

EBO PROCESS WORK INSTRUCTIONS

The EBO Process is intended to identify and complete tasks, projects, and objectives that are above and beyond an employee's normal duties. They tend to be things that are important, but not necessarily urgent, such as personal growth, work area improvements, organization efficiency, cost reductions, product improvements, etc.

Work Instructions:

Every three months employees submit a one-page EBO Form to their supervisors listing tasks, projects, and objectives they want to pursue. An EBO meeting is scheduled. The EBO meeting has three steps:

Note: The employee brings to the meeting:

- Copy of previous EBO
- Copy of new EBO

Step 1: Review the Previous EBO Form

- The supervisor and the employee review the previous EBO action items with a focus on the "A" items in the order of their priority – A1, A2, A3 . . . (see Step 3 for explanation of prioritizing.)
- Each item is discussed, and the appropriate symbol is marked in the Completion Status column.
- Symbols used to track action items are:
 - Completed (check mark)
 - Planned Forward (right-pointing arrow)
 - Deleted (X)
 - Delegated to (})
 - In Process & Planned Forward (a period).
- Every action item requires a Completion Status symbol. No action items are to be dropped or ignored.

Step 2: Review the New EBO Form.

The new EBO Form is reviewed with the employee explaining and discussing each new action item with their supervisor. Both may brainstorm and discuss additional action items and add them to the EBO Form.

Step 3: Prioritize the New EBO Form.

- "A" ITEMS: Items that are approved and require action within the next three months are given an "A" priority.
 - "A" items are numbered A1, A2, A3, etc. in order of their importance.
 - There can be a maximum of 10 prioritized "A's".
 - Some "A" items may be unprioritized (A-), especially if they depend on others to initiate an action before they can be undertaken.
- "B" ITEMS: The less important action items which may optionally be completed in the quarter are given a "B" priority.
- "C" ITEMS: Action items that are expected to be further discussed and potentially approved at the next EBO meeting.
- "X" ITEMS: Items that are rejected. The employee may use the feedback from the supervisor to modify a rejected EBO idea for inclusion on a future EBO.

EBO - EXCELLENCE BY OBJECTIVE

Living Our Shared Values - Accountability, Agility, Integrity, Passion, and Excellence

Completion Status	
√	Completed
→	Planned Forward
X	Deleted
}	Delegated to: _____
•	In Process & Planned Forward

Date: _____
Qtr. Start: _____

Employee: _____
Approval Review by: _____ Date: _____
Completion Review by: _____ Date: _____

Priority (A1, A2, A3 . . ., A-, B, C, X)

		EBO Action Items
√	A-	1. Take a night course or seminar or read a book that grows your knowledge, capabilities, skills, etc.
•	A3	2. Purchase and learn to use a key piece of technology to speed the efficiency, expand effectiveness, improve customer satisfaction, etc.
√	A1	3. Investigate alternatives to a process in an existing system that is causing difficulty for yourself, fellow employees, customers, or suppliers.
√	A2	4. Develop a tool or fixture that reduces assembly time or cost, or eliminates a troublesome step.
•	A5	5. Focus on changing a habit that is important to your long-term health or success.
√	A4	6. Volunteer to join or lead a group investigating an opportunity for positive change.
→	C	7. Take on the responsibility to be the back-up for a fellow employee's key duties, especially if it advances your career in the desired direction.
√	B	8. Volunteer for a community service activity you are passionate about.
X	X	9. Purchase new Maserati company car and learn to operate.
SAMPLE		

COMMENTS: _____

