



Performance = Organizational Excellence



Pinnacle Enterprise Group (Pinnacle) is a process engineering, management system implementation, and organizational development firm. **Pinnacle** is a pioneer of the customized accelerated management system implementation and registration approach. While the industry norm for implementation of an **ISO 9001** and **ISO 14001** based management systems is still 12 months,

Pinnacle assists organizations through the process in an average of 3-6 months, with better overall management system performance.

The key to **Pinnacle's** success is a commitment to the knowledge transfer philosophy and our methodology. We see a relationship between **ISO 9001** and **ISO 14001** based standards, **Lean** and **Six Sigma** tools and methods, regulatory and/or industry requirements, customer satisfaction and perception, and organizational skills development. The rational combination, integration, and application of these elements will result in a **Lean QMS[®]** that is compliant with any **ISO 9001** and **ISO 14001** based standard. But more importantly, when the **Lean QMS[®]** is implemented properly, the resulting business operating system (BOS) will give you:

- rationalized processes and procedures,
- improved and consistent departmental interaction,
- unfettered material and information flow,
- optimized value streams,
- the ability to identify and solve systemic process and product problems,
- improved customer satisfaction and loyalty, and
- the platform for continual improvement and evolution of your BOS.



Pinnacle's approach is more than just a Quality or Environmental Management System standard compliance program, or a Lean tools training program, or a Six Sigma Black Belt curriculum. Simply addressing generic requirements and blindly learning advanced quality tools does little to move your organization toward a high performance BOS. Truly maximizing the value of your BOS mandates an integrated **Lean QMS[®]** approach, a sustained mind set, and proficiency that must be acquired through "knowledge transfer." For the long-term viability of an organization, the rationalization and integration of the business, quality, regulatory, and technical processes must be permanent. Simply put, you and your staff must receive the skills and knowledge needed to **take ownership of the process** and have the ability to maintain and improve it into the future.

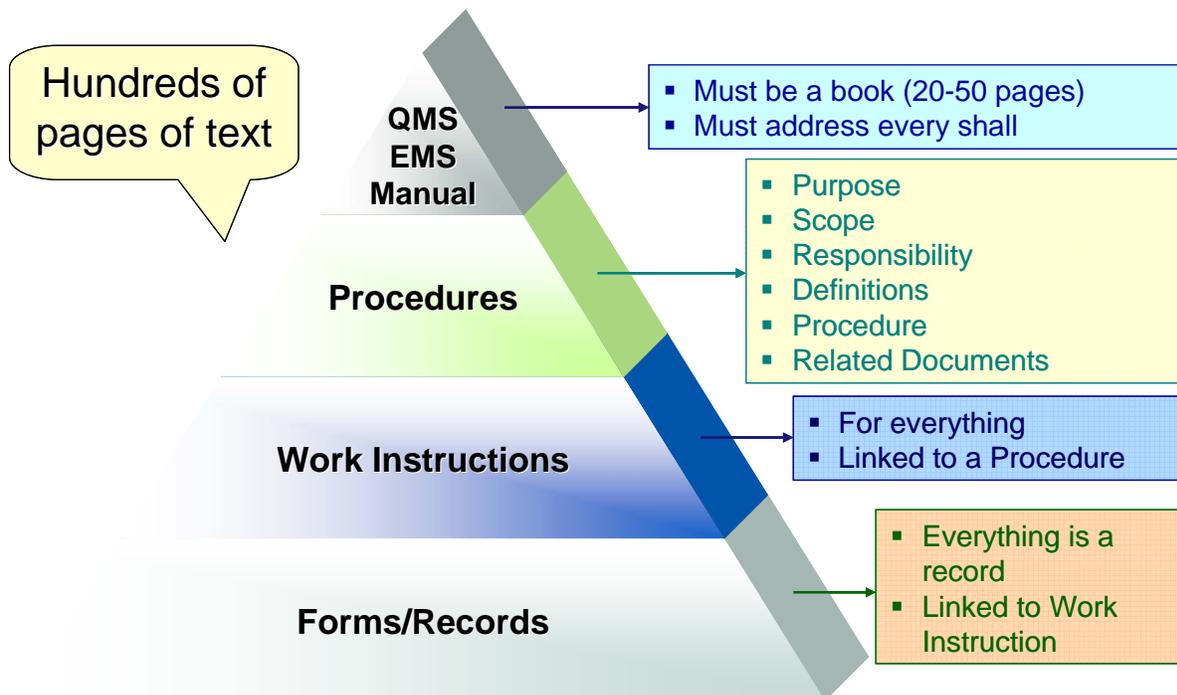
Pinnacle is committed to providing the highest quality, custom tailored, and affordable training and consulting services to help organization along the road to organizational excellence.

Lean QMS® Documentation – Overview

ISO 9001:2000 based standards require that, at a minimum, your Management System be rationalized and articulated by:

1. A **Quality Manual**,
2. **6 to 7 Documented Procedures** (Pinnacle refers to these as Support Processes), and
3. At least **21 Records**.

Unfortunately, these requirements are traditionally misunderstood resulting in the following false paradigm being applied to a Management System:

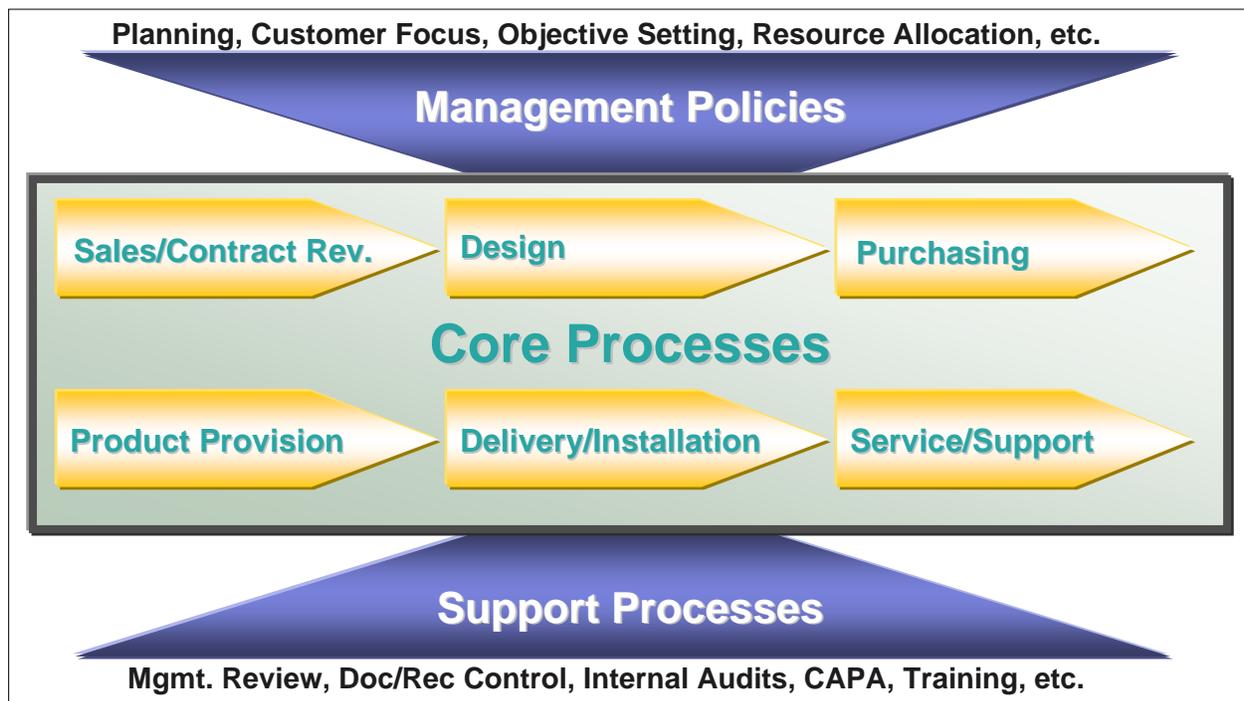


While this paradigm may be appropriate for describing a documentation structure, companies rarely organize their business operating system (BOS) in this way. In fact, this paradigm is typically the cause of over documentation. The resulting paperwork glut quickly becomes “shelf-ware” and a burden to the BOS.

Pinnacle developed a realistic, practical, and process-based model than consists of three major components:

1. **Management Policies or Processes (MP)** Policies or processes that set the mission, vision, and direction of the organization.
2. **Support Processes (SP)** Processes that facilitate, monitor, control, and improve the BOS, but do not directly impact the product/service or the customer.
3. **Core Processes (CP)** A set of sequenced and interrelated processes defining and controlling all product and service realization activities. These are processes directly impact the product/service and/or the customer.

The figure below illustrates the model and the relationship of these components:



In turn, these three components are supported by:

4. **Work Instructions (WI)** Specific or individual task level instructions that support the fulfillment of Core or Support Processes.
5. **Forms/Records (F)** Standardized forms that, when completed, collect information that is retained as records. A form becomes a record when it is written on or completed. When forms contain enough task level instructions they can replace Work Instructions.



This process model is the foundation for **Pinnacle's Lean QMS[®]** methodology. The resulting management system documentation exceeds the requirements of any ISO 9001:2000 based standard while laying the foundation for a rational, practical, and **Lean BOS[®]**.

Lean QMS[®] Documentation – Process Mapping

The success and value of the BOS depends to a large degree upon consistency of best practice. Without consistency it is impossible to understand processes across functional and geographic boundaries, make accurate projections, benefit from past experience, establish reasonable goals and plans, and make improvements to systems. Consistency of best practice allows you to analyze your systems and determine their effectiveness. You can then make targeted changes in order to improve efficiency, decrease errors, and implement other improvements.

To achieve this consistency the first step is to capture your current practices. Once you have current practices properly defined and documented you can train people, keep records, and evaluate your systems for best practices. When improvements are devised the process starts again with documentation. Consequently, your management system relies on documentation. Furthermore, it relies upon the quality of the documentation. Documents that are hard to read or inaccessible are poor quality documents and will not serve to bolster consistency and adoption of best practices. Documents must be easy to read, easy to understand, and readily available.

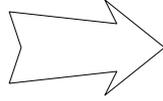
Text documents do not serve a management system well. In general, they are long, confusing, unable to show parallel processes, unavailable (in binders), and require strong reading comprehension and retention skills. These issues are magnified in multinational companies that must also contend with language and cultural differences.

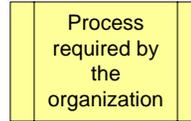
Process Maps on the other hand can be 1/5 the length, show a greater amount of detail and complexity, are easy to follow, and readily available (posted on walls, accessed via intranet, etc.). Process Maps play on the strength of the brain to recognize and recall patterns. They can take a very complex system and make it a simple step-by-step operation that is visually intuitive. Inconsistencies and open loop processes are easily identified when placed in a graphical model. The Process Maps are then easily modified and can be used to train people quickly so you can introduce improvements in a matter of minutes. Having the ability to develop and maintain process mapped documentation as your organization evolves is a key component of the **Lean QMS[®]** methodology.

On the following pages you will find examples of process maps as well as a key to **Pinnacle's** process mapping symbols. We hope you find this information and examples helpful. Please don't hesitate to contact us to explore how the **Lean QMS[®]** can help improve your organization's BOS.

 Use to start a process as well as show all inputs to a process

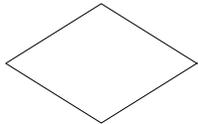
 Predefined Process or "Football Field": Use to represent another SP or CP process map.



 Process required by the organization

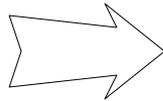
 Process required by the standard

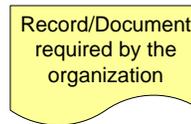
 Use to depict the core action steps of each process. This is where the action is.

 Use to depict decision point (e.g. yes or no, good or bad, internal or external, etc.)



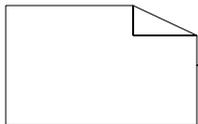
 Use to show any type of document (e.g. form, record, specification, standard, etc.)

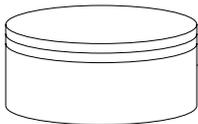


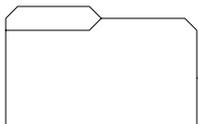
 Record/Document required by the organization

 Record/Document required by the standard

 External Forms/Records

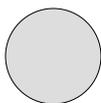
 Work Instruction: Used to represent a task level instruction that supports the fulfillment of the Core or Support Process

 Use to depict electronic forms, documents, records, storage, application (e.g., ERP, MRP, CRM, etc.), or database.

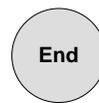
 Used to show a physical file for hardcopy storage

 Use to designate Quality/Environmental Objectives, goals/targets, measurables, and metrics within a process map.

 Used to show dialog when the process symbol requires more verbiage than the block allows for e.g. can add: for example, any additional comments and information to support the activity

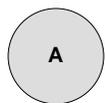
 Process Terminator: Use to show the end of a process, link to next page of process map, or link to another step of the process..



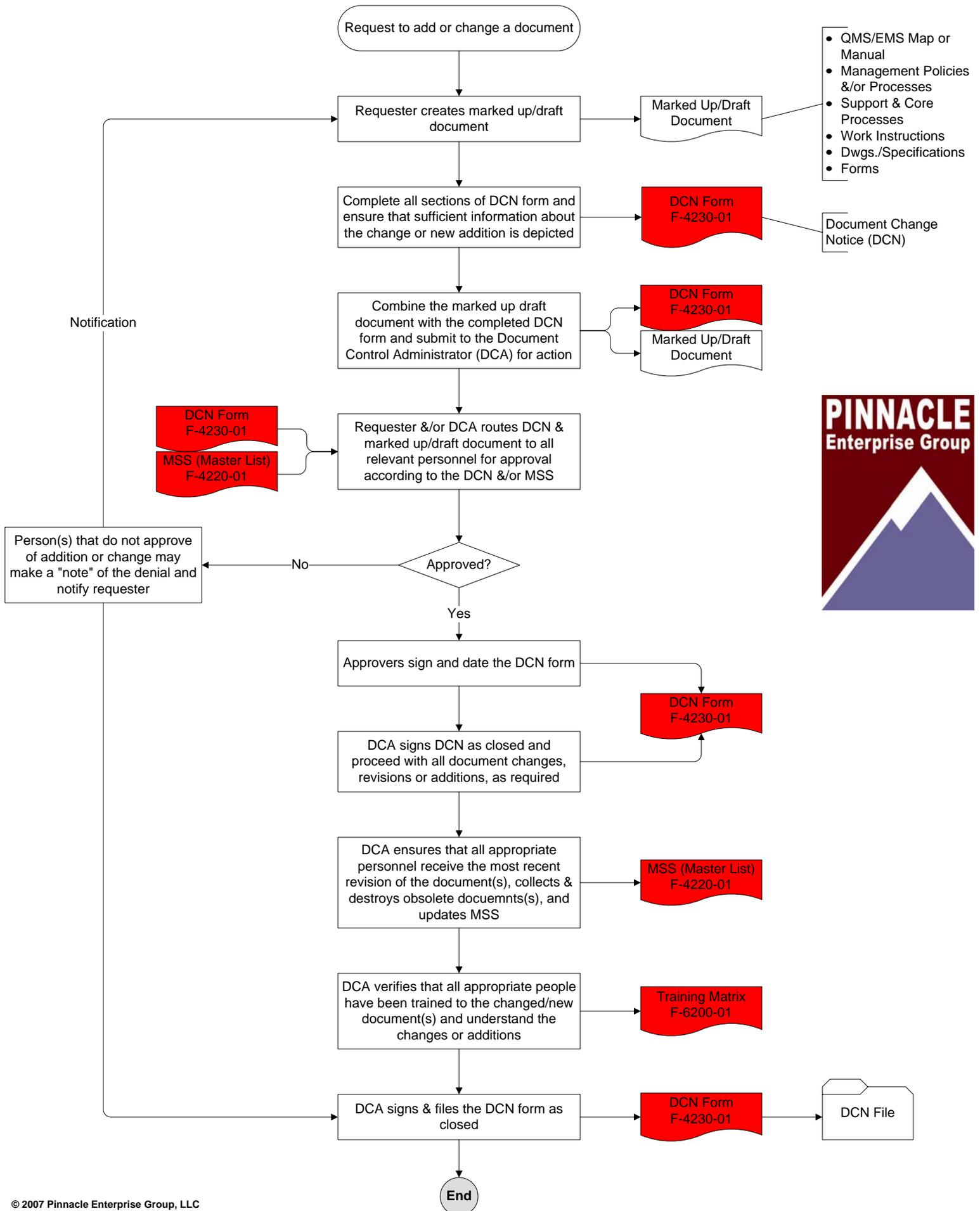
 End

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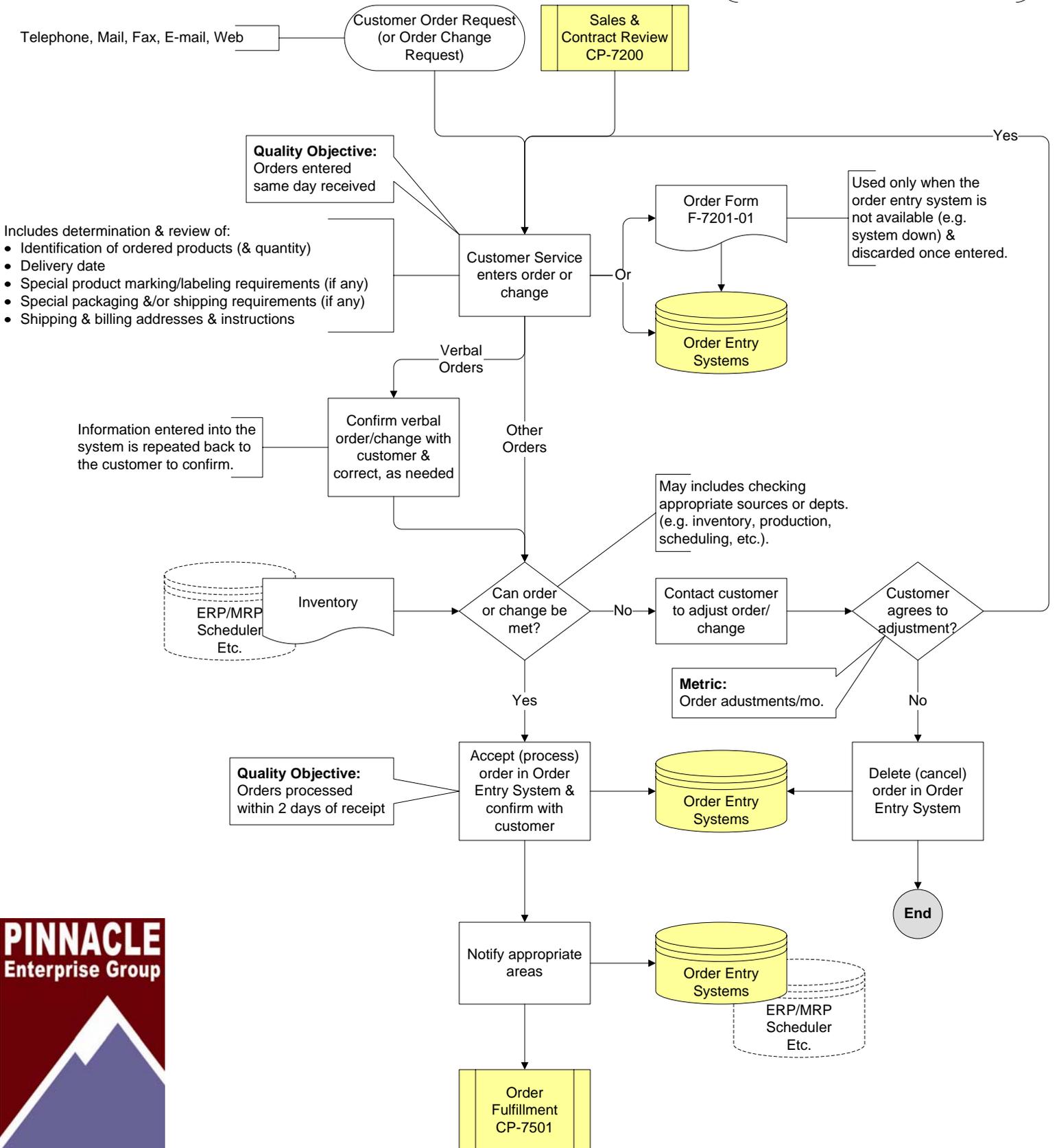




Quality Objective:

- Orders entered same day received
- Orders processed within 2 days of receipt

Metric:
Order adjustments/mo.



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