



JOINTPIVOT

OPERATIONAL EXCELLENCE

PART 1: CREATING A SOLID STRATEGIC PLAN

June 3rd, 2021



We partner with business leaders to dig down to the root cause of their issues, **solve problems**, and **create opportunities** right at the **pivot point**.

Using our **training** and **experience**, we deliver **creative plans** and **solutions**, utilizing our talent or training yours.

What We Do



Doing

- Strategic Planning Sessions
- Continuous Improvement Projects
- Full-Service Project Management
- Change Management
- Individual and Executive Coaching
- Employee and Leader Development



Teaching

- Customized Curriculum Development
- Onsite or Online Training Options
- Lean and Six Sigma Programs
- Project Management
- Employee and Leader Development
- Change Management at all Levels



Speaking

- Keynote Presentations
- Workshops
- Conference Sessions
- Employee and Customer Events
- Professional Meet Ups



The **JOINTPIVOT** Operation Excellence Components



4 Part Series

Session 1

Strategic Planning: Define your vision, create your roadmap, watch for blind spots, and execute

Importance of having a plan
1 year vs 3 year
Directions vs yearly goals

JUNE 3

Session 2

Problem Solving: Using continuous improvement thinking to reduce waste, drive change and empower your team

Problem | Objective Statement
Root Cause
Process Mapping Basics
7 Forms of Waste
Standard Work

JUNE 24

Session 3

Get Sh*t Done: Learn the basics to success in execution and getting work done

All things planning
How to create plans
Execute plans
Lead people through plans
Risk mitigation

JULY 15

Session 4

People, Leadership And Change: The foundation to your success

Being a change leader
Focusing on your people
Creating development opportunities

AUGUST 15

Goals And Agenda



Awareness – What is Operational Excellence?



Strategic Planning and Keys To Success



Hear, See, Do: Hands on exercise



Leave today's training ready to apply the concepts



Get excited for Session 2, June 24th

Survey # 1



I want to learn.....

1. How to help my company grow, effectively and efficiently.
2. What the heck operational excellence is, and why I should think about using it.
3. How to improve my business, cost, speed, service, etc.
4. How to help my current and future talent.
5. How to implement more structure.
6. How to solve problems.
7. How to change thinking from individual process to entire system.
8. Something else

Operational Excellence

The JOINTPIVOT Operation Excellence Components



It is a foundational approach to how companies do business. It is a mindset, not a series of activities you perform.

Strong focus on People, Process, Strategy and Systems and the elements that support success

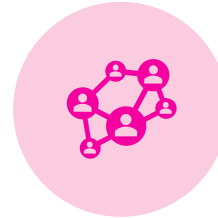
It is a journey that demonstrates an investment in people, quality, service and cost -> Positive impact on the bottom line.

It enables leadership to build their values into the way the company operates, measures performance, instills ownership, accountability, and demonstrates commitment to the vision.

Why We LOVE It



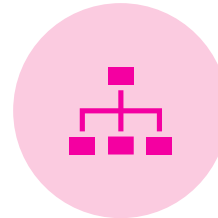
Strong **company culture** and **performance** = Long term, sustainable growth



Holistic approach **engages all levels of employees** and demonstrates a commitment to their development and contributions



Establishes assurance that all areas of the **business** and all **employees are important**




























Structure, measurable processes support improvements to performance, profitability, decision making, customer service, and partnerships



All parties understand **vision** and **direction**, and **leadership** places a system in place to achieve success

Can it work for you?

	Plan for future	Strategic, Systematic approach	Process Driven	Instills values	Commitment to people
Start up – With funding					
Start up – Without Funding					
Small Business					
Medium Business					
Large or Corporate Business					

Does it look and feel the same? No! But the foundational concepts are no different.

What's holding you back?

JOINTPIVOT

How many are you checking off?

<input type="checkbox"/>	The competition isn't doing it
<input type="checkbox"/>	You like silver bullets
<input type="checkbox"/>	You struggle with commitment
<input type="checkbox"/>	You change course at every bump
<input type="checkbox"/>	You have trouble investing in all of your people
<input type="checkbox"/>	You lack trust
<input type="checkbox"/>	You make assumptions that people get it and already operating in this manner
<input type="checkbox"/>	You don't understand systems, only individual silos and processes
<input type="checkbox"/>	You're good with tools, but not changing culture
<input type="checkbox"/>	You don't have enough of the right people
<input type="checkbox"/>	You don't fully embrace at change management methodology
<input type="checkbox"/>	Unsure who is more important: Internal or external customer

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STRATEGY

- Determines the WHAT, not the HOW
- Intentional and focused high-level long term thinking and change
- Sets the goals and objectives
- Focused on defining the future
- Typically formed by top leaders within the organization
- Difficult to measure
- Strategic planning does not include the execution details
- Strategy is intangible

**Where do you
feel more
comfortable?**

**Are you
actually
doing tactical
planning?**

TACTICS

- Putting the strategy into short term actions
- Is the HOW behind the WHAT
- Involves concrete actions, steps and metrics
- Requires day to day execution and accountability
- Easier to pivot and change
- Typically defined and executed by managers
- Tactical plans include timelines and implementation strategies
- Tactics are intangible

Adapted from: <https://www.techello.com/strategy-vs-tactics/>

Where We're Starting...

...Awareness of Strategic Planning

It's a process, not a crystal ball

Completed exercises, data gathering, current state, SWOT, and more

Knowledgable on measurements, processes, talent

Understand priorities, vision and mission

What is Strategic Planning?

“Strategic planning is an organization’s process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy.”

- Wikipedia



“A plan of action or policy designated to achieve a major or overall aim.”

- Dictionary.com

Why we Love Strategic Planning

- A business strategy creates a **vision** and **direction** for the **whole organization**.
- A strategy can provide this **vision**, keeps the organization **motivated** and **focused** on the journey.
- It is important that all people within a company have **clear goals** and are **following the direction**, or mission of the organization.



Things to Consider

What Works Best For You?

Directional Strategy

- Selecting specific area(s) to focus to achieve results and place the majority of efforts

How many years are you focusing on?

- Long vs short
- Shiny object syndrome

Hoshin Kanri / Strategic Deployment / Managing For Results

- Ensures strategic goals of a company drive progress and action at every level of the organization
- Eliminate waste (time, re-work, unused talent, etc.) from inconsistent direction and poor communication
- Ensures companies do not lose sight of their goals and objectives

SWOT Analysis

- Strength, weakness, opportunities, threats

How often do you revisit?

- Monthly, quarterly, yearly?

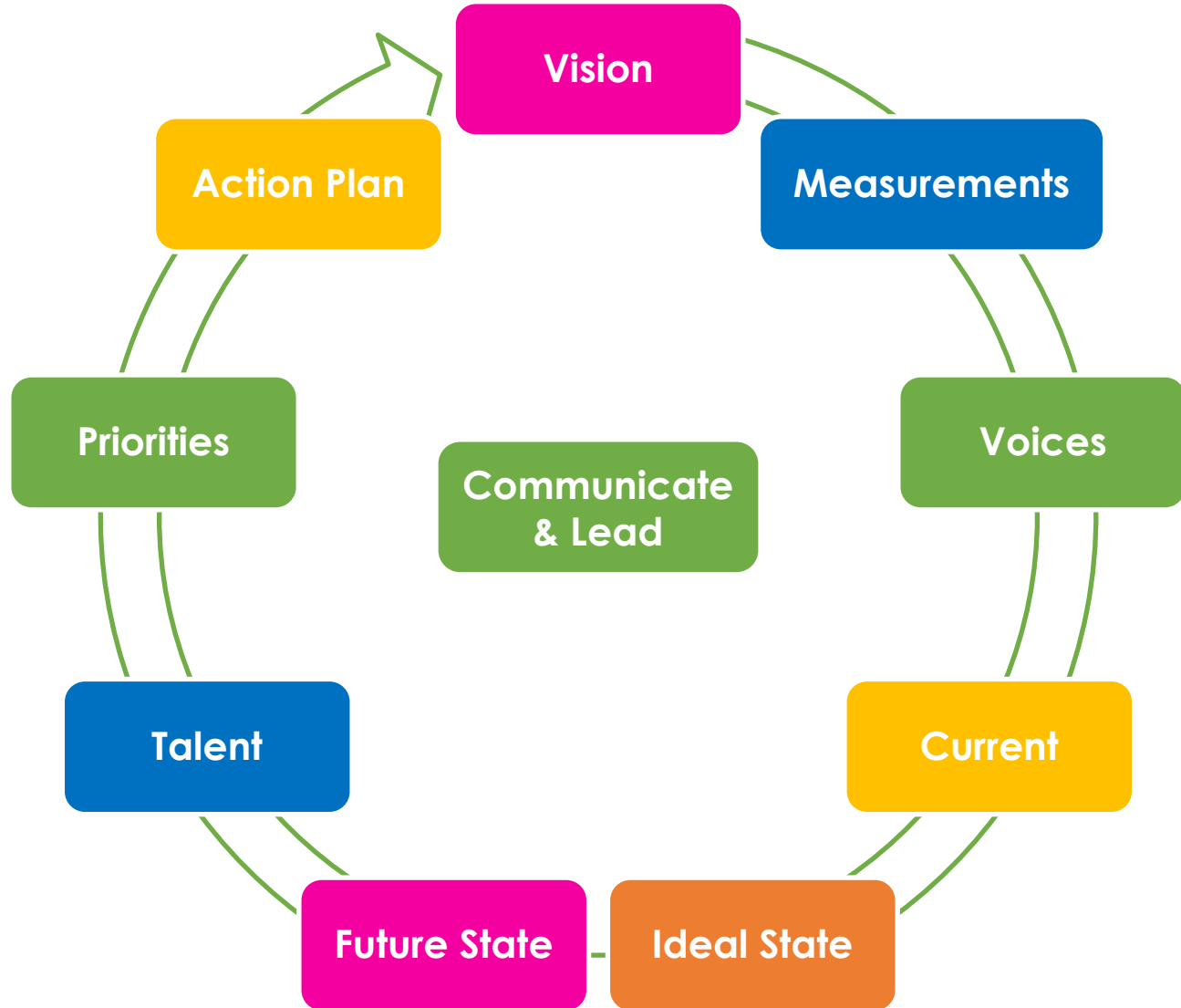
Your Strategic Planning Style: Is it working?

- Will it help you beat the competition?
- Giving you an advantage?
- Does it fit your planning style or culture?
- Do you think you're leaving something on the table?
- Are you accomplishing your initiatives?
- Does it feel like something is missing?
- Are you knocking it out of the park?
- Does it embrace uncertainty?
- Is it flexible?
- Is it contaminated by bias?
- Is there conviction to execute?



PLAN TO WIN

FOCUS
ON THE
PROCESS



TAKE OWNERSHIP ON YOUR IMPACT



Vision:
Destination,
impact on the
community,
environment,
industry



Measurements:
Provide direction
on winning or
losing



Voices:
Necessary from
multiple sources



Current State: All
encompassing
look at the
current state
processes



Ideal: Ultimate
state



Future: Realistic,
yet challenging
expectations



Talent: Defined
requirements
that will support
ideal state



Priorities: What is
most important
when it comes to
cost, quality and
service



Action Plan:
Who, what,
when

Measurements, Data, Indicators, Oh My!

KPI's, Metrics, OKR's, Scorecards

WHAT

- Quantitative measurement that provides information on performance
- Leading vs lagging
- Decisions, status updates, understand progress

WHY

- Understand current state
- Change course, do more, remove costs, plan for investors, add employees, sell, buy, trends, patterns, figure out where your biggest problems are
- We see, know and learn together
- Targets, goals, accountability, progress and celebrations

HOW

- Keep it simple
- Focus areas
 - Growth – Sales, Marketing, Leads, development lead time
 - Operations – Cost to produce, lead time to fill, inventory
 - Quality – Defects, turnover, customer satisfaction/retention

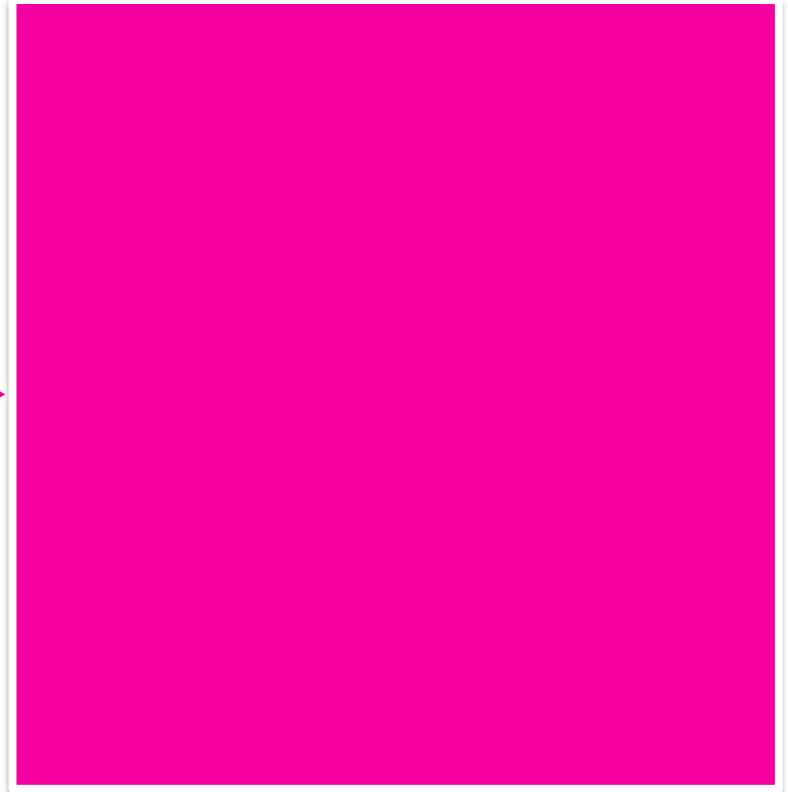
What do your numbers tell you?



Question	Measurement #1	Measurement #2
What is it? Description or title		
Why do you believe this is a good or necessary indicator?		
Does it link to a strategic objective? If yes, which one?		
Does it drive decisions? Provide info or status update? Show progress?		
Leading or lagging indicator?		
How is this information collected?		
Who uses this information?		
Who will collect this information? Who will share it?		
What is the frequency this info will be collected and shared?		
When is this KPI no longer needed?		

5 Minute Hands On Application

- 1) Review the handout provided – tab 'Measurements'
- 2) Fill in the blanks with your current numbers
- 3) Group review – Answer in chat



Processes

They're Good For Everyone

WHAT

- A series of steps which, using resources, convert one or more inputs together and create value for the customer
- Processes are often invisible or unnamed
- Multiple processes make up an operational system

WHY

- Everything is connected. Pulling any lever will have an affect on another part of the operation
- Visual, Onboarding, training, communication
- Problem solve
- Identify inputs, outputs, suppliers and customers
- If isn't not documented, does it really happen?
- Make no assumptions

HOW

- Visualize a series of steps in current order of operation
- Swim lane, decision tree, value stream mapping
- Use the people that perform the work, observe, ask questions, find out why

If it's not documented, how do you know what you are doing?

The benefits of process visualization

IT: Setup Laptop for new employee



Hiring manager

Confirmed start date

Review form

Working laptop (on time, at the right place)

New employee

HR

7 days notice

Order lap top per request,

Confirmation to HR and Hiring manager of completion

Hiring manager

Laptop Supplier

Completed 'new hire' form
Approval from HR and Hiring Manager

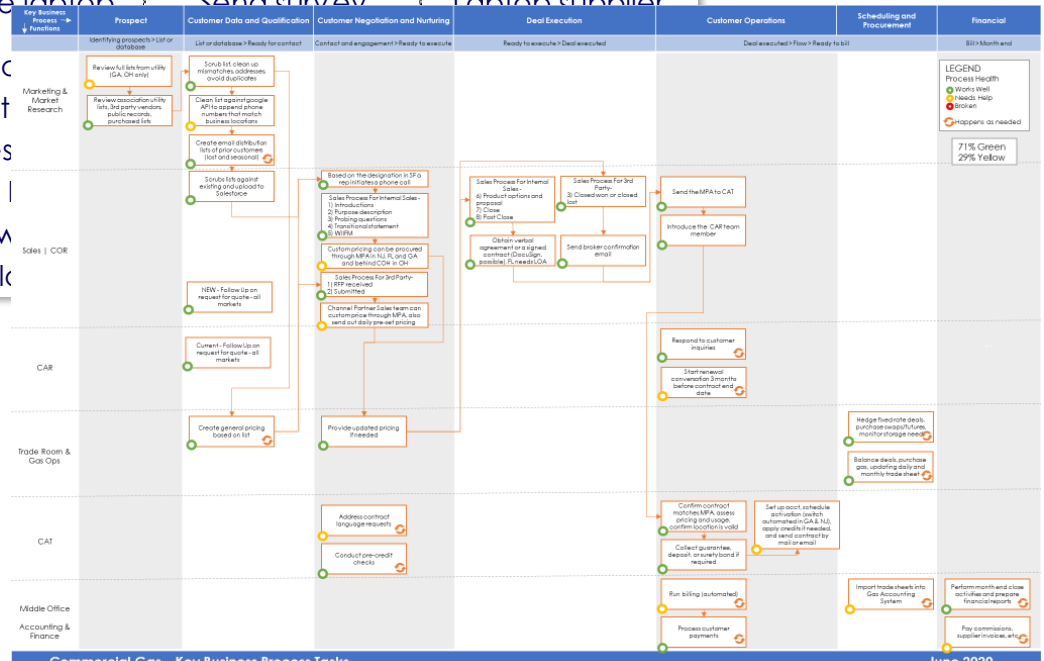
Receive laptop

Send survey

Laptop supplier

EXAMPLE

Upload application request
Set up laptop review with employee



Talent – The Human Energy Behind Processes and Systems

WHAT

- Identifying the right combination of skills sets, competencies and experience
- Talent philosophy – Jack of all trades, risk takers, etc.
- Knowing when to hire, develop, promote and offboard

WHY

- The right talent, at the right time, will help your business achieve expected results
- Remove headaches, increase speed
- Empower vs command and control
- Fill in the gaps of your skills and abilities

HOW

- Identify what skills and experience are necessary to achieve goals
- Identify the gap in your/current employees skills
- Tactical vs strategic vs outsource

Are you ready to take action?



- You've received money and are about to grow and are worried about burn out, wasting money and time.
- You are attracting investors and want to be buttoned up and ready to impress!
- You're in steady state mode, but ready to take it to the next level with growth.
- You have a lot going well, but there's not a lot of control, and you're unsure if you're winning.
- Everyone is running around, and well, everyone is running around
- You figure it out day by day.
- You are leaving a lot of opportunity on the table, due to lack of control, process and the right talent.
- Your people are great, but will they get you where you going?

JOINTPIVOT

Are you happy
with the
progress you
are making?



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www.jointpivot.com

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