OPERATIONAL EXCELLENCE

PART 3: GETTING IT DONE!

July 15th, 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

JOINTPIVOT

The **JOINT PIVOT**
Operation Excellence
Components

Goals And Agenda

How to organize the work

Creating plans to get it done

Anticipating and mitigating risk

Communicating the plan

Get excited for Session 4, August 5th

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Operational Excellence

The JOINT PIVOT Operation Excellence Components

PROCESS
PEOPLE
SYSTEMS
STRATEGY

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.
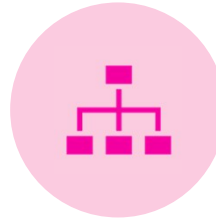
Why We LOVE It

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

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Can it work for you?

	Plan for future	Strategic, Systematic approach	Process Driven	Instills values	Committement 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.

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What's holding you back?

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

How many are you checking off?

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Part 1 Recap

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 he 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

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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 ac
or policy
designated
achieve a m
or overall ai
- Dictionary.com

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PLAN TO WIN

FOCUS ON THE PROCESS
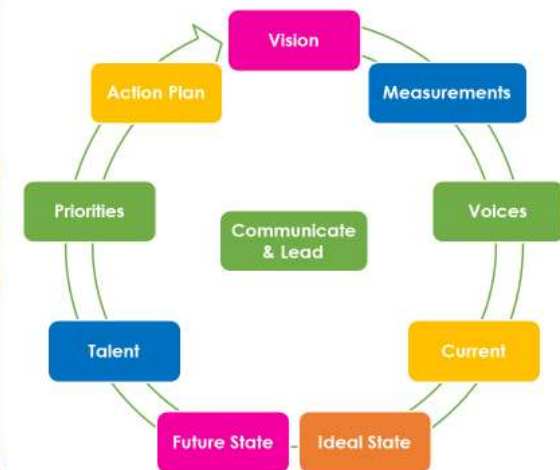
- Vision
- Measurements
- Voices
- Current
- Ideal State
- Future State
- Talent
- Priorities
- Action Plan
- Communicate & Lead

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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
- Underst...
- Chang... more, plan f... empl... trends out wl... proble...
- We see... togethe...
- Targets... accoun... and ce...

HOW

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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 rig... right ti... your b... expec...
- Remov... incre...
- Empov... comm... contro...
- Fill in tl... skills a...

HOW

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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

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

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Part 2 Recap

How do you know what to work on?

Strategic Projects: Prioritized and scoped to achieve your defined goals and work towards your vision

Business development

Developing service or product

Scaling

Talent

Infastructure

Everything Else: : Activites that move the needle and support the delivery of results

Immediate needs

Problem solving

Doing your job

Communications

Meetings

Follow up

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Project Selection Matrix

The four attributes of a potential project can be visualized on the following matrix:

(1) Impact/Benefit — High / Med / Low

Increasing Desirability

(2) EFFORT — Low / Med / High
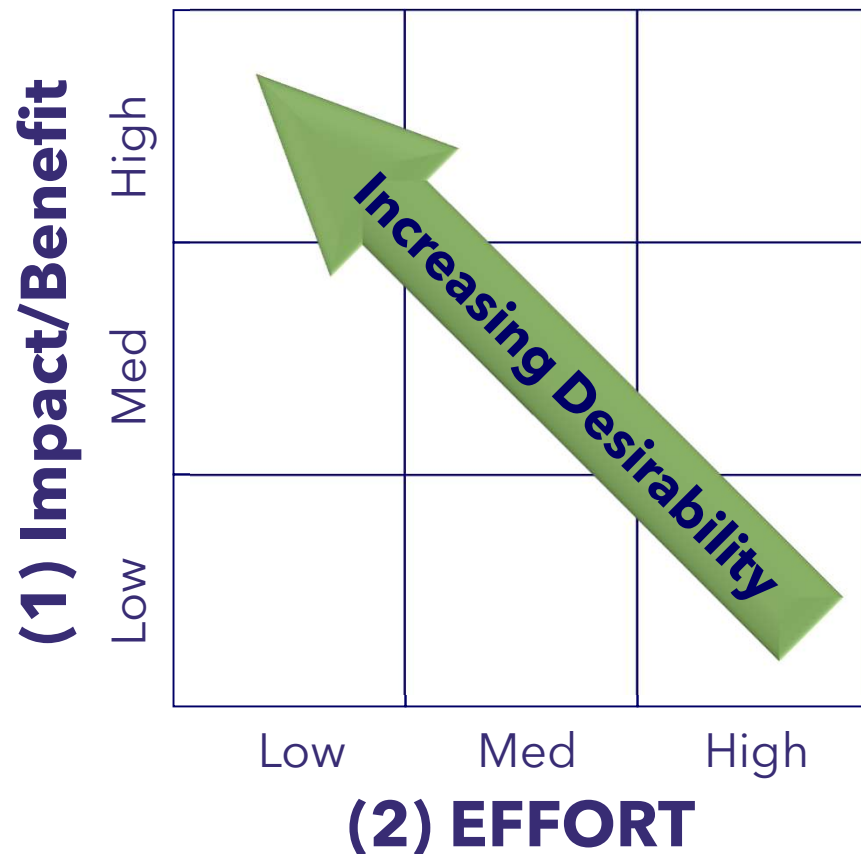
(3) Probability of Success

- Low
- Med
- Hi
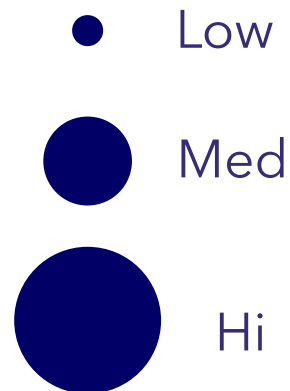
(4) Change Saturation

1. Qty Of People
2. % of Job
3. Other

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Part 2 Recap

Part 2 Recap

Start with what you are experiencing

Problem | Opportunity Statements

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Why are we doing this, what is prompting us to spend time and resources on this now?

Your problem or opportunity statement should capture the current state of the issue.

It should be two or three sentences you use to explain the problems to someone.

- **It should answer:**
  - What are you experiencing, and do you have data to support?
  - During what time frame?
  - What is the impact of the problem or opportunity
    - Such as dollar impact, missed opportunities, mistakes, rework, and time
  - What is it costing us not to address this?

Your objective statement should capture the purpose of why you need people's time to identify the root cause and implement a solution.

There should be NO solutioning, only painting the picture of what the impact could be.

It should be two or three sentences you use to sell the vision on what the outcome would look, feel, .

What do you see happening when you are done?

Objective Statements

- **It should answer:**
  - At a high level what you want to fix – not how!
  - The improvement to the metric(s)
  - The financial impact of improving that metric or process if possible
  - When you want to have it done by

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Finding Root Cause: Fishbone

Ingredients
- Clamato Juice (1)
- Spice level
- Not the right vodka (3)
- Bad condiments
- Warm tomato juice

Process
- Not stirred
- If they are shaken
- Not mixed well, consistent
- Order of ingredients

Location
- Not the correct ambiance
- Too warm of a day (2)
- Not at work
- Bad company

Cost
- Too expensive

Bad Bloody Mary

Materials
- Served in a champagne glass
- Bad/dirty glass, or too small of glass

People
- No pride of ownership

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Part 2 Recap

Part 2 Recap

8 Wastes

Over-Production
- Producing more, earlier or faster than the customer requires
- Printouts, purchasing in bulk, scheduled meetings for too many participants

Waiting
- You're waiting, they're waiting, everyone's waiting!
- System downtime, slow responses, approvals, decisions, uneven workload in processes

Non-Utilized Talent
- People's ability, talents, skills and knoweldge, not their time
- Limited authority & responsibility, command and control environment, inadequate business tools available

(Defects)
- scrap or incorrect information
- Fat-fingered, lost information, turnover, trained incorrectly

Transportation
- Unnecessary movements of paperwork, product and material
- Multiple approvals, hand-offs, long workflows

Inventory
- Excess products and materials not being used
- Paperwork, supplies, unread emails, mail
- Purchase orders in queue

Motion
- Unnecessary movements of people
- Printing/copying/faxing, searching on computer, central filing, walking to supplies

Extra Processing
- More work or higher quality than is required by the customer
- Unused or unnecessary reports
- Expediting
- Inspection
- Multiple approval signatures required

8 Wastes = D. O. W. N. T. I. M. E.
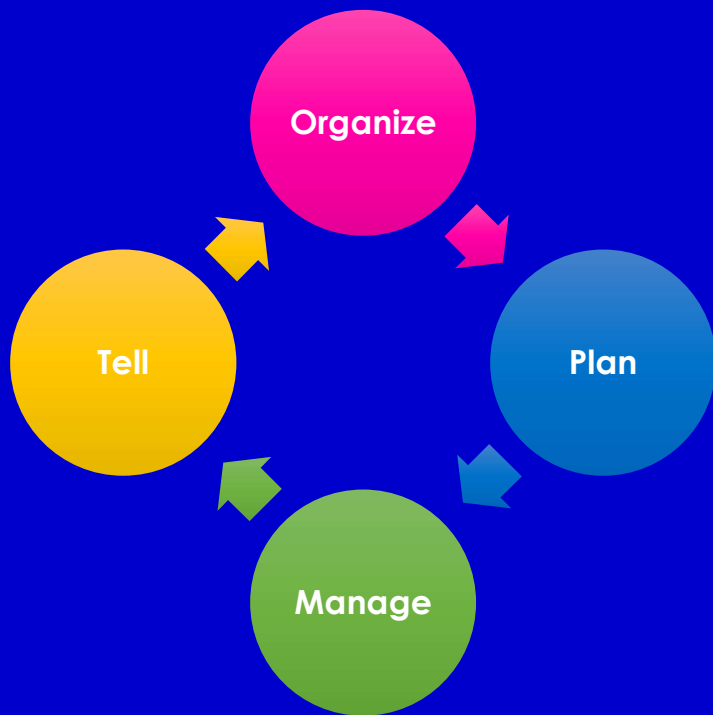
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Now how do we GET IT DONE?

Organize

Plan

Manage

Tell

How to organize the work

Creating plans to get it done

Anticipating and mitigating risk

Communicating the plan

Work Breakdown Structure (WBS)
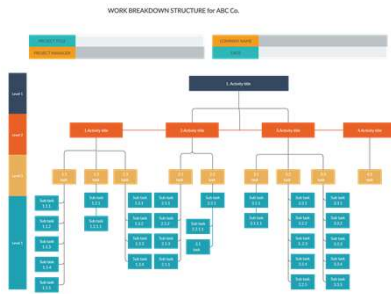
- Pros
  - Great for people who don't like planning
  - Better for those who prefer visual plans and tools
  - Can be high level or very detailed
  - Can easily be turned into a project plan

- Cons
  - Don't show items in chronological order or time to complete
  - Aren't great for showing task dependencies

Great when you don't have specific dates or resources to follow, or if you are just learning to plan

Project Plan or Gannt Chart

- Pros
  - Great for people who love a detailed plan
  - Show task dependencies and linking
  - Can show the critical path (what is most important to the timeline)
  - Can see tasks duration, and by due date

- Cons
  - Can be more difficult to pull together
  - Many people are intimidated by them
  - Much harder to visualize

Project plans are great for when you need a little more detail, and you have milestones that you need to accomplish by specific dates.

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Types of Plans

What goes in the WBS or plan?
3 Easy Steps

01
Defining the tasks that are needed to produce the deliverable

02
Identify any tasks that are related or dependent on each other

03
Estimate the time needed to complete the task

Tasks have deliverables that are always "things"

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PROJECT TITLE

1 Activity Title

1.1 Task | 1.2 Task | 1.3 Task

1.1.1 Subtask
1.1.2 Subtask
1.1.3 Subtask
1.1.4 Subtask
1.1.5 Subtask

1.2.1 Subtask
1.2.2 Subtask
1.2.3 Subtask
1.2.4 Subtask

1.3.1 Subtask
1.3.2 Subtask
1.3.3 Subtask

2 Activity Title

2.1 Task | 2.2 Task | 2.3 Task

2.1.1 Subtask
2.1.2 Subtask
2.1.3 Subtask

2.2.1 Subtask
2.2.2 Subtask
2.2.3 Subtask

2.3.1 Subtask
2.3.2 Subtask
2.3.3 Subtask

3 Activity Title

3.1 Task | 3.2 Task | 3.3 Task

3.1.1 Subtask
3.1.2 Subtask
3.1.3 Subtask

3.2.1 Subtask
3.2.2 Subtask
3.2.3 Subtask

3.3.1 Subtask
3.3.2 Subtask
3.3.3 Subtask

4 Activity Title

4.1 Task | 4.2 Task | 4.3 Task

4.1.1 Subtask
4.1.2 Subtask
4.1.3 Subtask

4.2.1 Subtask
4.2.2 Subtask
4.2.3 Subtask

4.3.1 Subtask
4.3.2 Subtask
4.3.3 Subtask

.1.4 Subtask
.1.5 Subtask

1 Activity Title

1.1 Task | 1.2 Task | 1.3 Task

1.1.1 Subtask
1.1.2 Subtask
1.1.3 Subtask
1.1.4 Subtask
1.1.5 Subtask

1.2.1 Subtask
1.2.2 Subtask
1.2.3 Subtask
1.2.4 Subtask

1.3.1 Subtask
1.3.2 Subtask
1.3.3 Subtask

OUTLINE	
1	Activity Title
1.1	Task
1.1.1	Subtask
1.1.2	Subtask
1.1.3	Subtask
1.1.4	Subtask
1.1.5	Subtask
1.2	Task
1.2.1	Subtask
1.2.2	Subtask
1.2.3	Subtask
1.2.4	Subtask
1.3	Task
1.3.1	Subtask
1.3.2	Subtask
1.3.3	Subtask

WBS

Let's Practice

```
Build a House
├── Foundation
├── Brick Work
├── Painting
├── Draining
├── Plumbing
└── Wiring
    ├── Main Connections
    ├── Light Sockets
    ├── Fuse Box
    └── Power Points
```

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WBS

Let's Practice

Step 1

Task 1:

Task 2:

Task 3:

Step 2

Task 1:

Task 2:

Task 3:

Step 3

Task 1:

Task 2:

Task 3:

Waterfall vs Agile
Two ways to attack a plan

Waterfall

Requirements → Design → Development → Testing → Deployment

Big outcome at end

Agile

Req's → Design → Test → Develop → Deploy (×3)

Cumulative outcomes
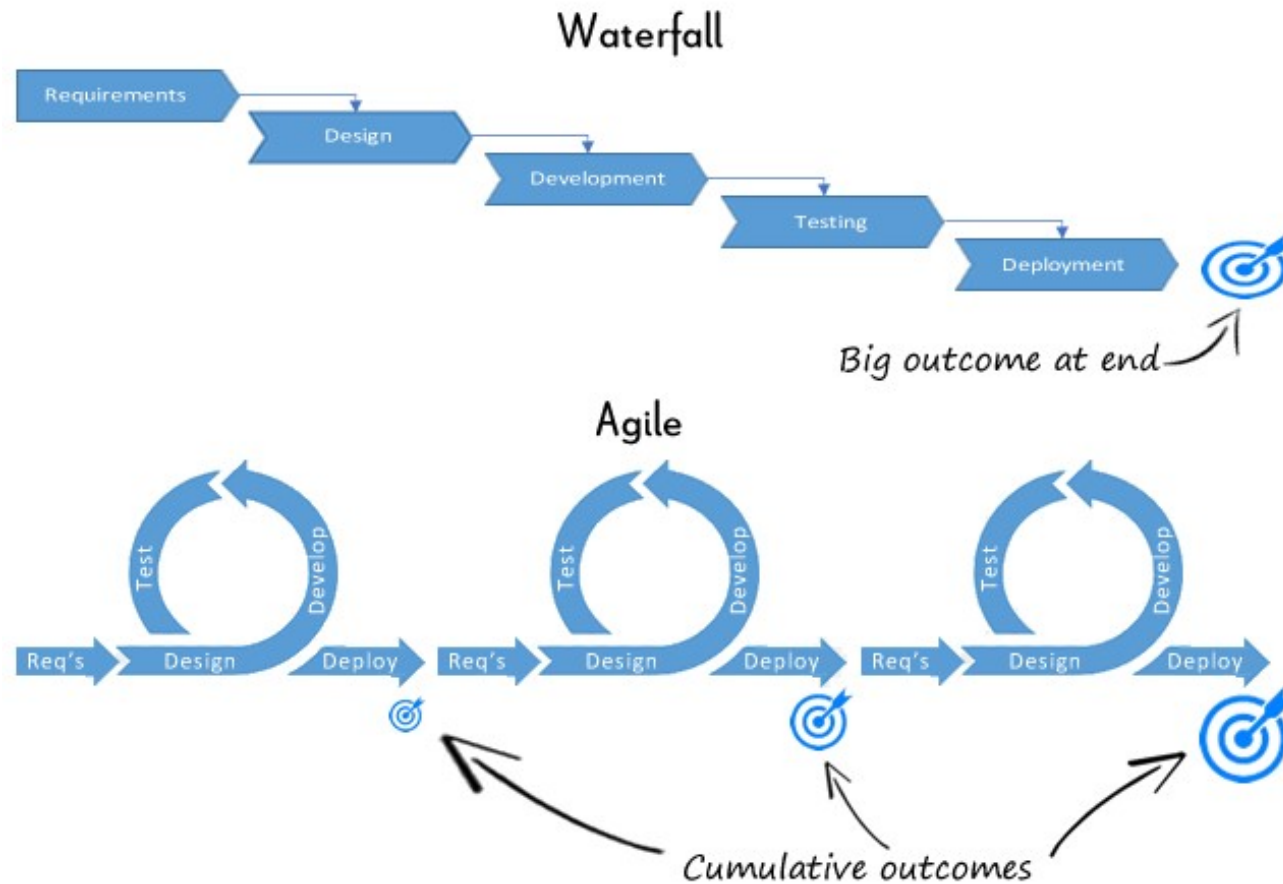
Terminology

Task name	Description of the task that the project team will understand
Status	On / Off / Complete / Hold Not Started / In Progress / Complete Canceled or N/A
Start Date	When you need to start the task
End Date / Finish Date	When you need to finish the task
Assigned to	Who is responsible (only 1 person!)
Group / Function	What team owns the task
% Complete	0/25/50/100 or percentages
Duration	How many days or hours to complete
At Risk	This task has issues or may not get done on time, help!
Dependencies	What needs to get done before I start this task, or what others are waiting for it?
Milestone	A completion of a phase or decision

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Two Project Plan Templates

Gantt Chart

Use when you need to see a visual, or to easily see where tasks are dependent or overlap

For more complex plans with 50+ tasks

Simple Grid

Use when you just need a simple plan to organize yourself

For easier plans with <50 tasks

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Or combine them!

WORK BREAKDOWN STRUCTURE WITH GANTT CHART TEMPLATE

DATE							PHASE ONE		

WBS NUMBER	TASK TITLE	TASK OWNER	START DATE	DUE DATE	DURATION	% of TASK COMPLETE	WEEK 1 (M T W R F)	WEEK 2 (M T W R F)	WEEK 3 (M T W R F)
1	Project Conception & Initiation								
1.1	Project Charter	Leon W	3/12/2022	3/15/2022	3	100%			
1.1.1	Project Charter Revisions	Kylie R	3/15/2022	3/16/2022	1	100%			
1.2	Research	Pete S	3/15/2022	3/21/2022	6	90%			
1.3	Projections	Steve L	3/16/2022	3/22/2022	6	40%			
1.4	Stakeholders	Allen W	3/17/2022	3/22/2022	5	70%			
1.5	Guidelines	Malik M	3/18/2022	3/22/2022	4	60%			
1.6	Project Initiation	Malik M	3/23/2022	3/23/2022	0	50%			
2	Project Definition & Planning								
2.1	Scope & Goal Setting	Steve L	3/24/2022	3/28/2022	4	5%			
2.2	Budget	Allen W	3/29/2022	4/2/2022	4	30%			
2.3	Communication Plan	Malik M			0	0%			
2.4	Risk Management	Malik M			0	0%			
3	Project Launch & Execution								
3.1	Status & Tracking	Pete S			0	0%			
3.2	KPIs	Leon W			0	0%			
3.2.1	Monitoring	Kylie R			0	0%			
3.2.2	Forecasts	Kylie R			0	0%			
3.3	Project Updates	Pete S			0	0%			
3.3.1	Chart Updates	Malik M			0	0%			
4	Project Performance / Monitoring								

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PLANNING TIPS

You should have a role, person, or skill level in mind when estimating a task

Parkinson's law – the work expands to fill the time allowed!

Error on the higher side of average

For those managing larger initiatives, get estimates from multiple people

Complete a lessons learned to review the accuracy of the estimates – this requires you to track time

Plan for and mitigate risk

	To be tracked	To be managed
Threats	RISK	ISSUES
Reliance	ASSUMPTION	DEPENDENCIES

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What is a RAID log?

Risk - is something that will have a negative impact on the project if it happens, typically given an RPN (see next slide)

Assumption - are those factors that are taken for granted but cannot be guaranteed and may impact the result of the project, such as staff availability

Issue - are incidents that cause the project to become out of alignment. They are risks that have already happened

Dependency - are those activities which need to start or be completed in order for the project to proceed successfully

What is an RPN?

- The RPN is calculated by multiplying the three scoring criteria:
  - Severity
  - Occurrence or Likelihood
  - Detection

- RPN = Severity x Occurrence x Detection
- The higher the number, the bigger the risk and attention

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What is an RPN?

Rating	Severity of Effect	Likelihood of Occurrence	Ability to Detect
10	Hazardous without warning	Very high: Failure is almost inevitable	Can not detect
9	Hazardous with warning		Very remote chance of detection
8	Loss of primary function	High: Repeated failures	Remote chance of detection
7	Reduced primary function performance		Very low chance of detection
6	Loss of secondary function	Moderate: Occasional failures	Low chance of detection
5	Reduced secondary function performance		Moderate chance of detection
4	Minor defect noticed by most customers		Moderately high chance of detection
3	Minor defect noticed by some customers	Low: Relatively few failures	High chance of detection
2	Minor defect noticed by discriminating customers		Very high chance of detection
1	No effect	Remote: Failure is unlikely	Almost certain detection

What is a RAID log?

Tracks your Risks, Assumptions, Issues, and Dependencies

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Communications planning

You made it this far, don't fumble at the goal line!

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THE ADKAR MODEL

A Awareness of the need to change

D Desire to support the change

K Knowledge of how to change

A Ability to demonstrate skills and behaviors

R Reinforcement to make the change stick

Enablement Zone

Engagement Zone

https://www.prosci.com/adkar/adkar-model
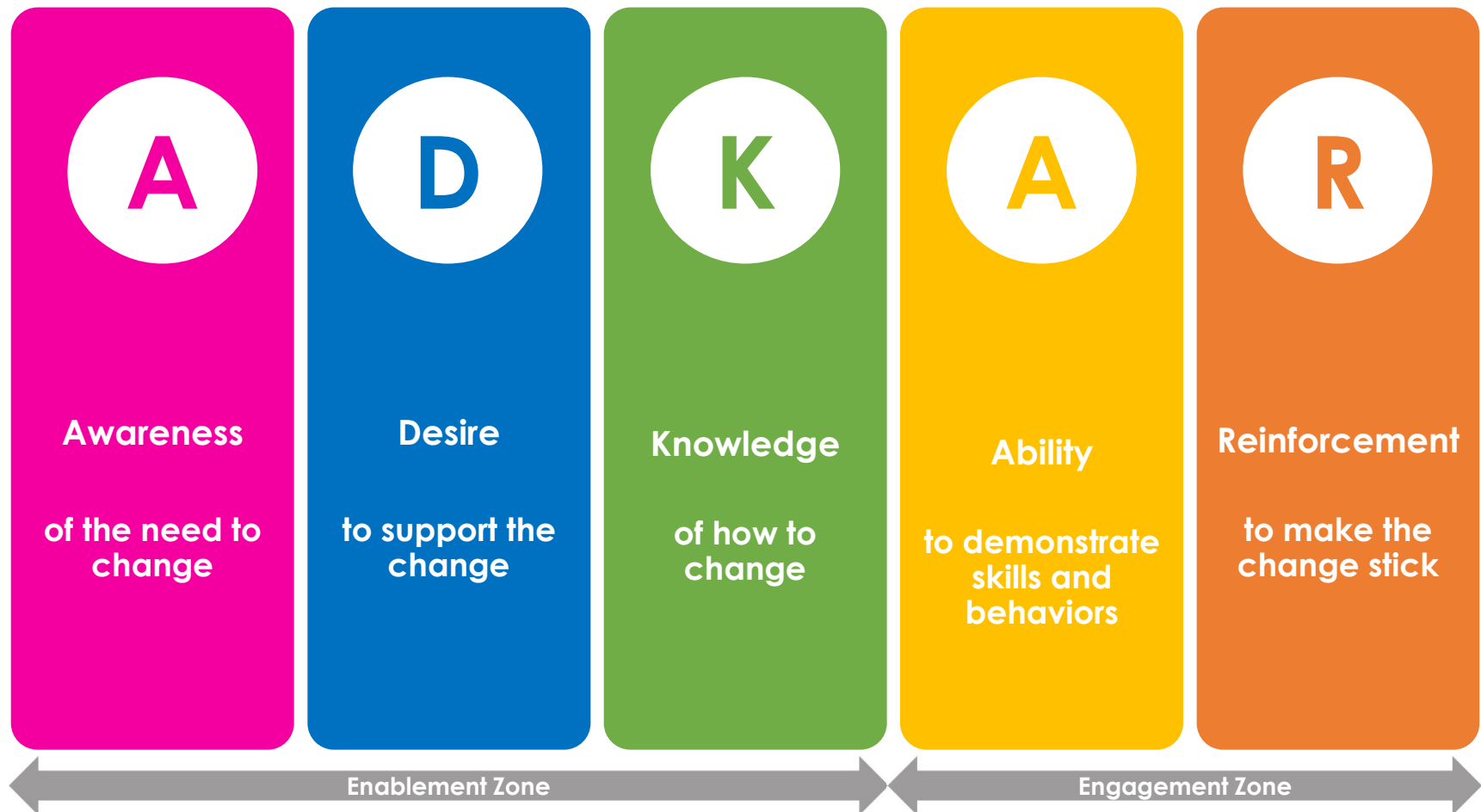
What does the project team need to be updated on?

Communication	Frequency	Goal	Owner
Project team			
Project status report	Weekly	Review project status and discuss potential issues or delays	Project manager
Team standup	Daily	Discuss what each team member did yesterday, what they'll do today, and any blockers	Project manager
Task progress updates	Daily	Share daily progress made on project tasks	Project manager
Project review	At milestones	Present project deliverables, gather feedback, and discuss next steps	Project manager
Post-mortem meeting	At end of project	Assess what worked and what did not work and discuss actionable takeaways	Project manager
Project sponsor			
Project status report	Weekly	Review project status and discuss potential issues or delays	Project manager
Project review	At milestones	Present project deliverables, gather feedback, and discuss next steps	Project manager

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Key components

|	
Audience	Who are you communicating to? Break it apart as different audiences need different messages and different communication styles
General Timing	When does it need to go out by? What needs to happen before? Frequency?
Specific Timing	Do you have specifics? Make sure you have people around to address questions, don't send on a Friday afternoon before a holiday!
Message Content	Bullet points of what you want to communicate
Delivery Mechanism	How are you going to communicate? Stand up, phone call, email, flyer, meeting, etc
Sender	Who is the message coming from?
Author	Who is providing the content and creating the message?
ADKAR	What specific barrier points are you addressing with the message?

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How ADKAR and Communication plans work together
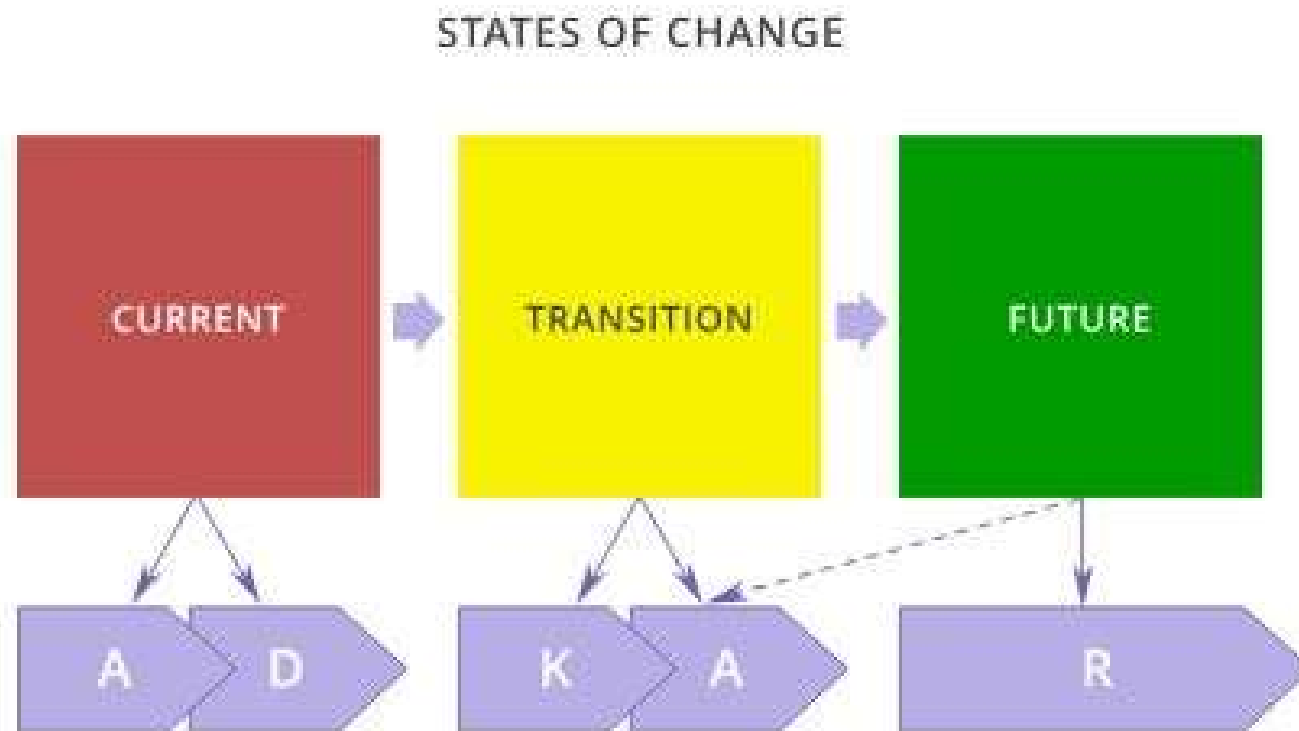
Communication plan example

A	D	K	A	R	Timing	Audience	Message Content	Delivery mechanism	Sender	Date and time
x	x				End of week 7/6	VP's and direct reports	Communicate the vision and purpose, and to provide a timeline on what is next	Email	Julie	Friday, July 10th
x	x				End of week 7/6	VP's & Direct Reports	Talking points on the email message sent by Ljulie	Talking Points	Julie	Friday, July 10th
x	x				Week of 7/13	Portland Leaders & direct reports	Continued communication stemming from Julie's 7/10 email	Face to Face	Julie & Krystal	Week of 7/13
x	x				Week of 7/20	Monica 1:1	Continued communication stemming from Leslie's 7/10 email	Face to Face	Joe	Week of 7/20
x	x				Week of 7/20	Robin 1:1	Continued comm stemming from 7/10 email			

What does everyone need to know about?
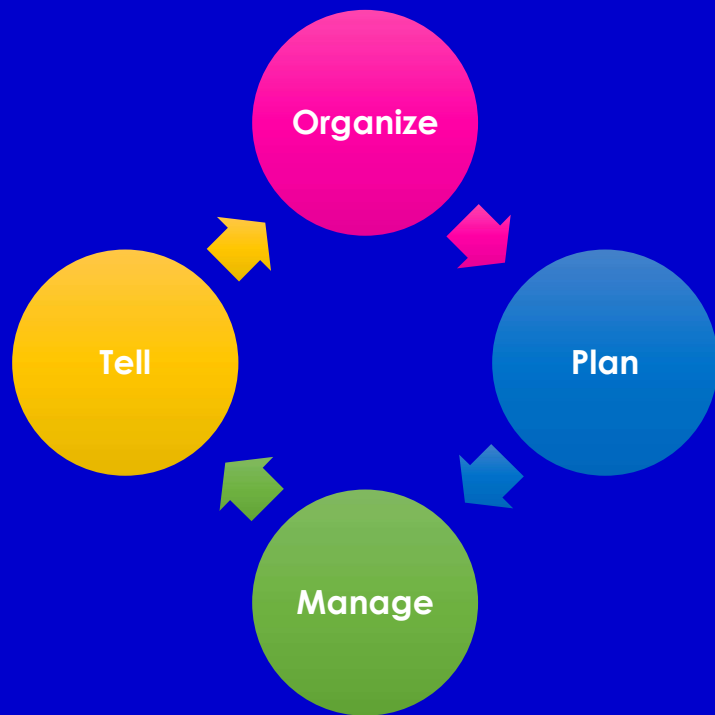
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Now how do we GET IT DONE?

Organize

Tell

Plan

Manage

How to organize the work

Creating plans to get it done

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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?

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Are you happy with the progress you are making?

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4 Part Series

Session 1
Strategic Planning: Define your vision, create your roadmap, watch for blind spots, and execute

JUNE 3

Importance of having a plan

1 year vs 3 year

Directions vs yearly goals

Session 2
Problem Solving: Using continuous improvement thinking to reduce waste, drive change and empower your team

JUNE 24

Problem | Objective Statement

Root Cause

Process Mapping Basics

7 Forms of Waste

Standard Work

Session 3
Get it Done: Learn the basics to success in execution and getting work done

JULY 15

All things planning

How to create plans

Execute plans

Lead people through plans

Risk mitigation

Session 4
People, Leadership And Change: The foundation to your success

AUGUST 15

Being a change leader

Focusing on your people

Creating development opportunities

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