Field training documentation

Lean Wisconsin

Background

As part of this activity, staff worked to move from Microsoft Word to InfoPath forms for field training documentation. Information would now be stored in SharePoint instead of ABSORB. It would also change the process to have the trainee fill out the InfoPath General Training Record directly, instead of the trainer.

Problem Statement

The current process for completing field training documentation is tedious and time consuming. Documentation needs to be completed by the trainer and takes up to 95 minutes for each occurrence. The processing flow includes five main steps. Current documentation forms have up to a 40% error rate, and data can't be exported and tracked. There are opportunities to reduce steps, repurpose staff hours, reduce errors and make data more useable.

Outcome

After making the change, field training documentation now has quicker and less steps. Mandatory fields ensure all information is completed. Calendar boxes, SharePoint People Finder and drop downs create consistency. Reports allow staff to filter results. It also creates and tracks information needed to fill out additional division forms, including Appendix 2.3 MFRPS. The new process takes the trainee five minutes per occurrence. In the first quarter of 2018, there were 183 occurrences. This means that in one year, there would be 732 occurrences, taking a total of 61 hours. This allows 1,098 hours of staff time to be repurposed annually. The new process includes only two steps, saving three steps.

Results

Metric Name	Before	After	Improvement	% Improved
Annual hours required	1,159	61	1,098	95
Annual current cost in dollars				
Annual future cost in dollars				
Number of steps in process	5	2	3	60
Average process lead time in days				
Percentage who are satisfied				

Cost to implement: $ 0

One-time cost savings: $0

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