



Amazing Traditions, LLC

Do good. Make a difference. Fulfill your mission.

**"Give me a lever long enough and I alone
can move the world"**

-Archimedes

**What are your goals for your organization?
Do you have the systems and
processes in place to accomplish them most effectively?**

At Amazing Traditions, LLC, we specialize in helping for-profits and nonprofits achieve greater impact with their precious — and often limited — human and technology resources.

The Amazing Traditions approach draws on a unique combination of Six Sigma and Malcom Baldrige principles and measures first to assess current levels of performance and then to suggest cost-effective and sustainable enhancements. Throughout, our entire focus is tailored specifically to the goals your leadership team has for your organization...to helping you reach your amazing potential!

- Visionary leadership
- Customer-focused excellence
- Valuing people
- Organizational learning & agility
- Societal responsibility
- Focus on success
- Managing for innovation
- Management by fact
- System perspective
- Ethics and transparency
- Delivering value and results

Using core values and concepts to create the foundation for integrating key performance and operational requirements within a results-oriented framework that creates a basis for action, feedback, and on-going success.

**Are you ready to
challenge the status quo?**

**Contact us today to
schedule your assessment!
816.260.1067**

info@amazingtraditions.com

OUR SERVICES

Our customers are our partners at every step in the process to ensure that solutions are right-sized to provide sustainable and value added solutions to increase capital to grow the business.

We offer flat rate assessments that look at cost effective solutions to make your organization operationally lean. We value the relationships with our customers and want you to know we operate with integrity!

Do you have a project that just never seems to end? The requirements keep changing and the schedule and costs are out of control? We specialize in bringing out of control projects back to focus and deliver the intended results to bring value to your business.

TECHNOLOGY DEVELOPMENT

Need a custom development solution? We offer low cost solutions with the small business model in mind. Fast. Affordable. Easy to Implement.

COST AND RISK OPTIMIZATION

Risk Management through optimization. What is risk and how does it relate to business sustainability? Risk management is simply optimization of making the most of known risks.

STRATEGIC TO TACTICAL PLANNING


Developing strategies to guide small companies through growth by focusing on vital areas of operations, including marketing, partnerships and employee development.

PERFORMANCE & METRICS MANAGEMENT

Obtain knowledge, tools and connections that work for you. Identify market opportunities and make informed decisions so you can build wealth.

Please get in touch. We want to help you find the hidden efficiencies and funds in your organization.

www.amazingtraditions.com



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Amazing Traditions, LLC

Questions & Answers

with
Kerri VanMeveren, Founder & CEO



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Visit us on the web:
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What are your goals for your organization?

Do you have the systems and processes in place to accomplish them most effectively?

1. What challenges do you see many non-profits facing from operational and efficiency standpoints?

They are often so laser focused on their mission, but often forget that they still need to run their “business”. This means making informed decisions about how they run their nonprofit on a daily, weekly and an annual basis. A “free” or greatly discounted service or “product” may not really be free if it doesn’t take the big picture in mind of what supports the 3 to 5 year plan or longer. On the surface, that sounds like a great thing. Hey- It’s free or greatly discounted, it solves an immediate problem. So, what IS the problem? It’s critical that every business decision be aligned with the strategic plan. Will this decision support growth, will it increase labor time for employees, and will it make it easier or more difficult to access information that allows an organization to be **proactive** vs reactive?

2. How do these challenges impact these organizations and their ability to fulfill their missions?

Increased Efficiency — Nonprofits are legendary for their ability to operate with meager budgets and small staffs. Therefore, when Lean Six Sigma improvements help a nonprofit do more work with the same amount of people and resources, the gains have an even greater impact than they would in a corporate setting.

Improved Customer Service — Lean Six Sigma also yields measurable benefits where it matters most to nonprofits, helping more clients. Moving multiple sources of data to a single platform reducing reworks and ease of reporting. A streamlined filing system can help caseworkers spend less time processing paperwork and give them more time to lead projects and work directly with clients. Animal shelters that simplify pet adoption programs, for instance, can place more pets into better homes.

Nonprofit organizations are an integral part of our communities, providing a vast array of services, fostering civic participation, and building social cohesion. Although operating models and economic drivers vary across the nonprofit sector, unlike for-profits the drive of competition may not provide the impetus for organizational change models such as process improvement. Nevertheless, in order for any organization to be efficient and effective, it is generally necessary to strive for the development of processes that track and document why organizational changes are necessary; why the changes mark improvement within the organization; and how to continuously refine and re-evaluate what the organization is doing to achieve its mission.

3. How does your approach/process/service help address these pain points? Describe the Six Sigma and Baldrige approach and what that means.

Lean Six Sigma is a methodology that focuses on continuous process improvement. We start by analyzing the organization, its mission and its objectives. This includes developing a clear picture of the end clients, what they expect of the nonprofit and how well their needs are currently being served. Lean Six Sigma calls this obtaining the voice of the customer.

Aligning Lean Six Sigma improvement efforts with the voice of the customer helps ensure that your team will make a difference where it matters most to the customer.

By challenging yourself with the questions that make up the Criteria for Performance Excellence, you explore how you are accomplishing what is important to your organization. The questions represent seven critical aspects of managing and performing as an organization:

- | | | |
|---------------|---|---------------|
| 1. Leadership | 4. Measurement, analysis, and knowledge | 6. Operations |
| 2. Strategy | management | 7. Results |
| 3. Customers | 5. Workforce | |

A focus on core values and concepts.

Malcom Baldrige is based on a set of beliefs and behaviors. These core values and concepts are the foundation for integrating key performance and operational requirements within a results-oriented framework that creates a basis for action, feedback, and ongoing success:

- Visionary leadership
- Customer-focused excellence
- Valuing people
- Organizational learning & agility
- Societal responsibility
- Focus on success
- Managing for innovation
- Management by fact
- System perspective
- Ethics and transparency
- Delivering value and results

A focus on processes. Processes are the methods your organization uses to accomplish its work. The Malcom Baldrige framework helps you assess and improve your processes along four dimensions:

1. **Approach:** designing and selecting effective processes, methods, and measures
2. **Deployment:** implementing your approach consistently across the organization
3. **Learning:** assessing your progress and capturing new knowledge, including looking for opportunities for improvement and innovation
4. **Integration:** aligning your approach with your organization's needs; ensuring that your measures, information, and improvement systems complement each other across processes and work units; and harmonizing processes and operations across your organization to achieve key organization-wide goals.

Any organization that uses a repeatable process can apply Lean Six Sigma to become more efficient and productive. Nonprofit organizations routinely use repeatable processes that could be streamlined and improved with Lean Six Sigma, such as:

- Updating and managing client case files
- Caring for and feeding animals in a shelter
- Mobilizing resources for disaster relief
- Streamlining workflow processes
- Deploying community educational programs
- Maintaining financial records and budgets

Nonprofit employees are right to make improving the lives of people and promoting a worthy cause their highest priority. However, they must also acknowledge that the efficiency and savings that Lean Six Sigma creates can help them do more good and impact more people with the resources at their disposal. When employees understand that creating efficient processes can advance their mission, they may be more willing to accept the Lean Six Sigma methodology.

4. Once you've done your evaluation and made your recommendations, what kind of solutions are nonprofits likely to see?

- Reduction in non-added value processes
- Create high-impact nonprofits
- Measuring the value of an IT investment
- Databases and Analytics (Business Intelligence)
- Business and Technology Planning
- IT Support and Services

For example:

Eliminating wasteful tasks and actions can benefit both for-profit organizations and non-profits. For example, by using a better tool to keep track of donor lists, information becomes more handy and accessible for the charity to reach out to a potential donor. This will free up time for staff members to work on something else. Another example would be to use an improved recruitment process so charities are able to hire the best

Lean Six Sigma concepts allow the organization to identify the activities that are sapping their resources. Once these activities are eliminated, the remaining tasks in the process provide a better return on investment, making the NFP more resourceful.

5. What are the example benefits to the organization?

Greater Efficiency with Minimal Staff - Nonprofits have relatively fewer resources compared to their corporate counterparts. They often operate on limited budgets with minimal staff. However, Six Sigma effectively uses the tools of defining, measuring, analyzing, improving and controlling to streamline and improve operations.

Streamlining Increases Customer Service and Revenue- helping nonprofits increase revenue and streamline operations, enabling some to take on more projects or clients.

6. How difficult/time consuming is the process?

We are always mindful of the many hats worn by everyone and work closely with clients to minimize impact so they can continue meeting the needs of the community they serve.

The assessment typically involves approximately 40 contact hours with key stakeholders within the organization spread out over 2 to 3 weeks. There are about another 40 hours spent analyzing the information obtained during this time resulting in an outcome based assessment.

- Conduct the assessment
- Analyzing your assessment results
 - ◆ Applying the Amazing Traditions methodology (Malcom Baldrige & Six Sigma)
- Deriving meaning from the assessment results
 - ◆ Digging deeper into the results with quantifiable and qualitative measurements
- Discussing your results
 - ◆ Alignment of current state with future state
- Determining actions to take
 - ◆ Actions taken are truly at the heart of the assessment process, as they provide the guidance for next steps to start the execution strategy

7. How do you overcome internal objections? The initial step is to have a discovery process to understand their short and long term objectives.

Typical objections include:

- a. We don't have time to take on any projects they can't envision the same as the programs that serve their clients.
- b. We can't afford the cost of projects they can't envision ((see Question #1)
- c. It all seems too complicated and have difficulty seeing the value
- d. Fear of the unknown or failure.
- e. We did something like this a long time ago and it didn't go well.

8. How expensive is this?

The typical approach involves doing an initial assessment, however, if an organization has already identified a specific need whether it be regulatory or a change in strategic direction, we can focus on addressing that need to provide them outcomes that support their objectives.

For nonprofits that aren't sure where they should start and want to have the biggest "bang for their buck", we take a look at the big picture and then zero in on the areas that are contributing to the mis-alignment of their strategic goals. There are different levels of assessments available. The standard assessment is \$5,000.

A mini assessment is also available that is tailored to looking at just one specific aspect of the nonprofit. I don't usually recommend this as it can lead overlooking key critical components that could affect the execution of any recommendations made. However, there can be situations where this is appropriate and is assessed on a case by case basis. I will not take on a client if I don't think they are in a position to commit the financial or time considerations needed to execute recommendations from an assessment.

9. How do I cost justify your services?

Achieving high impact is not just about building a great organization and then scaling it up site by site, or dollar by dollar.

To paraphrase Archimedes, "Give me a lever long enough and I alone can move the world." These groups use the power of leverage to create change. In physics, leverage is defined as the mechanical advantage gained from using a lever. In business, it means using a proportionately small initial investment to gain a high return. The concept of leverage captures exactly what high-impact nonprofits do. Like a man lifting a boulder three times his weight with a lever and fulcrum, these nonprofits are able to achieve greater social change than their mere size or structure would suggest.

We work with nonprofits to change their business processes and become more sustainable.

10. What is the role of technology in your solutions?

We strongly believe technology should be considered a tool and not a fix in any organization. Too often organizations use technology to solve a specific problem without understanding the long term implications.

It's important to understand the difference between efficiency and effectiveness. Establish limits to repeated tasks. Fix the cause of the problem, don't just put a band-aid on it.

Whatever it is, find the source of the problem and fix it, instead of just treating the symptom. A good example for this could be that you have a problem keeping sustained levels of energy throughout the day. So what do you do? Have another cup of coffee, maybe a rockstar, or redbull. But what's really causing your lack of energy, is it not getting enough sleep at night? Is your diet out of balance? Whatever the cause is, treat it from the source. This might require some maintenance, but when we find permanent answers to our problems instead of quick fixes, we spend less time worrying about them and free up a lot of wasted energy.

11. Do you help with implementation of your recommendations?

We absolutely are a part of implementing the recommendations. An organization's response time to internal or external challenges can affect its survival.

Amazing Traditions approach is about making decisions based on facts. It's the tools, processes and structures are about finding the facts in all the data, and using analysis on hard truth to form knowledge. Most human decisions are irrational and automatic and most business decisions are based on politics, perceptions and/or passivity.

Eliminating wasteful tasks and actions can benefit both for-profit organizations and non-profits. For example, by using a better tool to keep track of donor lists, information becomes more handy and accessible for the charity to reach out to a potential donor. This will free up time for staff members to work on something else. Another example would be to use an improved recruitment process so charities are able to hire the best candidate for the position. The benefits are extensive.

Lean Six Sigma concepts allow the organization to identify the activities that are sapping their resources. Once these activities are eliminated, the remaining tasks in the process provide a better return on investment, making the NFP more resourceful.

12. I don't have time now...how am I going to make time for this whole new thing?

Efficiency is being able to do things really well, in a timely manner, with as little resources as possible. Or with only the necessary means, it's clean, and speedy. But you can be clean, fast and always on time while going nowhere. That is, if you're really efficient at creating a 100 folders and rules for all your email and having them all sorted properly and compiled into a nice spreadsheet, that's great. Is that moving you closer to your goals? Just because you do something efficiently, doesn't make it important. Effectiveness however has to do with results. How capable your are of achieving a desired result. Realize the difference between being effective and being efficient and you will start to realize what matters and what doesn't.

Parkinson's law states the longer amount of time we're given to complete a task, the bigger we'll make it out to be. If we have 3 months, we need 3 months. If we have 2 weeks, we need every day in that 2 weeks. However, if we need it done the next day, somehow we miraculously are able to accomplish what we wouldn't have thought possible had we been given more time. This is because no matter how much time we have to do something, we'll always find a way to fill that time up, mostly with doing things that aren't important. Give yourself time limits to tasks your results will improve dramatically.

13. How would other nonprofits describe your approach?

WE LISTEN, ADVOCATE and **SERVE** our clients.

We tap into the hidden money to help influence business practices, build long term partnerships based on adding value. We help build networks of nonprofit allies and devoting time and energy to advancing their larger field.

SIX SIGMA AND YOU

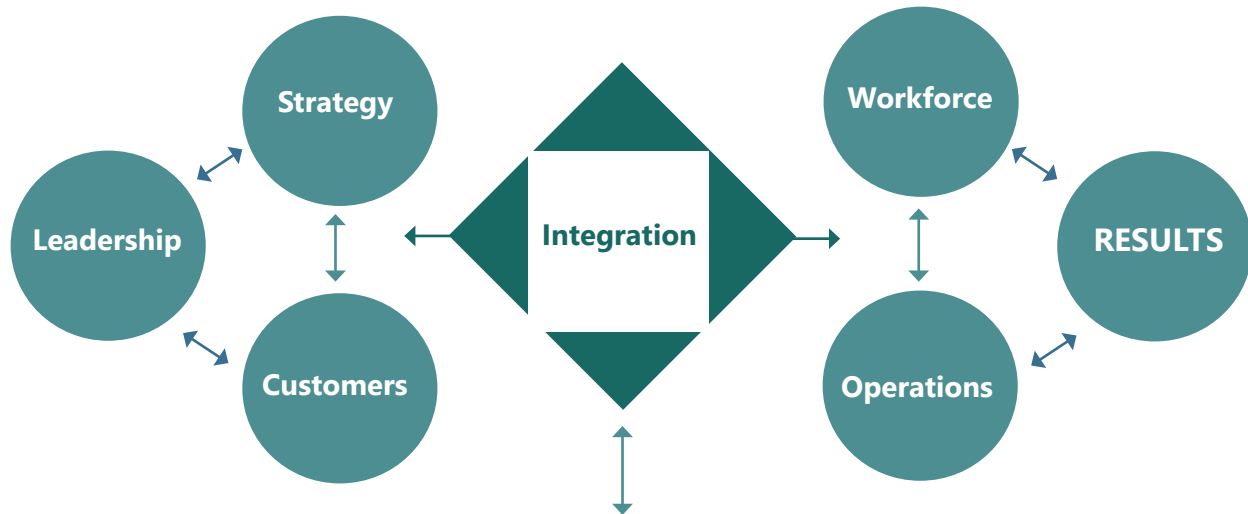
The Classical View of Quality "99% Good" (3.80)

- 20,000 lost articles of mail per hour
- Unsafe drinking water almost 15 minutes each day
- 5,000 incorrect surgical operations per week
- 2 short or long landings at most major airports daily
- 200,000 wrong drug prescriptions each year
- No electricity for almost 7 hours each month

The Six Sigma View of Quality "99.99966% Good" (6)

- 7 lost articles of mail per hour
- One minute of unsafe drinking water every 7 months
- 1.7 incorrect surgical operations per week
- One short or long landing at most major airports every five years
- 68 wrong drug prescriptions each year
- One hour without electricity every 34 years

ORGANIZATIONAL PROFILE



Measurement, Analysis, and Knowledge Management

Core Values and Concepts



Amazing Traditions, LLC