SALES PDCA CANVAS

Team Name: **Sales Cycle ID:**

S: Select the initial Problem Perception
What is the problem to be solved? Describe the problem, issue or need that your project is intended to address.

A: Analyze the current process
Review the Critical to Quality (CTQ) issues facing this value stream and how they apply to this cycle. What should be involved in this step? Have customers' expectations and specifications been examined and documented? What are the points of concern?

L: Locate the people who understand the process
List the members of your team, including position and role they will play.

Name   Position   Role

E: Empower the Team
The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team (Team Charter) to accomplish process.

S: Select the Improvement
The team must fully understand not only the CTQ's of the overall Value Stream but the CTQ's of this particular cycle. Define the Gap that is to be completed in this cycle.

P: Plan
What are the detailed steps you will take to make an improvement?
Clarify the problem, breaking down customer decision process and people involve.
Locate the point of concern or cause through Who, What, Where, When
Identify root cause and verify with data.
Develop countermeasures utilizing user stories and place on Kanban board, prioritize.

D: Do the plan
Build Project Plan or iteration through user stories. Use a Kanban board to visualize work flow and who is doing what. Pull tasks into doing as needed. Use daily stand-ups or Andon to signify problems or hang-ups.

C: Check (Study) to see if an improvement was made
Did the plan work? Collect and analyze data to demonstrate if gap was closed or not. Determine which changes worked and which did not.

A: Act (Adjust)
Has Gap been closed? Has Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer can be handed off to next stage. Document the steps that will be taken to for this and complete hand off.

SALES SDCA CANVAS

Team Name: **Sales Cycle ID:**

S: State the standard
Standard work is the best practice for a given process. It should provide a routine for consistent delivery of work and to do this it must be stated clearly and provide a clear line of sight to the Value Stream Manager, Team Coordinator and Team Members.

A: Agree on the method.
What is the method you are going to use for the documentation of standard work. It will provides the necessary components of a reporting system that ensures the work is being done as expected. What are you currently doing?

L: Locate the people who will be on the team.
List the members of your team, including position and role they will play.

Name   Position   Role

E: Empower the Team
The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team to accomplish process.

S: Select the Team Goals of the Project
The team must fully understand the exact goals and outcomes that are expected for this particular cycle.

S: Standard
Review the method.
Document the actions needed and who will complete each action step.
Clarify the resources needed for each action step.
Decide on what constitutes variation and required action.

D: Do the plan
Perform to the standard. Use a Kanban board or other means of visualization to demonstrate work flow and problems encountered.

C: Check (Study) to see if an improvement was made
Did the plan work? Collect and analyze data to demonstrate if standard was done. Determine what changes are needed for improvement.

A: Act (Adjust)
Is the standard being completed. Has Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer can be handed off to next stage/cycle Document the steps that will be taken to for this and complete hand off.

SALES EDCA CANVAS

Team Name: **Sales Cycle ID:**

Sense-making: Give meaning to experience.
Create a point of view statement that defines the efforts to understand connections which can be among people, places, and events. Understanding the problem space is many times as important as understanding the user.

A: Analyze the user
Define and study the user to develop insights as a starting point for defining value. Review and focus on the service period to determine the pre-service, service and post service durations.

L: Locate the people who understand the user and the needs
List the members of your team, including position and role they will play.

Name   Position   Role

E: Empower the Team
The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team (Team Charter) to accomplish process.

S: Select a limited set of needs you are designing for—your user.
Create user stories based on this set of needs.

E: Explore
Visualization: using imagery to envision possible future conditions
Journey Mapping: assessing the existing experience through the customer's eyes
Value Chain Analysis: assessing the current value chain that supports the customer's journey

D: Do the plan
Concept Development: assembling innovative elements into a coherent alternative solution that can be explored and evaluated
Mind Mapping: generating insights from exploration activities and using those to create design criteria
Brainstorming: generating new alternatives to the existing business model
Concept Development: assembling innovative elements into a coherent alternative solution that can be explored and evaluated

C: Check (Study) to see if an improvement was made
Assumption Testing: isolating and testing the key assumptions that will drive success or failure of a concept
Rapid Prototyping: expressing a new concept in a tangible form for exploration, testing, and refinement
Customer Co-Creation: enrolling customers to participate in creating the solution that best meets their needs

A: Act (Adjust)
Has exploratory needs been completed? If not, reconsider. If it has continue improvement with a **Learning Launch (PDCA)** creating an affordable experiment that lets customers experience the new solution over an extended period of time, so you can test key assumptions with market data. Document the steps that will be taken to for this and complete hand off.

SALES CAP-Do CANVAS

Team Name: **Sales Cycle ID:**

Sense-making: Give meaning to experience.
Create a point of view statement that defines the efforts to understand connections which can be among people, places, and events. Understanding the problem space is many times as important as understanding the user.

A: Analyze the user
Define and study the user to develop insights as a starting point for defining value. Review and focus on the service period to determine the pre-service, service and post service durations.

L: Locate the people who understand the user and the needs
List the members of your team, including position and role they will play.

Name   Position   Role

E: Empower the Team
The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team (Team Charter) to accomplish process.

S: Select a limited set of needs you are designing for—your user.
Create user stories based on this set of needs.

C: Check
List what we are presently doing – Why, What, How
Share and document experiences in the SALES Team
Review organizational structural forces
List what we are certain and uncertain about
Value Chain Analysis: assess the current value chain that supports the customer's journey

A: Act (Adjust)
Confirm with Customers/Markets key certainties and uncertainties
Observe, Think and Feel: Planning is not done in isolation.
Visit customers, go to Gemba for planning.
Write stories with customers of existing events
Write stories of customers of future events/scenarios

P: Pause (Presencing)
Are the stories clear, concise and relevant?
Reflection – The stories that you created in Check match with stories in Act (Divergent views are important)
Isolate and group key assumptions
Seek to understand

P: Plan
Act and Engage: look and generate new alternatives
Visualization: use imagery to envision possible future conditions
Concept Development: assemble innovative elements into a coherent alternative solution that can be explored and evaluated
Group and make decisions on what:
⇒ To Start
⇒ To Stop
⇒ To do Differently
⇒ Not to Change

D: Do
Enact our Decisions
⇒ Create Standard Work for what not to change
⇒ Create Plan to do different (SOAR/SWOT)
⇒ Create Plan to Start Something New
⇒ Stop what we don't want to do
Customer Co-Creation: enroll customers to participate in creating a solution that best meets their needs
Analyze and optimize: isolating and testing the key assumptions that will drive success or failure of a concept
Rapid Prototyping: express new concepts in a tangible form for exploration, testing, and refinement
Relate and Influence: No matter how good of an idea you have, the key is still in gaining acceptance of others, build constituency.