

# Lean Six Sigma Green Belt Mini-Project

## Improving Member Engagement and Retention at Cal Poly's Women In Business Club (WIB)

(7/17/2022 - 8/28/2022)



Women in Business Logo  
The three colors represent  
the following themes:  
BUILD, SUPPORT, &  
EMPOWER.



Women in Business Club  
Pictured above are several  
Women in Business members,  
as they socialize during a WIB  
event on campus.



**Prepared By:**

Zara Budreika  
ITP 303-01

### Project Description:

This project aims to improve WIB member retention and engagement at club meetings throughout the duration of each quarter, to increase the number of meeting attendees who pay membership fees. The improvement of club member retention will both decrease the organization's reliance on external funding and sponsorships, and improve membership benefits.

### Problem Statement and Objective(s):

The current process within Cal Poly's Women in Business club of engaging and retaining the number of meeting attendees as each quarter progresses is unsustainable, which has caused membership dues gathered from new members to decline. As a result, the club has received insufficient funding from membership dues alone and has therefore had to rely more heavily on corporate sponsorships and outreach for financial support for its events, conferences, and catering.

### Sponsoring Organization:

The organization covered, Cal Poly's Women in Business club (WIB), was founded in Spring 2015, and serves as a community for aspiring young women who strive to grow in personal and professional skills. Through weekly club meetings, annual conferences, and member events, WIB provides opportunities for networking and professional skill-building. Although called "Women in Business," the club welcomes and encourages all genders and backgrounds to join. Meeting attendees are encouraged, but not required, to pay yearly membership dues in order to attend the organization's events.

The link to Women in Business's website is as follows: <http://cpwomeninbusiness.com/>.

### Champion/Sponsor:

Abigail Dorman, Women in Business VP of Activities

## Executive Summary

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A fundamental part of operating a successful college club is ensuring that club attendees see value in becoming committed participants of the club. To best retain attendees, effective clubs make an effort to engage attendees through hosting intriguing events, offering valuable resources, and being inclusive towards a variety of individuals. Despite these efforts, many college clubs still struggle with retaining members and convincing them to commit to paying membership dues. Considering the vast quantity of appealing on-campus clubs and organizations, it can be tough to stand out and offer enticing-enough benefits for paying membership fees. Without enough members who pay dues, clubs can become reliant on outside funding and sponsorships.

Cal Poly's Women in Business club, also known as "WIB," has encountered difficulty with its process of engaging and retaining its members through events and outreach. In essence, the quantity of WIB meeting attendees has fluctuated dramatically, with numbers tending to fall after the first few introductory meetings each quarter. As a result, WIB has received insufficient funding from membership dues alone, and has therefore needed to search for external means for funding, such as corporate sponsorships. The hunt for external funding is both time-consuming and tiresome for the organization. Once WIB is able to more effectively attract new paying members and also entice current attendees to commit paying for membership, WIB will receive more internal funding that can be used to give back to its members.

There are a variety of reasons as to why the current engagement and retention of WIB members is problematic. Firstly, at its meetings, the club does not consistently promote paid membership options. As a result, meeting attendees may not even be aware of the option or perks of paying for membership. To address this, WIB must standardize its meetings to include announcing the benefits and perks of being a paid member. In addition, WIB provides special perks to 1st and 2nd-Year students, which may deter other upper grade level students from joining the club. To tackle this, WIB should provide exclusive panels and networking opportunities for upper-grade level members as well. Furthermore, the club may initially appear as lacking in inclusivity, as the club consists primarily of younger students who are Business Administration majors. In other words, the club's outreach has not spanned beyond the Orfalea College of Business, despite the club actually being open to all individuals. Due to this, WIB needs to perform outreach to *all* Cal Poly majors.

To conclude, upon utilizing the DMAIC sequence and Lean Six Sigma methodologies, I uncovered key strategies for increasing the engagement of WIB meeting attendees. Upon performing statistical analysis, I uncovered that upper grade level students, who were either 3rd, 4th, or 5th-year students, felt less satisfied with the club than younger individuals. To handle this, WIB must recruit new club members from all

## Executive Summary (Continued)

grade levels, especially higher grade levels, while also establishing special resources for upper grade level students, such as exclusive networking nights for just them and employers. I also learned that WIB could emphasize its inclusivity policies in a more effective way. I recommend that via each meeting, event, or advertisement of the club, the club should emphasize that it is open to all genders, majors, and backgrounds. Overall, throughout the execution of this project, efforts were made to enhance the span of outreach, structure of meetings, and benefits to being a paid member of the club.

## Recommendations

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- Perform outreach to all Cal Poly majors, to span beyond just students within the Orfalea College of Business (OCOB)
- Create a template for thorough PowerPoint slides that effectively introduce and explain the WIB club, its board members, and membership perks
- Recruit new club members from all grade levels, especially 3rd, 4th, and 5th-year students
- Provide exclusive panels, networking opportunities, and social events for upper-grade level members, to increase their level of satisfaction with the club
- Via promotional efforts, including email, advertise the club's inclusivity for all genders, majors, and backgrounds
- Provide exclusive perks to those who have paid membership dues, including a gift bag at WIB's annual "Defining Her Future" conference
- Put up physical signs to advertise when and where each club meeting is each week
- Periodically offer food at meetings exclusively to paying club members
- Share an WIB alumni success story at the beginning of each meeting to create a reputation of helping to create successful individuals
- Develop intriguing meeting topics and speakers for the upcoming quarter that are based on the interests of students, such as an Interviewing Workshop with a speaker from LinkedIn
- Send out automated reminders to club attendees regarding the opportunity to pay membership dues
- Follow the Standardized process of conducting an engaging and thorough club meeting, which includes a few key sub-steps:
  - While introducing the club, emphasize that the club is open to all genders, majors, and backgrounds
  - Close out meetings by reminding attendees of the benefits and perks of being a paid member
  - Project a QR code on screen for an End-of-Meeting Survey to assess the satisfaction, level of engagement, likes, and dislikes of the meeting's attendees

## Elevator Speech

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Hello, my name is Zara Budreika, and this is my Mini Project for ITP 303.

Lean Six Sigma pertains to using minimal resources to improve a business's products and processes, making those products or processes more efficient, consistent, and customer-centric.

The **organization** I chose was Cal Poly's Women in Business club, or for short, "WIB." WIB is facing an issue with its process of engaging and retaining its club members. As a result, WIB has received insufficient funding from membership dues alone and has had to rely more heavily on external sponsorships.

My key **measure** was the number of students who paid WIB membership dues in 2021-2022, examined by its composition in terms of Year in School and Major of the members. To **analyze** my process, I first identified the underlying causes of member fluctuation, such as special resources being only given to 1st and 2nd-year students, and a lack of emphasis being placed on the club's inclusivity policies. I later performed a regression analysis with the input being "Year in School" and the output being the "Level of Satisfaction With Club."

Since my Regression Analysis showed that upper grade-level students felt less satisfied with WIB, I **improved** the engagement of these specific students through deciding to provide exclusive networking opportunities and social events for them. I also **improved** the execution of WIB meetings through standardizing their process, to include clarifying that WIB is open to all backgrounds.

To conclude, I **learned** that, despite WIB being open to *all* students, the majority of paid members are from business-based backgrounds. So, WIB would be wise to perform more outreach towards students of all majors. Overall, my project prioritized increasing outreach, inclusivity, and standardized meetings to better retain WIB's members.

## TOOL PLAN OUTLINE

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Phase of DMAIC Process	Tools
<b>Define</b>	1) Project Charter 2) Critical to Quality Characteristics (CTQC) Tree Diagram
<b>Measure</b>	3) Cause and Effect Matrix 4) Pie Charts
<b>Analyze</b>	5) Fishbone Diagram 6) Simple Linear Regression (Statistical Tool)
<b>Improve</b>	7) Brainstorming 8) Corrective Action Matrix
<b>Control</b>	9) Standard Work 10) Project Closeout

## DEFINE

### Tool 1: Project Charter

**WHY:** The Project Charter is a crucial tool for conducting a continuous improvement project, as it outlines the specific goals of the project and helps to provide structure to guide the entire scope and execution of the project. This tool is specifically useful within the “Define” phase of a DMAIC project due to how it provides a basis for *identifying* and *defining* specific viable aspects of the project, including the: overall mission, deliverables or outputs desired, members who will be participating, and timelines for completing individual tasks. Essentially, the Project Charter aligns as a key step of the “Define” phase, as it clarifies the overall structure for the dates, participants, and goals of a process improvement project. In regards to my specific process—the retention process of WIB club members—this Charter serves as a way to outline the key deliverables of my project, including an increased number of annual paying club members and improved membership benefits, and also guides the sequence of project steps to be taken, which encapsulates compiling data from a Membership Agreement survey and proceeding through the DMAIC sequence.

### PROJECT CHARTER

<b>Project Name: (1)</b> Improving Member Engagement and Retention at Cal Poly's Women In Business Club (WIB)	<b>Business/Location: (2)</b> Cal Poly Women in Business (WIB) 1 Grand Avenue San Luis Obispo, CA 93407
<b>Team Leader: (3)</b> Zara Budreika   (858) 281-3162	<b>Champion: (4)</b> Abigail Dorman, WIB VP of Activities   (805) 551-5286
<b>Project Description/Mission: (5)</b> Improve member engagement and retention throughout the duration of each quarter, to increase the number of meeting attendees who pay membership fees. The improvement of club member retention will decrease the organization's reliance on external funding and sponsorships, and improve membership benefits.	
<b>Problem Statement: (6)</b> The current process within Cal Poly's Women in Business club of engaging and retaining the number of meeting attendees as each quarter progresses is ineffective and unsustainable. Specifically, after each quarter's introductory club meeting, the number of club members, and accordingly, membership dues gathered from new members, begins to significantly decline. As a result, the club has received insufficient funding from membership dues alone and has therefore had to rely more heavily on corporate sponsorships and outreach for financial support for its events, conferences, and catering.	
<b>Business Case: (7)</b> Undertaking this project, as opposed to pursuing another activity, will directly assist the Cal Poly Women in Business club with increasing their annual funding, which, in response, will create more enjoyable opportunities and experiences for club members, including: food being offered more frequently at meetings, an increase in fun member events and socials, and club members being offered small perks and gifts throughout each quarter. Failure to increase WIB's internal funding may lead to students choosing to join other clubs and organizations.	
<b>Deliverables: (8)</b> Increased number of paying club members, improved level of member/customer satisfaction, revised benefits for paying members, and decreased dependency on external sponsors for funding.	<b>Goals/Metrics: (9)</b> Increase number of paying club members by 30%; Have the WIB club become more engaging and attractive toward potential incoming members; Increase number of new 3rd/4th/5th-Year memberships by 10%; Increase number of new memberships from non-business majors by 10%.

## Tool 1: Project Charter (Continued)

**Process & Owner: (10)**  
 The process involved is the engagement and retention of current and future WIB club members, which is encouraged through the design of weekly meetings and panels. The process owner is the club president, Layna Hathaway.

**Project Scope Is: (11)**  
 The process extends from outreach toward students, via Social Media and Word-of-Mouth advertising, to engagement of members via execution of weekly meetings, to retaining those members through a quarterly and yearly basis.

**Project Scope Is Not:**  
 The project scope does not pertain to the nomination or development of the Women in Business executive board.

<p><b>Key Customers: (12)</b>                  The internal customers affected are both the paying and non-paying Women in Business club members, who attend club meetings and events.</p>	<p><b>Expectations: (13)</b>                  The outcomes expected by the customers are: higher quality of weekly club meetings, a larger number of individuals at each meeting to network with, and more benefits provided to club members who may membership dues.</p>
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<p><b>Milestones: (14)</b>  <b>Project Start: 07/17/2022</b>                  Define Phase                  Measure Phase                  Analyze Phase                  Improve Phase                  Control Phase  <b>Project Completion: 08/28/2022</b></p>	<p><b>Completion Dates: (15)</b>                  7/24/2022                  7/31/2022                  8/14/2022                  8/21/2022                  8/28/2022</p>
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Expected Business Benefits: (16)	Quantify		Explanation
	1-Time	Annual	
<input type="checkbox"/>			By increasing the number of WIB club members who pay membership dues, the club will have an <u>expanded budget</u> to use to give back to members, including for creating more events and providing better and more frequent perks throughout each quarter, such as offering food at all meetings (Annual). By fostering more engaging and worthwhile perks to paying members, the WIB club will continually <u>entice future potential members to join</u> and experience the club for themselves (Annual).
<input type="checkbox"/>			
<input checked="" type="checkbox"/>		X	
<input type="checkbox"/>		X	
<input type="checkbox"/>			
<input checked="" type="checkbox"/>			

**Team Members: (17)**  
 Zara Budreika, Abigail Dorman, and the WIB Executive Board.

**Expected Resource Needs (Internal/External): (18)**  
 Executing this project and analysis will take place over the course of 5 weeks. Data resources will need to be acquired from the VP of Analytics, which will provide information from the Google Surveys collected during each WIB club meeting. Each survey will contain data on number of members in attendance, attendee personal information (Name, major, grade level, etc.), and attendee satisfaction level with the club and its benefits. For this project, acquiring data will have no cost, and upon receipt, the data will then need to be cleaned by the Team Leader.

**Risk Assessment: (19)**  
 Quality of attendee information gathered through meetings' Google Survey links may be limited or not fully representative.

<p><b>Prepared By: (20)</b>                  Zara Budreika</p>	<p><b>Date (Last Revision): (21)</b>                  7/31/2022</p>
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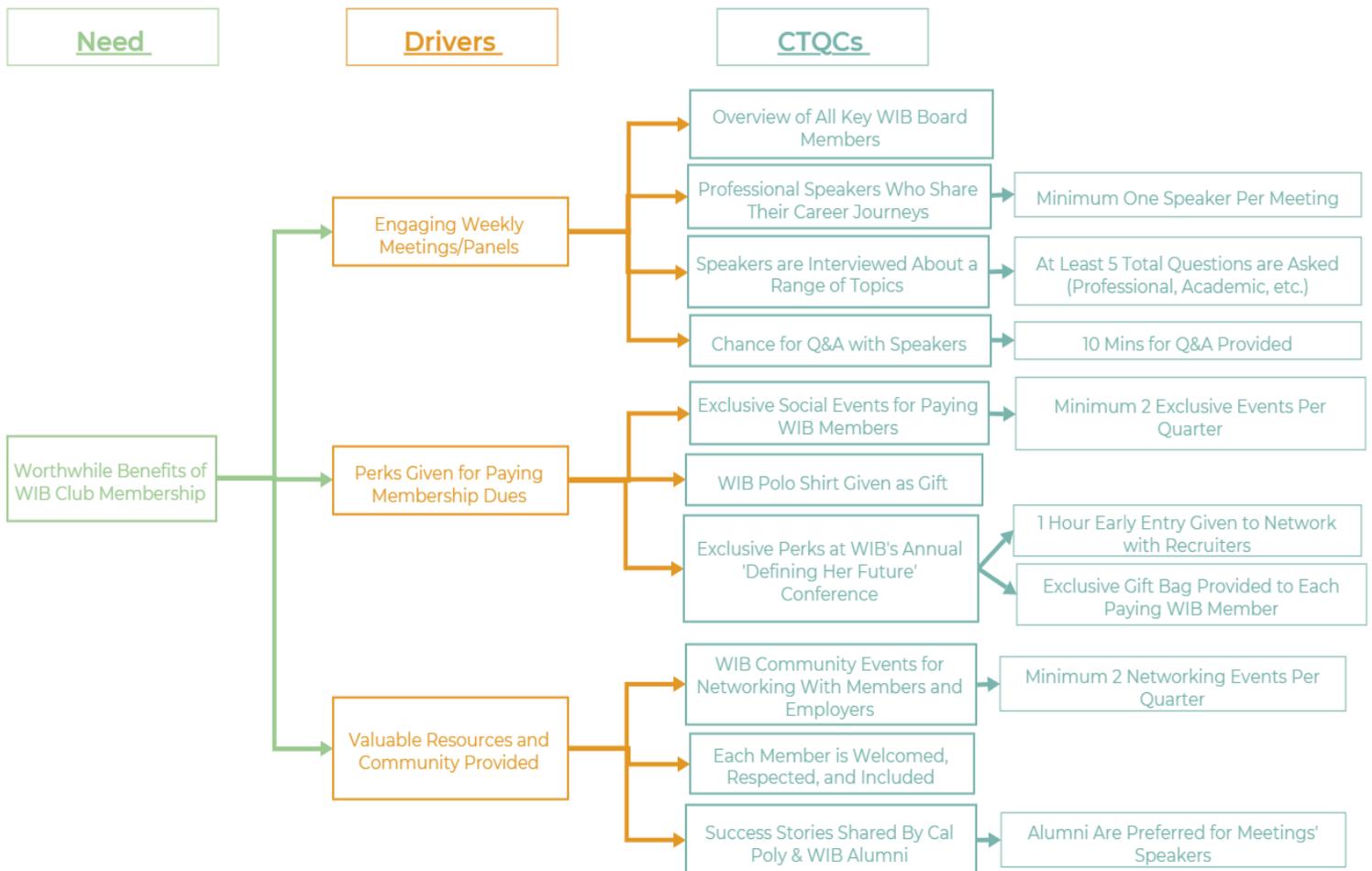
### *Tool 1: Project Charter (Continued)*

**INTERPRETATION:** The Project Charter, as a whole, is essential for outlining each of the deliverables, goals, and phases tied to the pursuit of a Lean Six Sigma project. Therefore, the Project Charter is valuable to pursue as an initial step of the “Define” phase, as it lays out the scope of both the mission and steps to be taken through a Lean project. In regard to my individual project, in which I assessed the Women in Business club’s difficulty with member retention and engagement, the Project Charter tool provided me with the means to ensure that each further step and tool I utilized aligned with my overall goal of increasing the number of WIB members who pay membership dues, to increase WIB’s internal funding. As well, this tool enabled me to stay on track with completing each phase of the DMAIC process in a timely manner, uplifting organization and structure along the entire course of the Lean Six Sigma project.

# DEFINE

## Tool 2: Critical to Quality Characteristics (CTQC) Tree Diagram

**WHY:** The Critical to Quality Characteristics (CTQC) Tree Diagram acts as a useful tool for converting general desires of a business’s customers into specific requirements that can be measurable and actionable, which is key to any Lean Six Sigma project. Furthermore, the CTQC Tree Diagram is particular to the “Define” phase, as it determines the drivers of customer satisfaction, which should be prioritized as someone begins pursuing a DMAIC project. Essentially, the CTQC Tree Diagram directly aligns with how the “Define” phase intends to capture and translate the customer’s voice, to determine the greatest opportunities for improvement within a business. I chose to utilize a CTQC Tree Diagram within my project to determine the primary “drivers” behind the Women in Business’s club attendees’ need for engaging and worthwhile benefits of paying for and pursuing club membership. Therefore, the CTQC Tree Diagram was utilized to highlight the specific, actionable requirements for WIB club members to feel as though paying membership dues are worth their time, effort, and money.



## Tool 2: Critical to Quality Characteristics (CTQC) Tree Diagram (Continued)

**INTERPRETATION:** For my project, the CTQC Tree Diagram served as a highly beneficial tool for turning general desires of the customers–WIB club attendees–into specific, measurable, and overarching requirements. As part of the “Define” phase, the CTQC Diagram outlined the voice of the customers in an actionable fashion, in which three particular areas became measurable: 1) Engaging Weekly Meetings, 2) Perks Given for Paying Membership Dues, and 3) Valuable Resources and Community Provided. Upon creating the CTQC Tree Diagram, I uncovered areas that can now be both measured and analyzed with further Lean tools. As a whole, this tool propelled me to take steps to specifically address the needs and desires of WIB club attendees, to ultimately satisfy my customers and ensure that attendees who pay membership dues feel as though their dues are worthwhile. Overall, this tool will enable the Women in Business club to gather more internal funding from membership dues and *decrease* reliance on external sponsors.

## MEASURE

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### *Tool 3: Cause and Effect Matrix*

**WHY:** The Cause and Effect Matrix is an essential tool for prioritizing which process inputs (X Variables) are most likely to impact the process output (Y Variable). This matrix is useful as part of the “Measure” phase of the DMAIC process, as it provides a basis for prioritizing and measuring the Critical-to-Quality Characteristics (CTQC’s) that are apparent to a group of customers. In the case of my particular project, the Cause and Effect Matrix will enable me to see which factors may be the most, or least, influential on attendees of the Women in Business club (WIB) and accordingly, their inclination to pay membership dues and continue to participate in the club. Overall, utilizing the CTQC’s from my CTQC Tree Diagram (Tool 2) along the vertical left side of the matrix—as “Effects”—along with the process inputs—as “Causes”—listed horizontally, the matrix will indicate which data collection efforts should be prioritized (See Next Page for Matrix).

**INTERPRETATION:** The Cause and Effect Matrix utilized information from my CTQC Tree Diagram (Tool 2), to portray the factors that rank the highest in terms of leverage over the CTQC’s that are desired and expected by customers. Thus, this matrix tool acts as a crucial step in the “Measure” phase, as it provides a basis for identifying which inputs are most critical and worth being measured and then analyzed further in the next phase of the DMAIC process—the “Analyze” phase. Specifically, for my project, the Cause and Effect Matrix guided the DMAIC process forward, allowing me to identify the following three “Inputs” that ranked as the most influential:

- 1) Perform Outreach to All Cal Poly Majors**
- 2) Create Engaging, Thorough PowerPoints to Introduce and Explain the Women in Business Club at Each Meeting**
- 3) Recruit New Club Members from All Grade Levels**

Therefore, evaluating that the aforementioned three “Inputs” ranked the highest, I will focus on improving these factors. Each of these categories will guide me towards the ultimate goal of increasing WIB’s internal funding so that the club can give back to its members, and as a whole, prioritize the needs of its customers.

### Tool 3: Cause and Effect Matrix (Continued)

**Problem Statement:** Cal Poly's Women in Business Club (WIB) is experiencing difficulty with engaging and retaining club meeting attendees, and therefore, it has received insufficient funding from membership dues alone. As a result, WIB has had to rely more heavily on external sponsors for funding.

Requirements - WHATs	Importance Rating	Inputs - HOWs	Create Engaging, Thorough PowerPoints to Introduce and Explain Club at Each Meeting	Recruit Reputable Speakers for Meetings	Recruit New Club Members from All Grade Levels	Create Interview Questions in Advance of Meetings	Manage Time Effectively at Meetings	Hold Frequent Fundraisers	Train WIB Board Members on Club Structure and Policies	Manage Allotted Quarterly Club Budget	Encourage Club Attendees to Pay Membership Dues	Advertise Club Meetings Through Several Platforms	Perform Outreach to All Cal Poly Majors
Provide Overview of All Key WIB Board Members During Each Club Meeting	L		+++	none	none	none	++	none	none	none	none	none	none
Have Professional Speakers Who Share Their Career Journeys at Meetings	H		none	+++	none	+	none	none	none	none	none	none	none
Speakers are Interviewed About a Range of Topics	M		none	+	none	+++	+++	none	+	none	none	none	none
Provide Chance for Q&A with Speakers	L		none	none	+	+	+++	none	+	none	none	none	none
Have Funds to Provide Exclusive Social Events for Paying WIB Members	H		++	none	+++	none	+	+++	none	+++	+++	+++	+++
Have Funds to Provide WIB Polo Shirt as Gift to Paying Club Members	L		none	+	+++	none	+	+++	none	+++	+++	+++	+++
Provide Exclusive Perks at WIB's Annual "Defining Her Future" Conference	M		none	none	+++	none	+	+++	none	+++	+++	+++	+++
Promote WIB Community Events for Networking With Members and Relevant Employers	H		+++	none	+	none	++	+	+++	+	+	none	none
Each Member is Welcomed, Respected, and Included	H		++	+	+	+	none	none	+++	none	none	+	+++
Have Success Stories Shared By Cal Poly & WIB Alumni	M		none	+++	none	+++	none	none	none	none	none	none	none

Score	60	49	56	41	47	50	54	50	50	50	50	70
Ranking	2	9	3	11	10	5	4	5	5	5	5	1

## MEASURE

### Tool 4: Pie Charts (2)

**WHY:** A two-dimensional Pie Chart is a valuable tool within the “Measure” phase of the DMAIC process, evaluating that this type of chart depicts the proportion that each category of the “pie” holds. In other words, the area that each “slice” encompasses represents the frequency of that category, and as a whole, pie charts serve as a highly visual tool for picturing which category occurs most frequently. Pie Charts are specifically useful in the “Measure” phase as they aesthetically depict the measurements of various categories of data that, together, represent a “whole.” I chose to create two Pie Charts for my project, to depict the following information: 1) The Make-Up of **Grade Level** for WIB Members Who Have Paid Membership Dues in 2021-2022, and 2) The Make-Up of **Majors** for WIB Members Who Have Paid Membership Dues in 2021-2022. The creation of these two pie charts aligns with my Cause and Effect Matrix (Tool 3), as through this matrix, it was revealed that high priority should be placed on performing outreach towards **all grade levels and all majors** at Cal Poly, to ultimately encourage new attendees to convert to committed, paying members. To create the two Pie Charts, I utilized data gathered via a Google Survey that featured answers from the Women in Business club members who paid membership dues during the academic year, 2021-2022. Within this data set, 154 paying members provided data regarding themselves, including their grade level and major, which, as mentioned, which will be focused on.

Screenshot of Google Survey: “2021-2022 WIB Membership Agreement” (Screenshot Represents Part of Entire Data Set)<sup>1</sup>

Name (Last, First)	Polo Siz	Polo Received	Type of Membership	Cal Poly Email	Do you already rece	Year in Schol	Major	Concentrator
Agarwal, Prisha		N/A	Quarter-Winter	pagarw04@calpoly.edu	No	1st	Business Administration	
Alaoui Ismaili, Nour	S	N/A	Annual	nalaouii@calpoly.edu	No	1st	Communications	
Amy Schmit	S	N/A	Annual	akschmit@calpoly.edu	Yes	1st	Business Administration	
Baskar, Supriya	S	N/A	Annual	sbaskar@calpoly.edu	Yes	1st	Business Administration	
Berg, Leah	M	N/A	Annual	leberg@calpoly.edu	No	1st	Business Administration	
Bountouvas, Tiffany	M	N/A	Annual	tbountou@calpoly.edu	No	1st	Business Administration	
Chinn, Emma	S	N/A	Annual	echinn01@calpoly.edu	No	1st	Business Administration	N/A
Chu, Justine	XS	N/A	Annual	jchu38@calpoly.edu	No	4th	Business Administration	Human Resources and Management
Cleary, Ally	S	N/A	Annual	alcleary@calpoly.edu	Yes	1st	Animal Science	
Daghlian, Lara	L	N/A	Annual	ldaghlia@calpoly.edu	Yes	2nd	Business Administration	
Davis, Morgan	M	N/A	Annual	Mdavi114@calpoly.edu	Yes	1st	Business Administration	
Delen, Elise	M	N/A	Annual	Edelen@calpoly.edu	Yes	1st	Business Administration	N/A
Edgerle, Emily	S	N/A	Annual	eedgerle@calpoly.edu	No	2nd	Business Administration	Undecided
Elerding, Chloe	L	N/A	Annual	ceelerdi@calpoly.edu	Yes	1st	Economics	planning on accounting
Esparza, Mieke	M	N/A	Annual	mespar04@calpoly.edu	No	2nd	Business Administration	
Fiske, Chloe	S	N/A	Annual	crfiske@calpoly.edu	No	2nd	Business administration	

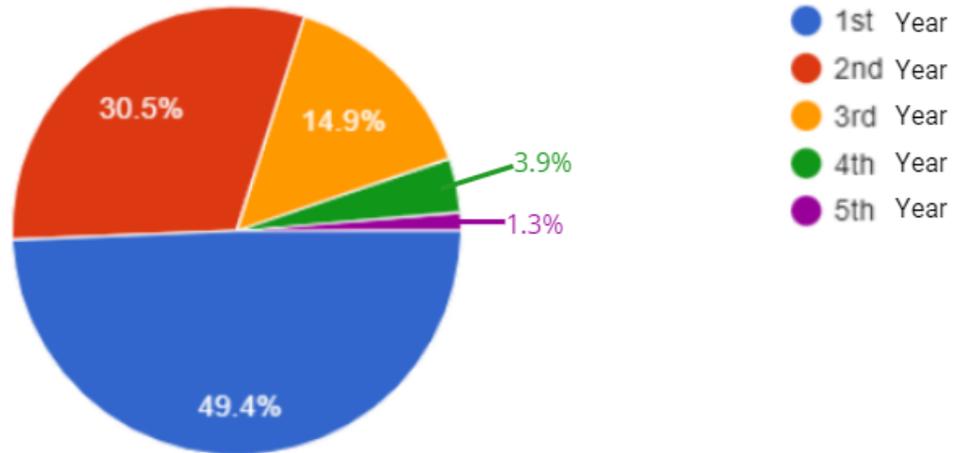
<sup>1</sup> [https://docs.google.com/spreadsheets/d/1ZGFsu-qD4W1xE2q8tbpJ6FVJ\\_BMeh2RlfcHC3VWYk/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1ZGFsu-qD4W1xE2q8tbpJ6FVJ_BMeh2RlfcHC3VWYk/edit?usp=sharing)

*Tool 4: Pie Charts (Continued)*

Pie Chart #1:

**Year in School of WIB Members Who Have Paid Membership Dues in 2021-2022**

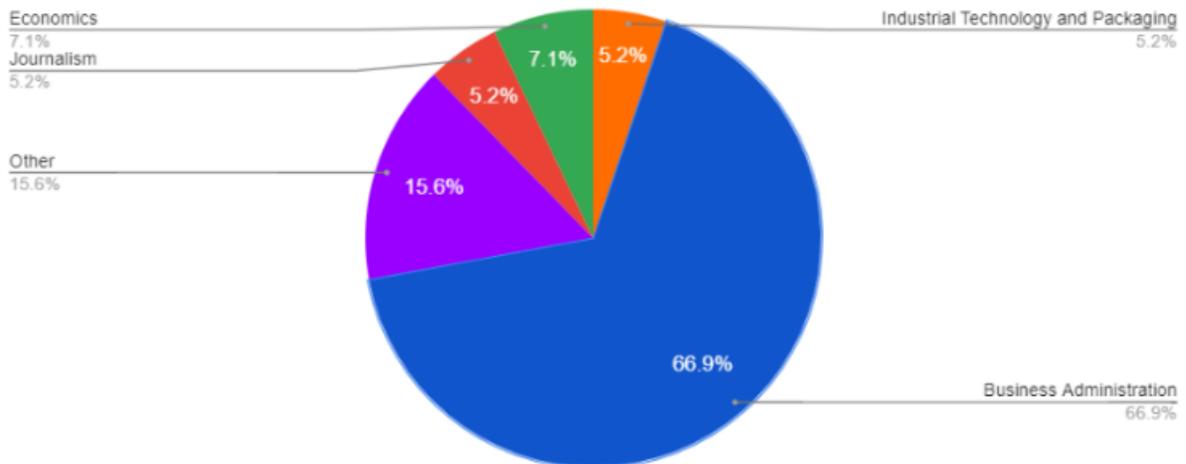
154 Responses



Pie Chart #2:

**Majors of WIB Members Who Have Paid Membership Dues in 2021-2022**

154 Responses



### Tool 4: Pie Charts (Continued)

**INTERPRETATION:** Pie Charts are an essential tool for depicting the proportions that different categories make up within a whole. When properly labeled and distinguished with a unique color, proportions within a Pie Chart can provide key takeaways that guide the DMAIC process forward. As part of the “Measure” phase, Pie Charts serve as a way to identify key relevant metrics that pertain to CTQC’s that customers desire and expect. Upon reflecting on the two Pie Charts I created, a few essential points became evident. When examining Pie Chart #1: “Year in School of WIB Members Who Have Paid Membership Dues in 2021-2022,” it is clear that 1st-Year students constitute the largest proportion of the Pie Chart, accounting for 49.4% of all 154 students who paid membership dues. The next highest category was 2nd-Year students, encompassing 30.5%. With these measurements in mind, it is evident that the bulk of students who choose to become paying members of the Women in Business club are new, or relatively new, to Cal Poly, and therefore, WIB should consider focusing more outreach towards higher grade level students, such as 3rd-Years and 4th-Years.

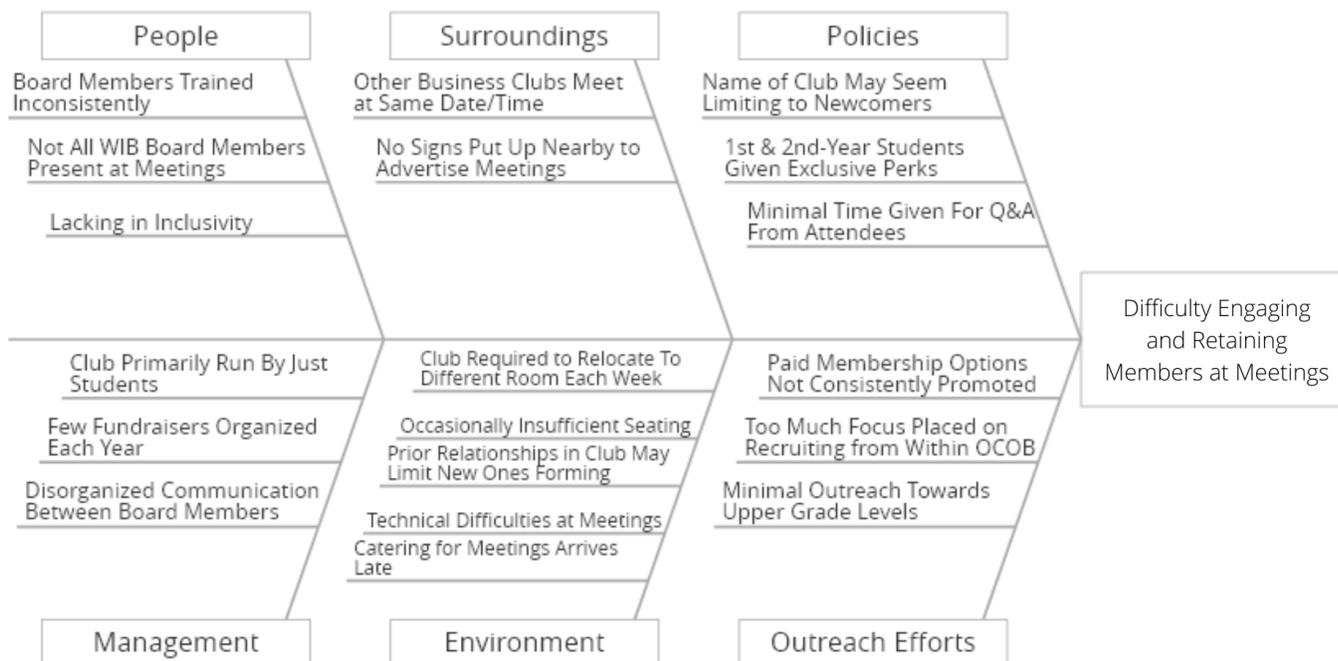
Upon looking at Pie Chart #2: “Majors of WIB Members Who Have Paid Membership Dues in 2021-2022,” the most common major is Business Administration, accounting for 66.9% of all 154 paying members during 2021-2022. Reflecting on this metric, I can infer that the Women in Business club may appear to outsiders as limited to primarily just Business majors, or affiliated majors, such as Economics or Industrial Technology and Packaging. This preconceived notion is problematic, because the WIB club is, in fact, open to all majors, genders, and backgrounds, but WIB’s promotional efforts and materials may not clearly emphasize this. Therefore, to summarize, my efforts within this project should further address the following issues:

<u>Issue</u>	<u>Suggested Next Step</u>
1st and 2nd-Year Students constitute the bulk of paying members	Outreach should span to include and engage upper grade levels more
Business Administration and related majors (Economics, ITP, etc.) account for the majority of paying members	WIB’s promotional materials should emphasize inclusion more clearly and should reach students from all majors and backgrounds

## ANALYZE

### Tool 5: Fishbone Diagram

**WHY:** A Fishbone Diagram is a highly useful tool for identifying and organizing the root causes of a business problem. Upon successfully completing a Fishbone Diagram, several visual linkages can become apparent, which can ultimately help towards minimizing the overarching issues that are present. Utilizing a Fishbone Diagram within the “Analyze” phase is especially beneficial, as this tool provides direct insight into a multitude of inputs that play a role in each step of a process. In regard to my particular project, the Fishbone Diagram will be useful to identify the various inputs that have a relationship with the overall process of engaging and retaining Women in Business club members. Furthermore, this tool will also be used to identify root causes that are out of WIB’s control, and are therefore not worth pursuing as part of this project. Adding on, this tool will propel me to address the critical question: “How are multiple causal factors related and how do they interact?,” which will provide a basis for the pursuit of my next tool, Regression Analysis (Tool 6).



### Tool 5: Fishbone Diagram (Continued)

**INTERPRETATION:** The Fishbone Diagram is a fundamental tool for assessing the many root causes behind an issue—both internal and external to the organization. Furthermore, the Fishbone Diagram serves as a way to assess which causes can be directly addressed by your organization or not; Several causes may be identified as out of your organization's control or abilities, which indicate that those causes will not be as easily examined or acted upon. This tool is highly useful as part of the "Analyze" phase specifically, because it helps an individual to assess and explore which causes are most worthwhile to pursue, especially through statistical analysis methods. I personally chose to use a Fishbone Diagram in this section of my DMAIC project to explore the influence of various realms on my overall issue of "Difficulty Engaging and Retaining Members at Meetings," because I wanted to see which root causes would be most viable to assess with statistics through my next tool, Tool 6.

Upon completing the Fishbone Diagram, it became evident that WIB had a few external issues that are out of their immediate control, including: other business clubs hosting meetings at the same time and date, and the club being required to relocate for meetings each week, due to certain classrooms only being available at specific times. Some of the root causes that WIB *can* control are: putting up physical signs to guide attendees to meeting locations, emphasizing that the club is open to all genders and backgrounds, and consistently promoting the benefits of committing to a paid WIB club membership. Furthermore, WIB has performed minimal outreach and engagement efforts towards students of upper grade levels. Because of discovering this takeaway, I became inspired to conduct further exploration through my next tool, Regression Analysis, to assess how the satisfaction levels of upper-grade level students may differ from lower-grade level students.

## ANALYZE

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### Tool 6: Statistical Tool – Simple Linear Regression Analysis

**WHY:** For my second tool of the “Analyze” phase of the DMAIC process, I utilized a Regression Analysis, which serves as a tool for identifying whether there is a relationship between two variables—an independent variable (X) and dependent variable (Y). Regression Analysis serves a valuable role within the “Analyze” phase specifically, as this tool helps to analyze whether one variable is influenced by another, and illuminates the specific strength and direction of that relationship. Adding on, Regression is a valuable tool for the “Analyze” stage because of how it helps us to recognize which variables influence our output. Regression Analysis differs from Correlation Analysis, as Correlation simply looks for a relationship between two quantitative variables, while Regression looks to see if a change in one variable can be used to *predict* a change in another variable. In the case of my project, using Regression Analysis appeared most suitable, as I wanted to assess the relationship and impact of the following two quantitative variables: “Year in School of Club Member (1-5),” as my X Variable, and “Level of Satisfaction with Club (1-10),” as my Y Variable. Data was gathered through a Qualtrics survey titled, “WIB Member Satisfaction Survey 2021-2022,” and was then input into JMP statistical software for analysis. Overall, I chose Regression Analysis because I was very curious to investigate the potential association between Year in School (X) and Satisfaction Level (Y), especially since my previous findings indicated that WIB should consider engaging upper grade levels more; I wanted to explore how higher grade levels felt in terms of satisfaction, since there was previous indication that they were being less engaged by the club.

### Tool 6: Statistical Tool – Simple Linear Regression Analysis (Continued)

**Hypothesis:** The “Year in School of WIB club Members (1-5)” has no correlation/statistical significance to the “Level of Satisfaction with Club (1-10).”

- **Null Hypothesis** →  $H_0: \beta_1 = 0$  (No linear relationship between Year in School and Satisfaction Level)
- **Alternative Hypothesis** →  $H_a: \beta_1 \neq 0$  (Linear relationship between Year in School and Satisfaction Level)

### Sample of Qualtrics Survey Question Through Which Data Was Gathered:

Please rank how satisfied you are with the Women in Business club (WIB) and its membership benefits:

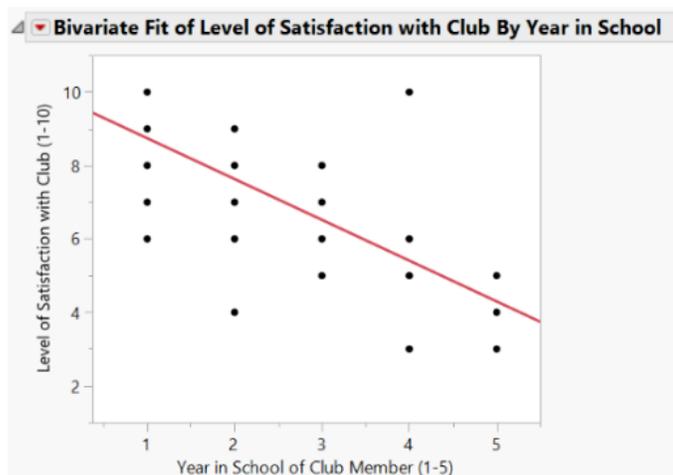
1: Extremely Dissatisfied	2	3	4	5	6	7	8	9	10: Extremely Satisfied
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### Screenshot of Compiled Data on JMP Statistical Software (Screenshot Represents Part of Entire Data Set):

	Name (Last, First)	Year in School	Amount Paid for Membership	Level of Satisfaction with Club
67	Agarwal, Prisha	1	15	10
68	Alaoui Ismaili, No...	2	15	9
69	Amy Schmit	2	15	8
70	Baskar, Supriya	3	15	9
71	Berg, Leah	4	15	8
72	Bountouvas, Tiffa...	1	15	8
73	Chinn, Emma	5	40	9
74	Chu, Justine	4	40	5
75	Cleary, Ally	1	40	8
76	Daghlian, Lara	2	40	7
77	Davis, Morgan	1	40	10
78	Delen, Elise	1	40	10
79	Doelman, Elle	1	15	8
80	Edgerle, Emily	2	15	7

## Tool 6: Statistical Tool – Simple Linear Regression Analysis (Continued)

### Regression Graph:



*\*\*154 data points were plotted, but due to repeats of ranked scores, the graph appears as follows.*

### Regression Model:

Linear Fit	
Level of Satisfaction with Club = 9.8178276 - 1.0842669*Year in School	

### Regression Statistics:

Summary Statistics				
	Value	Lower 95%	Upper 95%	Signif. Prob
Correlation	-0.69193	-0.76602	-0.5997	<.0001*
Covariance	-1.11906			
Count	155			
Variable	Mean	Std Dev		
Year in School	1.819355	1.015919		
Level of Satisfaction with Club	7.845161	1.591952		

Summary of Fit	
RSquare	0.478774
RSquare Adj	0.475367
Root Mean Square Error	1.153075
Mean of Response	7.845161
Observations (or Sum Wgts)	155

## Tool 6: Statistical Tool – Simple Linear Regression Analysis (Continued)

### Coefficient Table:

Parameter Estimates				
Term	Estimate	Std Error	t Ratio	Prob> t
Intercept	9.8178276	0.19044	51.55	<.0001
Year in School	-1.084267	0.091462	-11.85	<.0001

### ANOVA:

Analysis of Variance				
Source	DF	Sum of Squares	Mean Square	F Ratio
Model	1	186.85767	186.858	140.5385
Error	153	203.42621	1.330	<b>Prob &gt; F</b>
C. Total	154	390.28387		<.0001

### Results:

Alpha = 0.05

P-Value = <0.0001

P-Value < Alpha → Decision: **Reject H0**

**Conclusion:** At a 0.05 significance level, we have sufficient evidence to reject the null hypothesis and to conclude that there is a significant negative linear relationship between Year in School (X) and Satisfaction Level with Club (Y).

### Tool 6: Statistical Tool – Simple Linear Regression Analysis (Continued)

**INTERPRETATION:** Regression Analysis, as a whole, provides statistical insight into the significance of our Y, or independent, variable and helps to identify the overall interaction between an input and output. Although Regression cannot prove a causal relationship between variables, it can *disprove* a causal relationship, which can help to narrow down possible causes of a business's issue, serving as a vital part of the "Analyze" phase of the DMAIC sequence. For my project, Regression provided an insightful glimpse into the relationship between the "Year in School of WIB Member" and "Satisfaction Level with the Club." Upon conducting the Regression test using JMP software, I received a P-Value of  $<0.001$  for "Year in School of WIB club Members (1-5)," the Independent Variable I was examining. Therefore, using this P-Value is lower than the chosen alpha level of significance of 0.05, suggesting that at a 0.05 significance level, we have sufficient evidence to reject the null hypothesis and to conclude that there *is* a significant negative linear relationship between Year in School (X) and Satisfaction Level with Club (Y). Upon rejecting the null hypothesis, the following relationship is indicated: As the year in school/grade level of a WIB club member *increases*, their satisfaction level with the club *decreases*. Thus, I gather that the Women in Business club must put more effort into engaging students of higher grade levels, as their satisfaction levels tend to be lower than those of lower grade levels. This may also suggest that WIB currently caters to its younger students with enticing resources that older students do not get to experience, and accordingly, WIB should intrigue older students through exclusive panels, networking opportunities, and social events.

## IMPROVE

### Tool 7: Brainstorming

**WHY:** Brainstorming serves as a powerful tool for a team to generate new and creative ideas for solving a problem. At its core, brainstorming should display an atmosphere of no judgment or criticism, so that many ideas—even outlandish ones—may be expressed and considered. The “Improve” phase considers which improvement actions are necessary and beneficial towards achieving your targets, and in relation to this, Brainstorming serves as a valuable tool for considering plausible actions for improvement, along with other viable alternatives as well. In relation to my specific project, I chose Brainstorming to serve as a key way to consider the vast range of ways to improve retaining WIB club members, in relation to the clubs meetings, membership perks and promotions, and social events. Collaborating with Abigail Dorman, the WIB Vice President of Activities and overseer of all WIB meetings, she and I conducted a Brainstorming session to ponder over the multitude of possible ways for the club to improve its efforts towards member retention and engagement.



### *Tool 7: Brainstorming (Continued)*

**INTERPRETATION:** Brainstorming, as a whole, is a fundamental way to explore a myriad of possible ideas and actions to take towards solving a problem. In order for brainstorming to be most effective, several individuals should have the opportunity to voice their thoughts without any judgemental scrutiny, and the Brainstorming session should promote a consistent and free flow of ideas. This tool is particularly useful within the “Improve” phase of the DMAIC process, as it provides guidance toward determining ultimate steps for improvement, but in a fluid and open-ended fashion. Furthermore, as part of the “Improve” phase, Brainstorming serves as an efficient way to generate multiple ideas while simultaneously weeding out the options that are either: less agreed upon, or less viable. I enjoyed Brainstorming ways to improve member retention for my project, as it felt effective to incorporate the views of Abigail Dorman, the Women in Business VP of Activities, as she presented valuable insights based on her intimate experiences with the club. Since Abigail helps to conduct each WIB meeting, she was familiar with how the club does not consistently share the direct benefits of becoming a paying club member, and to address this, she uplifted the idea of announcing club membership benefits at all meetings and sending out automated reminders to club attendees regarding the opportunity to pay membership dues. Furthermore, Abigail shared her knowledge that several benefits and resources overlap for both paying and non-paying club members, so she suggested that the WIB club offer more exclusive perks, including special catering at certain meetings, and/or providing exclusive resources, such as networking opportunities with recruiters. Furthermore, we both agreed upon enhancing club meetings, through: sharing WIB alumni success stories, covering a range of diverse topics to intrigue most attendees, and allowing for the chance at meetings to foster connections between attendees and board members. Overall, the process of Brainstorming was especially helpful with discovering and evaluating new ways to better engage and retain WIB club attendees.

## IMPROVE

### Tool 8: Corrective Action Matrix

**WHY:** I chose to utilize the Corrective Action Matrix as my second tool in the “Improve” phase, as this matrix will assess and ensure proper implementation of corrective steps toward process improvement. In other words, the Corrective Action Matrix tool will keep track of who is doing what by when, to see how improvement steps are proceeding within the overall DMAIC project. As a whole, this matrix tool aligns well with the “Improve” phase, as it depicts actions and steps being taken to realistically improve the process. In this case, the process at hand is the retention and engagement of Women in Business club members, and the Corrective Action Matrix will serve as a means to assess the status of progress made thus far on my project. Furthermore the Corrective Action Matrix will also address the effectiveness of each action, and on the rightmost side of the matrix, will list whether each action is already completed or remains in progress. To summarize, as shown below, the following actions have already been completed toward improving the retention and engagement of WIB club attendees:

1) Create a template for thorough PowerPoint intro slides that effectively introduce and explain the WIB club, its board members, and membership perks.
2) Brainstorm intriguing meeting topics and speakers for the upcoming quarter.
3) Brainstorm new resources and perks for being a paying member of WIB.

As it was determined that these steps have been successfully completed, this guided me towards feeling organized and on-track with my overall project. Thus, the Corrective Action Matrix provided structure for closing out the “Improve” Phase of the DMAIC process, and clarified which actions must *still* be taken to encourage a successful completion of my project.

### Tool 8: Corrective Action Matrix (Continued)

<b>Team Name</b>	Cal Poly Women in Business (WIB)		<b>Revision</b>	A	
<b>Team Leader</b>	Zara Budreika				
<b>Date</b>	8/24/2022				
Reference Number	Action	Person Responsible	Target Date	Effectiveness	Current Status
1	Perform outreach specifically towards 3rd, 4th, and 5th-Year students.	WIB VP of Outreach	9/10/2022	10%	In Process
2	Promote WIB to students outside of the Orfalea College of Business (OCOB).	WIB VP of Marketing	9/10/2022	10%	In Process
3	Promote WIB's inclusivity policies via email, emphasizing that all genders, majors, and backgrounds are welcome.	Zara Budreika & WIB VP of Marketing	9/10/2022	10%	In Process
4	Create a template for thorough PowerPoint intro slides that effectively introduce and explain the WIB club, its board members, and membership perks.	Zara Budreika	8/20/2022	20%	Completed
5	Brainstorm intriguing meeting topics and speakers for the upcoming quarter.	Zara Budreika	8/20/2022	20%	Completed
6	Brainstorm new resources and perks for being a paying member of WIB.	WIB VP of Programming	8/23/2022	25%	Completed
7	Increase number of paying club members by 30% from 2021-2022.	WIB VP of Strategic Initiatives & VP of Outreach	8/20/2023	5%	In Process

\*\*Since WIB does not host club meetings during the Summer Quarter, some Target Dates span beyond the range of our summer class, and aim to be completed closer to the beginning of Fall Quarter, when meetings will resume.

## Tool 8: Corrective Action Matrix (Continued)

### Brainstormed Meeting Topics and Speakers:

#### **Fall Events + Details**

- ★ **October 5: First Monthly Meeting** → spend money
  - Confirmed Speakers: Travis (briefly)
  - Themes: Get to know board, intro meeting
  - Catering: [Urbane](#)
  - Location: In person 03-114
  - Activities: Post it ideas, unique prompts, get to know board in funny ways,
- ★ **October 12: Personal Branding Workshop** → snacks
  - Confirmed Speakers: Bri Gallo
  - Themes: Personal brand crafting, creating e-business cards
  - Catering: [House of bread](#) (Breakfast tray option)
  - Location: In person 03-114 or Zoom
- ★ **October 19: Women in Media & Entertainment** → snacks
  - Confirmed Speakers: Kristen Jackman (twitter), Kirsten Marshall (pixar), Janelle Jacoby (disney)
  - Themes: Industry specific questions, advice on how to get into media & entertainment, pivotal stories, Q&A
  - Catering: None
  - Location: Zoom
- ★ **October 21: Interviewing Workshop** → snacks
  - Confirmed Speakers: Travis + Career peer?
  - Themes: Basics of interviewing, practice?, Q&A
  - Catering: [SLO Provisions](#) (3 sandwich options)
  - Location: In person 03-114
- ★ **October 28: Alumni Panel** → more substantial
  - Confirmed Speakers: Anjana Melvin, Nicole Walsworth, Lauren Ross
  - Themes: Get to know speakers, things they've learnt post grad, advice, Q&A
  - Catering: [Taste](#) (skewer board)
  - Location: In person 03-114?

### *Tool 8: Corrective Action Matrix (Continued)*

**INTERPRETATION:** The Corrective Action Matrix is a valuable tool for ensuring that improvement actions are truly implemented, performed by particular individuals, and are assessed for their status of progression and effectiveness. In simple terms, the Corrective Action Matrix provides a visual representation of who is doing what by when. This tool plays a vital role in the “Improve” phase of the DMAIC process specifically, because it assesses and aims to improve the problems within my process that arose during the “Define” and “Measure” phases. I chose to utilize the Corrective Action Matrix within my project to provide an overall snapshot of the current progress I had made for 7 various improvement actions. Upon completing the matrix, I was able to check off having completed three particular actions, as mentioned earlier: 1) Creating a template for PowerPoint intro slides that effectively introduce and explain WIB, 2) Brainstorming intriguing meeting topics and speakers for the upcoming quarter, and 3) Brainstorming new resources and perks for paying WIB membership dues. Adding on, I have 4 remaining improvement actions to complete to improve the process of engaging and retaining WIB members. The Target Dates for 3 of these remaining actions span closer to the beginning of Fall Quarter, as WIB does not host events during the Summer Quarter. Furthermore, for the overall improvement goal of “Increasing the number of paying WIB members by 30% from 2021-2022,” has a Target Date of August 20th, 2023, as this action will only be fully evaluated once data is compiled and analyzed during the duration of the upcoming academic year, 2022-2023. To conclude, the improvement actions listed within the Corrective Action Matrix are intended as long-lasting changes that WIB will pursue for as long as the club has a presence, to encourage new and existing members to feel welcomed, captivated, and eager to commit to paying for club membership.

## CONTROL

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### *Tool 9: Standard Work*

**WHY:** For my first tool within the “Control” phase, I chose a Standard Work sheet, which represents a methodology for training people within an organization to carry out a process consistently and strategically. Adding on, a Standard Work sheet creates a balanced work flow and optimizes efficiency and consistency through documenting the cycle time, material and equipment required, and key points of performing a particular step within an overall process. Standard Work is beneficial to implement within the “Control” phase of the DMAIC, as it helps to encourage consistency from all employees who are involved within a particular action, which ultimately encourages *control* over the process. In addition, customer satisfaction is often improved when Standardized work is in effect, as quality and efficiency are both improved, which uplifts the goals of the final phase of the DMAIC process, the “Control” phase. Connecting back to Tool 3, the Cause and Effect Matrix, I discovered that one of the key tasks to prioritize was, “Create Engaging, Thorough PowerPoints to Introduce and Explain the Women in Business Club at Each Meeting,” and accordingly, I chose to utilize a Standard Work sheet to outline the key steps within performing an engaging and intriguing Women in Business Meeting. Creating appealing club meetings and panels is a key way to entice club attendees to continue to attend WIB events, which is why I felt as though I should standardize this part of my overall process of engaging and retaining members. Furthermore, I also included several sample templates for creating effective PowerPoint slides for meetings, so that future PowerPoints could be standardized in a similar way.

**KEY QUESTION:** How does the Women in Business club improve and maintain its ability to provide captivating weekly meetings, to ultimately encourage the engagement and retention of its members?

## Tool 9: Standard Work (Continued)

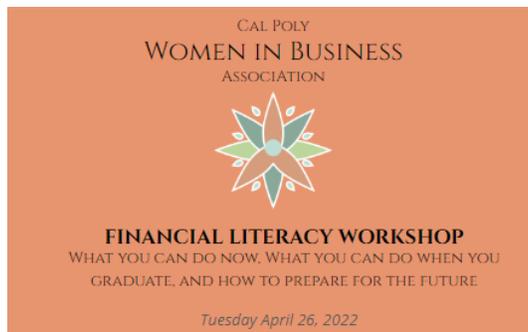
Process Engaging Club Members      Who's Responsible WIB VP of Activities      Observation Date 8/20/2022  
 Step Hosting Meetings      Process Step Cycle Time 50 Min-Meeting Duration      Observation Time 5:00 PM-6:00 PM  
 Observer Zara Budreika

Sub Step No.	Work Description	Digital Material Required	Equipment/Technology Required	Key Points	Time	Visual Reference
1	WIB VP of Activities greets the audience, introduces herself, and introduces the club.	PowerPoint for Meeting	Laptop, Projector	Welcome the audience to the meeting/panel and introduce full name. Introduce club to audience and state how the club is open to all genders, majors, and backgrounds, to encourage word-of-mouth promotion via attendees.	2 Min	
2	Project QR Code on screen for Sign-In Survey and request that attendees open the link to fill it out.	PowerPoint for Meeting, QR Code	Laptop, Projector	Display slide with QR code to Sign-In Survey and provide attendees 2 minutes to complete the survey. Verify with the audience that the QR code is working.	2 Min	<p>Thank you for coming to today's meeting! Please scan the QR code to Sign in.</p> 
3	Introduce WIB Board Members.	PowerPoint for Meeting	Laptop, Projector	Bring all present WIB board members up to the front of the room and have them each briefly introduce themselves. Project each member's slide with their picture and a description of their role.	5 Min	
4	Promote upcoming WIB club bonding opportunities and events.	PowerPoint for Meeting	Laptop, Projector	Project PowerPoint slides with dates and information about upcoming activities, and share this information with the audience.	2 Min	
5	Display WIB social media accounts and encourage attendees to stay in touch with WIB.	PowerPoint, Social Media Handles and Corresponding QR Codes	Laptop, Projector	Discuss the possible ways to digitally stay in touch with WIB, including via: Instagram, LinkedIn, Facebook, and Email. Project QR codes that correspond to each social media handle.	2 Min	
6	Introduce topic of the meeting/panel, along with its speaker(s).	PowerPoint	Laptop, Projector, Zoom Link	Inform the audience of the topic of the specific meeting, along with who the speaker(s) will be, and what their role is at a particular company.	2 Min	<p>PLEASE WELCOME TODAY'S SPEAKER</p> 
7	Conduct the Interview session with the speaker(s).	Document with Interview Questions	Laptop, Projector, Zoom Link	Using the pre-created document with interview questions for the speaker(s), ask at least 5 different questions and provide brief follow up responses to the speaker's responses.	20 Min	
8	Open up the floor to audience members for Q&A with speaker(s).	N/A	Laptop, Projector, Zoom Link	Give the audience 10 minutes worth of time to ask questions to the speaker(s). Ask for the audience members to raise their hand if they have a question, and call on individuals who have their hand raised.	10 Min	
9	Provide closing remarks and close up session; Remind members of paid membership perks; Project slide with End-of-Meeting Survey.	PowerPoint	Laptop, Projector	Project PowerPoint slides that depict a list of membership perks and costs, along with a QR code that leads to an End-of-Meeting survey. Ask if attendees have any questions about the club, and if not, thank everyone for attending.	5 Min	<p>Thank you for coming! Please scan the QR code below.</p> 

## Tool 9: Standard Work (Continued)

### Templates for Standardized PowerPoint Slides for WIB Meetings:

#### Introduction Slide:



#### Sign-In Survey QR Code Slide:



#### Example of WIB Event/Resource Slide:



#### Introducing Speaker and Topic of Meeting:



## Tool 9: Standard Work (Continued)

### Template for End-of-Meeting Survey:

Section 1 of 3

### WIB Alumni Panel 10/28/21

Welcome to the end-of-meeting survey for the WIB Alumni Panel! We hope you enjoyed the meeting!

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Recap of meeting

Description (optional)

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What did you enjoy most about this meeting? (Select all that apply) \*

- The content
- The speakers
- The community
- The food
- Other...

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How likely are you to recommend WIB to others? \*

0 1 2 3 4 5 6 7 8 9 10

Not at all likely             Extremely likely

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This meeting was beneficial for your personal/professional growth \*

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

### Tool 9: Standard Work (Continued)

**INTERPRETATION:** Utilizing a Standard Work sheet is an essential way to ensure that a particular step within an overall process is pursued in a consistent, efficient, and high-quality fashion. Standard Work plays a vital role in the last phase of DMAIC—the “Control” phase—as it serves as a method of ensuring control and structure over one, or several, of the key actions that contribute to an overall process. In other words, standardizing work ensures that work can be easily replicated, which minimizes room for error and inefficiency. I personally chose to use a Standard Work sheet to represent the key steps within the action of hosting weekly WIB meetings, as these events represent a vital chance to convert new club attendees into committed, paying members. Reflecting on the Standard Work sheet I created, it became clear to me that the following improved steps, that address my aforementioned key question, will encourage the overall retention and engagement of WIB meetings attendees:

<u>Improved Step of Sub-Process</u>	<u>Purpose Behind Step</u>
1) While introducing the club, emphasize that the club is open to all genders, majors, and backgrounds.	Help audience members to understand the welcoming, flexible nature of the club, so that word-of-mouth promotion may occur and help to encourage newcomers of all backgrounds.
2) Close out meetings by reminding attendees of the benefits and perks of being a paid member.	Leave attendees with a lingering message about the appeal behind choosing to be a committed, paying member of the organization.
3) Project a QR code on screen for an End-of-Meeting Survey to assess the satisfaction, level of engagement, likes, and dislikes of the meeting's attendees.	Provide attendees with a platform to voice their preferences and potential dislikes; Collect data on potential patterns on aspects of meetings that attendees enjoyed and would like to see again.

Overall, through standardizing the process of conducting WIB club meetings, I discovered new ways to consistently engage meeting attendees and guide them to feel welcomed and heard. Considering that my overall intention behind this project was to improve the engagement and retention of WIB members, this tool propelled me to rectify the structure of WIB meetings, which play a fundamental role in making attendees feel inclined to continue participating in the club.

## CONTROL

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### *Tool 10: Project Closeout*

**WHY:** As we reach the end of the DMAIC sequence and the final tool of the “Control” phase, utilizing a Project Closeout is a key tool for establishing a definitive ending to the project at hand. Many organizations have an unfortunate pattern of neglecting to provide clear guidelines for the end of a DMAIC project, so it felt crucial for me to establish closure and reflect on whether the CTQC’s from the “Define” phase were met and will therefore allow my customers to feel satisfied. A Project Closeout is particularly beneficial in the “Control” phase, as it acts as a way to “wrap up” the previous steps taken, to reflect on the effectiveness and efforts behind the improvement steps taken, and to verify that the previous analysis and actions have been consistent. I personally chose to conclude my project with a Project Charter to explore whether or not my customers–WIB members–had their CTQC’s met, and if genuine, consistent improvements had been made that will be effective on a long-term basis. As a whole, the Project Closeout tool is suitable for my particular project because the actions taken by WIB, including hosting weekly meetings and performing outreach, are recurring and must therefore be effectively and consistently repeated to be impactful on the organization’s wellbeing and financial security.

## Tool 10: Project Closeout (Continued)

Date: 8/25/2022      Project Manager: Zara Budreika      Contact Info: (858) 281-3162  
 Project Name: WIB Club Engagement      Project Sponsor: Abigail Dorman  
 Project Description: Improve engagement      Customer Contact: Women in Business-WIB      Contact Info: cpwomeninbusiness.com

Reference Number	Requirement	Relevant CTQC	Impact of Requirement + Description of How the Requirement is Measured	Target	Value	Date
1	Perform outreach specifically towards 3rd, 4th, and 5th-Year students.	Each member is welcomed, respected, and included.	Performing more outreach specifically towards upper-grade level students at Cal Poly will increase the number of new members who pay membership dues and are committed members of the club, which will decrease WIB's reliance on external sponsorships and funding. Data on new member interest will be collected and measured.	Increase number of new 3rd/4th/5th-Year memberships by 10%	Waiting	9/10/2022
2	Promote WIB to students outside of the Orfalea College of Business (OCOB).	Each member is welcomed, respected, and included.	This action will increase the number of meeting attendees and accordingly, increase the likelihood of taking on more paying members of the club. Overall, this will increase WIB's internal funding. Data will be gathered on new members' majors and membership status (paid/non-paid).	Increase number of new memberships from non-business majors by 10%	Waiting	9/10/2022
3	Promote WIB's inclusivity policies via email, emphasizing that all genders, majors, and backgrounds are welcome.	Each member is welcomed, respected, and included.	The more that WIB promotes the inclusivity of its club, the higher the likelihood of new, paying members, that will span beyond just business and business-related majors. Data on email contents and # of clicks, indicating interest toward club, will be compiled.	Increase efficiency of engagement through inclusion and diversity efforts	Waiting	9/10/2022
4	Create a template for thorough PowerPoint intro slides that effectively introduce and explain the WIB club, its board members, and membership	Provide an overview of key WIB board members during each club meeting.	Creating a template for how to effectively format PowerPoint slides will better engage meeting attendees, and will increase WIB's retention of members.	Increase efficiency of engagement	Task Completed	8/20/2022
5	Brainstorm intriguing meeting topics and speakers for the upcoming quarter.	Feature speakers who are interviewed about a range of topics.	By crafting interesting topic and speaker options, this will aid the WIB club to better engage and intrigue its meeting attendees. This will lead to an overall increase in paying, committed members.	Increase efficiency of engagement	Task Completed	8/20/2022
6	Brainstorm new resources and perks for being a paying member of WIB.	Have funds to provide exclusive social events for paying WIB members	Creating new options for resources and perks for those who pay WIB membership dues will entice more individuals to opt into paying for membership, and lead to higher satisfaction levels of customers.	Increase efficiency of engagement	Task Completed	8/23/2022
7	Increase number of paying club members by 30% from 2021-2022.	Have funds to provide exclusive social events for paying WIB members	The overall intention to increase paid memberships will decrease WIB's reliance on external funding, and will increase the club's funding for giving back to its members. This requirement will be measured via an annual survey containing data on those who paid membership dues.	Increase number of paid memberships by 30%	Waiting	8/20/2023

### *Tool 10: Project Closeout (Continued)*

**INTERPRETATION:** The Project Closeout tool served as an excellent way to review the crucial steps taken to improve an overall process, which, in this case, was the process of engaging and retaining WIB club attendees. Adding on, this tool was useful for seeing which sub-actions within my overall process remain in process and therefore need to periodically be reanalyzed. The Project Closeout tool was a very fitting tool for the “Control” phase of this project, as it clarified which mechanisms have been securely put in place to ensure my process has been improved, and which actions still need to be monitored and therefore remain ongoing. For me personally, I found that the Project Closeout tool helped to show that I have completed 3 actions and still need to wait for the remaining 4 steps to come to fruition. The following three actions were completed: 1) Create a template for thorough PowerPoint intro slides that effectively introduce and explain the WIB club and its membership perks, 2) Brainstorm intriguing meeting topics and speakers for the upcoming quarter based on student interests, and 3) Brainstorm new resources and perks for being a paying member of WIB. These three requirements have a large effect on the success of WIB’s retention and engagement efforts, and will ultimately lead towards more students opting into paid membership options. As a result of an increased number of paid memberships, WIB will rely less on external funding for club activities and benefits, and will be able to give back to its members more frequently. The remaining requirements are expected to be completed in the future, with most expected to be completed prior to the Fall Quarter of 2022, when WIB will resume its meetings. Overall, the retention and engagement of WIB members appears to have been enhanced greatly, and to maintain these improvements, I, along with the WIB committee, must adhere to the DMAIC sequence and Lean Six Sigma methodologies.

## APPENDIX

- Link to WIB “2021-2022 WIB Membership Agreement”:  
[https://docs.google.com/spreadsheets/d/1ZGFsu-fQD4W1xE2q8tbpJ6FVJ\\_BMeh2RflcHC3VWyk/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1ZGFsu-fQD4W1xE2q8tbpJ6FVJ_BMeh2RflcHC3VWyk/edit?usp=sharing)

### Shingo Model Assessment

This data supports the work of Central Coast Lean in building a community of lean practice.

\* Required

#### Applicability Information

Provide some information on the organization (e.g. Company, department, area, team) to which this assessment applies.

Organization name (optional)

#### Cal Poly Women in Business (WIB)

Activity Identifier (i.e. LSS project, workshop, forum, Summit, survey, other)

LSS Green Belt Project

LSS Black Belt Project

#### LSS Mini-Project

Forum

Summit

Workshop

Lean community survey

Other:

Industry \*

#### Academic Services

Level \*

#### Entire organization

Division

Department

Function

Team

Other:

### Dimension 1: Cultural Enablers

Rate your agreement with each statement based on your organization's cultural enablers.

On-the-job coaching in lean practices is a daily part of our organization's culture. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Formal lean training and education are ongoing and updated. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

There is a process of flow where suggestions are processed quickly and feedback is received by the originator. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Our organization has a safe and clean workplace where safety and environmental standards are continuously improving. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Our organization's recognition system focuses on performance that encourages ideal behavior and is frequent, timely and specific. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

### Dimension 2: Continuous Process Improvement

Rate your agreement with each statement based on your organization's continuous improvement process.

Our current state and future state is an ongoing continuous cycle that is actively pursued with a visual, detailed action plan and timeline. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Our standards and work instructions are simple and visual for all work processes. They are routinely updated with improvements and are followed with regard to timing and sequence. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Managers and supervisors routinely observe the actual process in order to gather factual data to understand the problems and opportunities. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Zara Budreika

Cal Poly, SLO – OCOB – Marketing Management

Our improvements are made by following a scientific method (PDCA, DMAIC, or A3 thinking). There is a coaching process in place for problem solving and problems are addressed in the lowest possible level of the organization. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

All problems, defects and abnormal conditions are signaled and stopped immediately at the point of occurrence and the root cause is pursued. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

### Dimension 3: Enterprise Alignment

Rate your agreement with each statement based on your organization's enterprise alignment.

We have a structured process for aligning goals and strategic priorities that is simple and visible at all levels of the organization. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Leaders hold to guiding principles through hard times. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Support functions are seamlessly integrated to aid operations in creating value. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Information systems provides a direct flow of pertinent information that is easily accessible and usable across the extended enterprise (no shadow systems or spreadsheets). \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Leaders and managers have a standard work process that enables them to monitor and maintain company alignment. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

### Dimension 4: Results

Rate your agreement with each statement based on your organization's measurement system.

Measures are simple and there is a common understanding of what is measured and why it is measured. Measures are directly tied to the organization's overall objective. \*

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Zara Budreika

Cal Poly, SLO – OCOB – Marketing Management

Measures are used to drive improvements. \*

Strongly Disagree 1 2 3 4 **5** 6 7 Strongly Agree

Performance measures drive the right behaviors. \*

Strongly Disagree 1 2 3 4 **5** 6 7 Strongly Agree

Tracking boards are routinely used for open discussion and feedback so that adjustments can be made. \*

Strongly Disagree 1 2 3 4 **5** 6 7 Strongly Agree

Principles, systems and tools are aligned to help achieve performance targets. \*

Strongly Disagree 1 2 3 4 5 **6** 7 Strongly Agree

Other comments

Your answer

**N/A****Identification Information (optional)**

This information allows Central Coast Lean to contact you for clarifications or to share summary data (anonymous) feedback.

First Name (optional)

**Zara**

Last Name (optional)

**Budreika**

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