

# Case Study: Motor Repair

- Example of Team Charter for warranty repair of motor system
- Example of template of team charter
- Reporting template used by team to update management

# A Project Team Charter

**DMAIC**  
**Step B**

### Project Goals

- Deliver Fuzzy Logic Diesel Engine to Underwrite ~ 50% of Fixed Life Applications.
- Deliver Cased-Based Engine (CBE) to learn to Underwrite up to 80% of Fixed Life Applications.
- Leverage to Long Term Care; XXXX model.

### Measurable Customer CTQ's

- 50% Automated Risk Classification by Jun 2002
- Reduce cycle time by 66% (to 14 days)
- Minimum of 25% "touch free" processing of applications
- Capability of handling 15,000 applications per week

### Business Owner/Champion

- Scott M, CTO, GEFA
- Bob N, SVP, GEFA Lynchburg Ops

### Core Team

- |           |      |            |      |
|-----------|------|------------|------|
| • Dick M  | 95%  | • Angie P  | 100% |
| • Piero B | 83%  | • Raj S    | 75%  |
| • Marc P  | 100% | • Tony M   | 75%  |
| • Dan Y   | 100% | • Hunter A | 65%  |

### Key Technologies

- Fuzzy Logic, Case-Based Reasoning, Dynamic System Simulations, Risk Analytics, Dynamic Data Flow IT, Business Physics

### Deliverables

#### Milestones

	<u>Orig. Date</u>	<u>Exp* Date</u>
1 – Fuzzy Logic Engine: on-line	6/1	11/1
2 – CBE: on-line HTN certification	9/4	3/31
3 – CBE: on-line DEP certification	10/1	6/30
4 – FLE for Long Term Care: off – line	9/15	4/30
5 – FLE for LTC: on – line	11/4	10/15
6 – FLE for LTC: on-line	3//31	11/15

### Funding

- |                 |          |
|-----------------|----------|
| • CEO Program   | \$XXXXXK |
| • GEFA Contract | \$ YYYYK |

### Risks / Issues

- Test Plan for on-line certification of IT system
- rules engine capabilities
- Integration of Dynamic Data Flow & Engines
- XXX data set coverage
- Data Quality in Integrated System
- Availability of Data Input System

## CONTEXT / ISSUES

- What is the issue and why is it important to tackle now?
- What is the purpose, the business reason for choosing this project?
- What are the anticipated benefits to customers and staff from the project?
- What performance measure needs to improve?
- Have you been to the Gemba?
- What process/program/customer data do you have regarding the problem (time, cost, quality )? Show facts and processes visually using charts, graphs, maps, etc.
- When did the problem start?
- Where is the problem occurring?
- What is the extent or magnitude of the problem?

## GOALS

- What specific, measurable, attainable, relevant, time-bound results do you want or need to accomplish?
- Show visually how much, by when, and with what impact.
- NOTE: Be careful not to state a solution as a goal!

## SCOPE (IN BOUNDS)

- What is the first step and last step in the process?
- What is the program and geographic area?
- NOTE: Be mindful of what you can realistically accomplish with available resources and time.

## SCOPE (OUT OF BOUNDS)

- What is off the table due to resources?
- What are the givens or assumptions for the project?
- Record out of scope issues in a "Parking Lot"

## CUSTOMERS/STAKEHOLDER S

- Who is the end-user customer?
- Who are other stakeholders who have a role or interest in the success of the process?

## TEAM MEMBERS

- Team Leader:
- Team Members:

## CUSTOMER REQUIREMENTS (CTQ)

- What do customers/stakeholders expect and require from the process? What are their critical to quality (CTQ) requirements?
- What legal requirements (laws, rules) govern the process?

## VISION OF SUCCESS

- What outcomes or results do you want to see?
- What does success look like for our customer?
- What does success look like for other stakeholders (staff, partners)?

## PROJECT MILESTONES & SCHEDULE

Project Milestones	Owner	Proposed Date	Actual Date
1. Set project scope and goals (prepare Project Charter, engage team, collect data)	Sponsor/Team Leader, Facilitator		
2. Understand the current situation	Facilitator/ Team		
3. Analyze the current situation (root causes)	Facilitator/ Team		
4. Define a vision of success	Facilitator/ Team		
5. Generate, evaluate and select improvements	Team/ Sponsor		
6. Implement changes and make adjustments	Team Leader/ Staff		
7. Measure performance	Sponsor/Team Leader		
8. Document standard work and lessons learned	Team		
9. Sustain improvement	Team Leader/Process Owner		

## RESOURCES

- Time commitment for a 4 day Kaizen, excluding time to implement changes: Sponsor (6-10 hrs.); Team Leader (40 hrs.); Team Members (32 hrs.); Facilitator (40-50 hrs.)
- External Resources:
- Equipment:
- Materials: