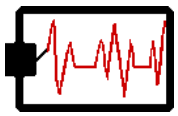
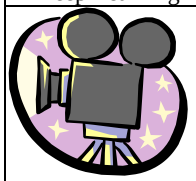
Name: _____ Date: _____ Phone: _____ Email: _____

This worksheet is used to capture examples of tools used by government entities involved in improvement of procurement practices.

Steps	Tools/Resources*	Dependencies	Challenges	History
Keep the Purpose in Mind	• Use of strategic planning: SWOT analysis • Mission, vision, principles, values: ACORN test • Continuum of Team Goals • Staff summary sheets • Cost-benefit analysis • Ethical considerations • Pareto diagrams	Align with the larger organizational strategy, clarify the team's purpose, and define the constraints on decision making		
Find Opportunities	**Improvement model used, if any, e.g. Lean Six Sigma or Kaizen?** • Appreciative Inquiry • Prior organizational strategic planning • Mission/vision/principles? • SWOT? • Requirements matrix/voice of customer • Matrix diagrams/House of quality • "As is" - "should be" gap?	Involve customers and stakeholders in defining the gap between the "what is" and the "should be" and the path to change.		
Learn from the stars	• Finding, assessing, using best practices • Benchmarking analysis tools • Lessons learned: limitations of benchmarking	Learn from others who may have solved the same problem, developed best practices, or used relevant benchmarks. Keep an eye on system performance.		
Promote the Team	• Conflict management models/tools • Team training plan/resource library • Brainstorming, normative group technique • Affinity diagrams • Mind, brain, or idea mapping • Prioritization matrix/multi-voting • Criteria filtering • Benefits and barriers/force field analysis (change)	Take time to meld a small team with technical, interpersonal, and problem-solving skills that shares the work and embraces mutual accountability, constructive conflict, decisiveness and commitment to results: Have the right people on the team: the voice of the customers; Create a compelling purpose; Create just enough – not too much – structure; Design meetings that engage the members: use questions; encourage conflict; Model the way to team norms: authenticity; everyone does real work; we don't take calls when we're meeting; we go where the facts lead us; what we say stays confidential; if we commit, we deliver; we succeed or fail as a team Relentlessly pursue results; Foster a supportive context: reward and acknowledge often; Integrate more senior leadership effectively; When stuck, find a simpler problem to solve together, like rewriting the purpose;Do the same in virtual teams; it's just harder!		
Plan, Commununicate, Follow-up	• Action oriented meeting agendas/minutes • Project charter/plan • Communications plan • GANTT chart, PERT chart, Arrow diagrams • Story boards • Progress reports • Linear Responsibility charts • Project closure tools	Plan, schedule, and control. Develop SMART objectives, set priorities, commit to deadlines, create and execute a communications plan, and adjust plans where necessary.		

'*These lists are intended to help jog memories about resources/tools that may have been used in an improvement project.

First How? Then Why? Decide	• Process diagrams/maps or flowcharts • Deployment flowchart/"swim lanes" • Fishbone or Ishikawa diagrams • Relations diagrams/Root cause analysis • Is-Is Not diagram/Why-Why diagram/5 Why's • Lean 5S's/Work flow/spaghetti diagrams • Value added analysis/Value maps • SIPOC • Decision matrix/decision-making models	Balance expansion of ideas with focusing and analytical tools to find root causes at the heart of problems, using pilot experiments to test solutions and support needed change.
 Use Meaningful Mearsures of Merit	• Balanced Score Card • Use of data to create change imperative • Surveys and survey analysis • Excel conditional formation/statistical analysis • Histograms/scatter charts/pareto diagrams	Find and use meaningful measures of merit that reduce uncertainty in decision making using balanced financial, process, and outcome measures; develop and continuously monitor controls to achieve reasonable assurance of desired performance.
Embrace Change! (manage risk and resistance)	• Contingency diagrams • Mistake proofing • Analysis of magnitude/likelihood • Avoidance, accepting, reducing, sharing? • Risk Management plan	Plan to meet challenges from change, assess the likelihood and impact of other risk to the project, and use risk avoidance, transfer, and acceptance. John Kotter's eight-step model: Create urgency, form a powerful coalition, create a vision for change, communicate the vision, remove obstacles, create short-term wins, build on the change, and anchor the change in the culture.
Keep Learning	• Checklists • After action reports • OJT and mentoring • Standardization • Policies and procedures manuals	Build structures for informal learning: simplify, surprise, make it concrete and emotional to satisfy the WIIFM, promote networked learning, and sustain improvement.
 Lead Laterally	Were there examples of: • Tolerance for/learning from failure • Counterproductive "launches" of initiatives • Metric madness • Running interference with senior leadership • Challenges from matrix team organization • Effective responses to plateaus in momentum • Use of "celebrations" recognition • Sustaining improvement	• Use appreciative inquiry to find opportunities. • Take time to form, promote creativity and resist judging too early • Contribute to management of complex situations. • Don't be afraid to tap the altruistic motivations in the team. • Model the way in hosting and leading meetings • Be on the lookout for situations requiring "safety": initially be tentative with opinions • Offer to do real work, like researching best practices • Help the team spot system impacts, unintended consequences • Promote informal learning with SUCCES • Question whether there is excessive risk aversion • Look at change as a strategic challenge • If no one else will, just start with a question • Be an interface between members of the organization. • Help clarify the purpose of the group – continuously • Encourage discussion about the needs of the group • Contribute your "deep domain knowledge"

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