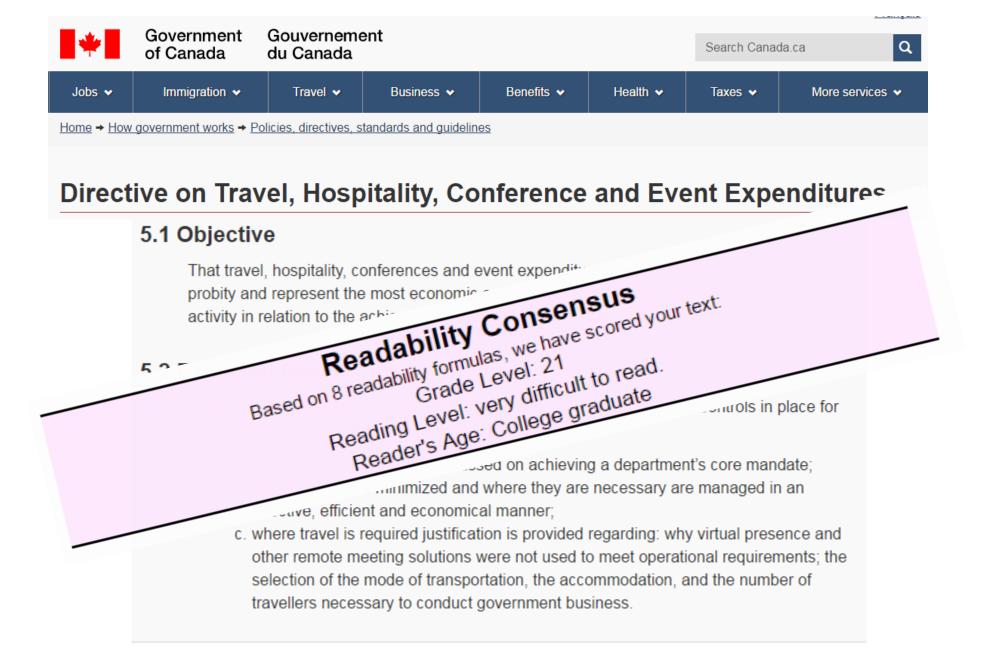
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Causes of Failure Demand

COMPLICATED LANGUAGE







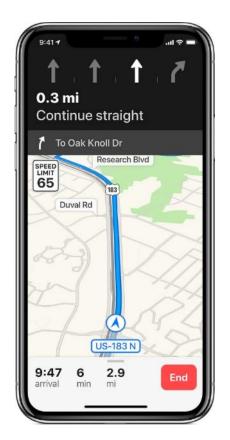
Causes of Failure Demand

THE CURSE OF KNOWLEDGE



The Curse of Knowledge: Put yourself in their shoes









Causes of Failure Demand

LAYOUT

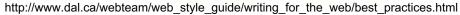


How Web Readers Read

Most online readers scan first.

Eye-tracking studies show that most people read web content in and F-Pattern starting at the top-left of a web page before moving further down through its content.

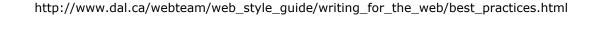






Mute your earbuds before crossing the street

The research found that distractions such as texting and talking on the phone impaired participants' ability to cross the street safely, but listening to music posed the greatest risk. As a result Dr. Shwebel recommends encouraging kids to mute their earbuds while crossing the street. Kids should also avoid talking on the phone or texting and instead to pay full attention to the road and other surroundings.





Mute Your Earbuds Before Crossing The Street

What Kids Should Do

- mute their earbuds while crossing the street
- avoid talking on the phone or texting
- pay full attention to the road and other surroundings

The Evidence

Distractions that impair children's ability to cross the street safely included:

- listening to music
- texting
- talking on the phone



Causes of Failure Demand

CAN'T FIND IT







Submit an Online Complaint

If you are a client of Veterans Affairs Canada and you feel you have been treated unfairly, or you would like information about how to solve a problem, the Office of the Veterans Ombudsman is here to help.

Reports

<u>Supporting III and Injured RCMP Members and</u> their Families: A Review

<u>Support to Military Families in Transition: A</u>
<u>Review</u>

Annual Report 2014 - 2015

View All Reports

News Releases

Ombudsman presents 2016 Veterans
Ombudsman Commendation Recipients

June 14, 2016

View All News Releases

Media Advisories

<u>Veterans Ombudsman to Award 2016</u> <u>Commendation Recipients</u>

June 13, 2016

© LEAN AGILITY

View All Media Advisories

Veterans Ombudsman's Blog

Shaping tomorrow's continuum of care for our Veterans

The needs of our Veterans' population are changing, with the number of modern-day Veterans receiving long-term care from VAC continually increasing. This changing population comes with their own unique needs that must be considered in the development of a long-term strategy to support all Veterans. Read my thoughts on the way forward in my latest bloo.

A week of recognition: my favourite kind of week!

This week was filled with recognition of members of the Veterans' community and the OVO team, and learning from their diverse experiences and perspectives. We thank all those who made this such an insightful and motivating week.

Canada hosting the 2017 Invictus Games!

Canada will host the 2017 Invictus Games from September 26 - 30, 2017 in Toronto. What a great opportunity to cheer on our Canadian competitors right here at home!

View All Blog Posts

Success Stories

Transcription | Video Gallery

Significant Increase in Disability Assessment

A Veteran contacted the Office of the Veterans Ombudsman because he was unsatisfied with the initial (interim) assessment of 28 percent that he had received for several major injuries sustained ...

Veterans Independence Program

In another instance, VAC denied a request from a Veteran for social transportation costs under the Veterans Independence Program. The reason for the decline was that although he was a pensioned ...

<u>Light Therapy for Depression</u>

A Veteran was recommended light therapy by two physicians as treatment for a pensioned condition. VAC denied the coverage as the device was not on their benefits grid. Following discussion with ...

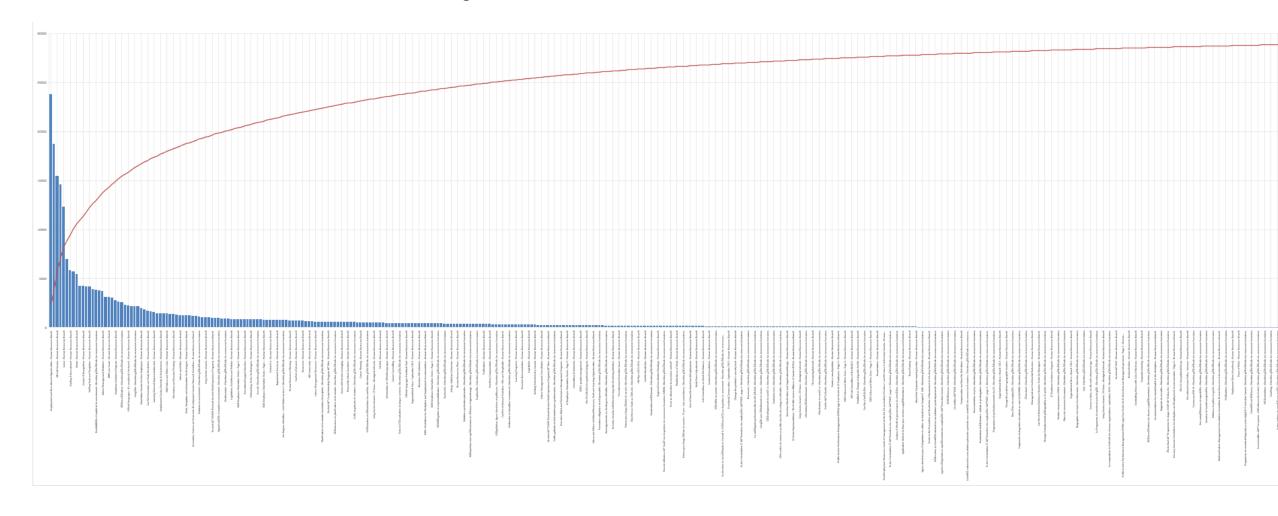
<u>Veteran's Vocational Rehabilitation Plan Gets a</u> Second Look

A Veteran contacted the Office of the Veterans Ombudsman because he was feeling unsure about the career path Veterans Affairs Canada had selected for him and was worried that the Department was ...

It's worth the Insulin

An 87 year old Veteran contacted the OVO indicating that he requires a specific type of insulin that is not covered through the VAC drug plan. The client submitted a Doctor's note ...

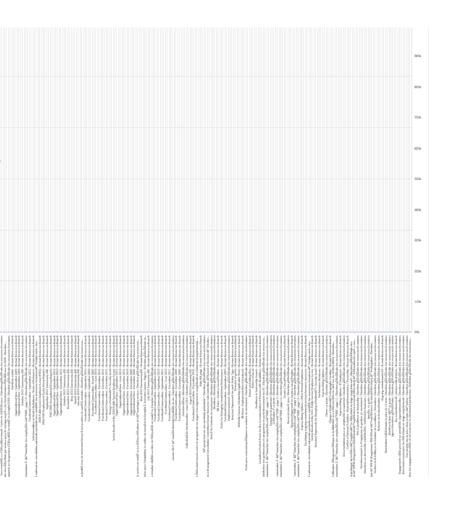
Intranet Page Views in Past 12 Months





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In past 12 months:

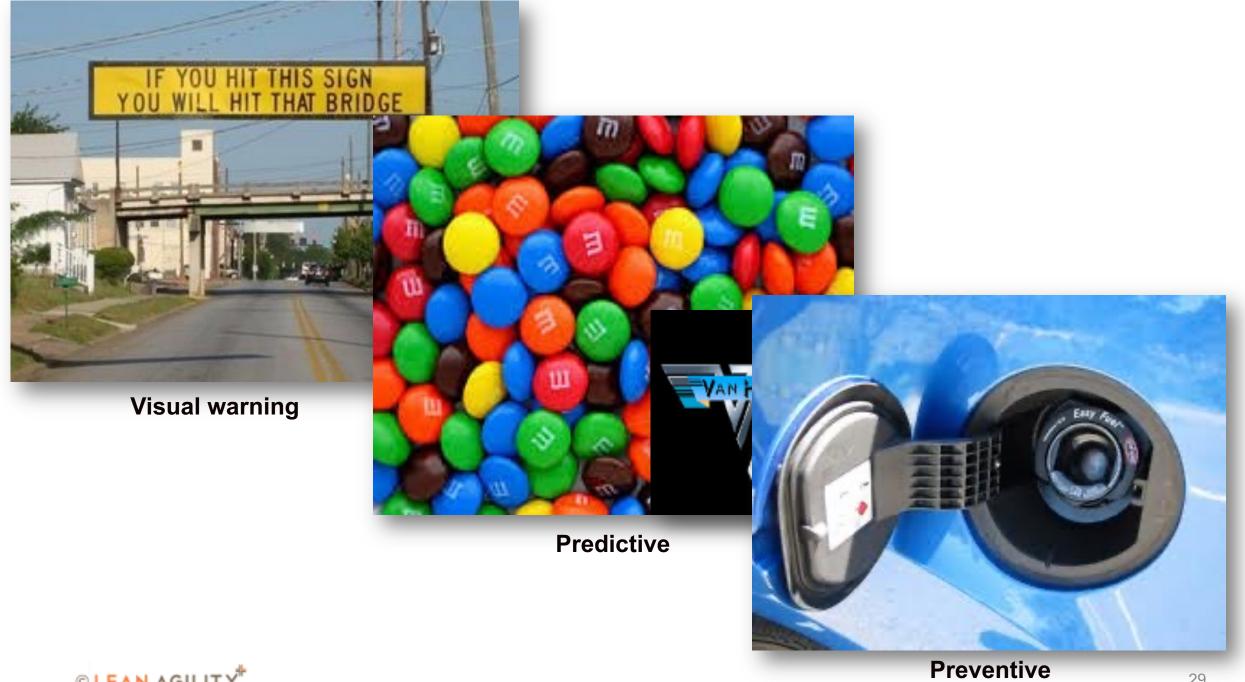
- 1110 pages on Intranet site
- Top 3 pages account for 28% of views
- Top 5 pages account for 32% of views
- Top 18 pages account for 75% of views
- How many pages have almost no views?



Causes of Failure Demand

NOT ERROR-PROOFED





Overview

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 - Broken process
 - Personal time management decisions
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- 2. What is Failure Demand / Preventable Work
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- 3. Wrap-up your next steps



Steps to Eliminate Failure Demand

- 1. Measure it
- 2. Drill into it with real-life users and data
- 3. Protype
- 4. Test with real-life users



Measure It

Unclear/Incorrect Client Application Forms

DESCRIPTION: 75% XYZ of application forms received with:

- Action requested unclear
- Incorrect financial info

- IMPACT:
- Analyst has to contact applicant, sometimes multiple times, to ask for corrections and changes; then review re-submitted form. ANALYST: extra 45 mins effort each time.
- Slows down process by 5-10 business days



Title: <u>Unclear/Incorrect Client Application Forms</u>

Process Step: Review Client Procurement Application Form

What Happens: When Clients submit their application forms, 75% of the time they submit forms with:

- Unclear "Action Requested"
- Action requested and details do not match

This results in Officers going back to clients at least once to obtain clarifications and corrections.

Root Causes:

- Application form asks overly broad questions that do not guide client to provide specific, detailed answers (e.g. justification)
- No fields in form for certain required information
- Written in procurement language, not language of client
- · Client does not know what a successfully-completed form looks like
- Form not understandable "at a glance"

What percentage of files does it happen to?	75% of application forms			
Number of files per month:	Avg .100			
Number of affected files per month:	75 Intake forms per month			

Who is affected and what is impact when this happens once?

Time is unitable.	<u> </u>	<u>,</u> .
Officer	 Note problems and advise client via email, explain issue and how to 	30 mins. effort
Client	resolve	20 mins offert
Client	 Research and provide updated information and form 	30 mins. effort
Officer	Review re-submitted form	15 mins. effort

Solutions:

- Update application form to eliminate root causes of unclear and incorrect responses
 - Create prototype with clearer, detailed question and example of correctly-filled out form
 - Test prototype on 5 "occasional" clients, obtain their feedback at time of use
 - 3. Adjust prototype
 - 4. Launch new form

Quick Wins:

Include example of properly filled-out form to client in rework email to clients

Total Preventable Effort (by month)

Intake Officer		56.25 hours per month 9.4 days per month
Client	30 min X 75 files = 2,250 min	37.5 hours per month

Prediction:

 $\underline{\textbf{If}}$ we modify the form $\underline{\textbf{THEN}}$ we would expect that the percentage of unclear/incorrect forms would drop from 75% to 25%, saving 6 days of Officer effort per month.

Elapsed Time Impact: Adds 5-10 business days of delay to the typical request

What have we learned from this experiment?

- •
- •



Collect Data



What is Reviewed	Procurement Specialists	GCO	Manager Procurement	IT Financial Procurement Specialist	
Internal Request				·	
Non-Competitive procurements - cost is beyond threshold				100%	
Duration/term missing or unclear				80%	
Insufficient business rationale (general)				75%	
Draft RFP					
Term, scope, evaluation, pricing, mis-alignment between rated/scope/appendix A	1 - 80% 2 - 60% 3 - 30%				
Wrong procurement vehicle	30-40%				
An element of the Scope of Work/description of product unclear, lacks detail		70-90%			
Evauation criteria and weighting do not fully reflect 1.) business requirements; 2.) pricing response, 3.) term sheet/service agreement response		60-80%			
Wrong version, not current RFP template		15-30%			
Response Template questions don't reflect scope of work		30-50%			
Changing business terms eg. Price		40-60%			
Proposals					
Completion, missing element in Bravo	10-20%				
Evaluation Template					
Missing comments / rationale	25%				
Evaluation					
Variance or discrepancy in results	10-20%				
CIF/Memo					
Missing info: -No GCO contact -Wrong exemption -Addition errors Missing history - spend	50%				
No access to project files needed to prepare CIF				70-90%	
Inconsistencies between contract, CIF and memo			10%		
Memo- basic info missing what, why, how much, budget			10%		
Issues with math, dates, budget, procurement method, exemption (Schedule A), type, completeness, signatories			50%		
Contract					
Issues with Appendix A, dates, ceiling, disb/taxes, signatories			5%		
LEGEND					

Drill into it with real-life users

Power Users

- + Optimize
- + Learn shortcuts
- + Make it work great for Power Users
- Atypical of larger user base?
- May not work for Worst-Performing Users

Worst-Performing Users

- + Often most typical of user base
- + If it works for them, it will work for anyone
- Miss out on insights of Power Users?
- May not allow Power
 Users to perform at peak anymore?

Hallway Usability Test

- Ask someone with no background in the VWI's topic to read it and provide feedback
- Ask them to speak their current thoughts as they use the VWI

Can a first-time user get this right 19 times out of 20 without any assistance?



- What part(s) were clear?
- 2. What was unclear?
- 3. How would you change it to make it easier to use and more effective?



Observation Test

Observe a target user performing the task with aid of the prototype.

- 1. Did the user perform the task effectively?
- 2. What parts did they use?
- 3. What parts did they skip?
- 4. Where did they get stuck?



Can a first-time user get this right 19 times out of 20 without any assistance?



Testing Question Sheet

What triggers you to complete and submit these forms? How do you know when to submit these forms?	
Where do you find the forms?	
Who/what is impacted by completing and submitting these forms?	
Who do you (who would you) contact if you have questions on how to complete these forms?	
Please fill in the form, section by section and talk us through your thought process. Show us which specific part(s) are clear? Show us which specific part(s) are unclear? How/why?	
How would you change the form to make them easier to use and more effective?	
Other Notes:	



Prototype It, Then Re-Test

- Create a new prototype based on your initial testing
- Test it with a different set of users



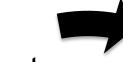
Test your solution ideas: Plan, Do, Check, Adjust

If the solution met its desired result, adjust your daily way of working to incorporate it on an ongoing basis. What did you learn? What's next?

Measure results Did

the solution achieve

the desired result?



4. Adjust



1. Plan

Define your plan – what is the solution you are testing? "If we do X then we expect Y to happen"





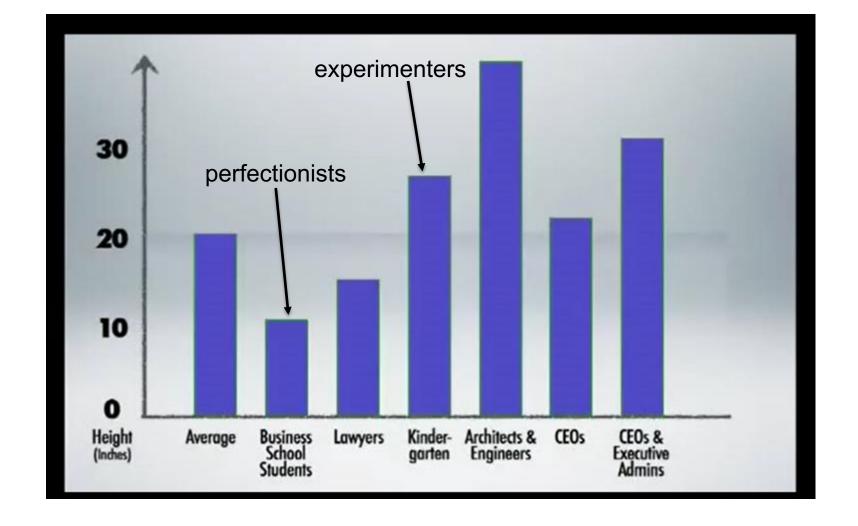
3. Check



2. Do

Try the solution in a small, managed experiment





Excellence is not created by perfectionism. It is created through experimentation, learning and iteration.



Google's Research on High Performing Teams

1 Tea

Psychological Safety

Team members feel safe to take risks and be vulnerable in front of each other.

2

Dependability

Team members get things done on time and meet Google's high bar for excellence.

3

Structure & Clarity

Team members have clear roles, plans, and goals.

4

Meaning

Work is personally important to team members.

5

Impact

Team members think their work matters and creates change.

"A group of us in Google's People Operations what we call HR) set out to answer this uestion using data and rigorous analysis: What makes a Google team effective? We shared our research earlier today with the Associated Press, and we're sharing the findings here, as well.

Over two years we conducted 200+ interviews with Googlers (our employees) and looked at more than 250 attributes of 180+ active Google teams. We were pretty confident that we'd find the perfect mix of individual traits and skills necessary for a stellar team -- take one Rhodes Scholar, two extroverts, one engineer who rocks at AngularJS, and a PhD. Voila. Dream team assembled, right?

We were dead wrong. Who is on a team matters less than how the team members interact, structure their work, and view their contributions. So much for that magical algorithm."



Psychological Safety Exercise

Round table, by unit, each participant shares with the others at the table:

- 1. Something in their career that they are proud of
- 2. An embarrassing moment in their career



None of us are perfect, so why pretend? And if we're always trying to look perfect, then we won't likely identify problems and solve them.



Overview

- 1. Three reasons why we are we so busy
 - Broken process
 - Personal time management decisions
 - Failure Demand
- 2. What is Failure Demand / Preventable Work
 - What causes it?
 - What can we do about it?
 - Practical tips to eliminate it
- 3. Wrap-up your next steps



NEXT STEPS



Three Things You Can Do Next

- 1. Identify your worst forms of failure demand; measure their cost
- 2. Identify root causes
- 3. Prototype and test solutions



Have fun!





Want to bring this talk to your organization for free? Get in touch.

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- Training
- Facilitating improvement projects
- Troubleshooting organizational performance

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Better, faster, more efficient government and inspired people.

