



**JOINTPIVOT**

# OPERATIONAL EXCELLENCE

## PART 4: PEOPLE, LEADERSHIP AND CHANGE!

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August 5th, 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

**JUNE 24**

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

## Session 3

Get it 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 5**

you are here

# Goals And Agenda

What is  
Change  
Leadership

Being a  
Change  
Leader

Creating Plans  
for People

Capitalizing on  
Developmental  
Opportunities

# Operational Excellence

## The JOINTPIVOT Operation Excellence Components



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

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

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

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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



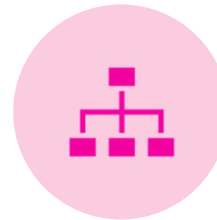
Strong **company culture** and **performance** = Long term, sustainable growth



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?**

<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

**How many are you checking off?**

# Part 1 Recap

STRATEGY	Where do you feel more comfortable?	TACTICS
<ul style="list-style-type: none"> <li>• Determines the WHAT, not the HOW</li> <li>• Intentional and focused high-level long term thinking and change</li> <li>• Sets the goals and objectives</li> <li>• Focused on defining the future</li> <li>• Typically formed by top leaders within the organization</li> <li>• Difficult to measure</li> <li>• Strategic planning does not include the execution details</li> <li>• Strategy is intangible</li> </ul>	<p>Are you actually doing tactical planning?</p>	<ul style="list-style-type: none"> <li>• Putting the strategy into short term actions</li> <li>• Is the HOW behind the WHAT</li> <li>• Involves concrete actions, steps and metrics</li> <li>• Requires day to day execution and accountability</li> <li>• Easier to pivot and change</li> <li>• Typically defined and executed by managers</li> <li>• Tactical plans include timelines and implementation strategies</li> </ul>

## 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



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

- Dictionary.com

## PLAN TO WIN

FOCUS ON THE PROCESS

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# Part 1 Recap

## 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
- Change more, plan for
- Empirical trends out with problem
- We see together
- Targets accurate and clear

### HOW

## 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 fit for your business expectations
- Remove inefficiencies
- Empower and control
- Fill in the gaps with skills and experience

### HOW

## 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 effect 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?*

# 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

Infrastructure



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

Immediate needs

Problem solving

Doing your job

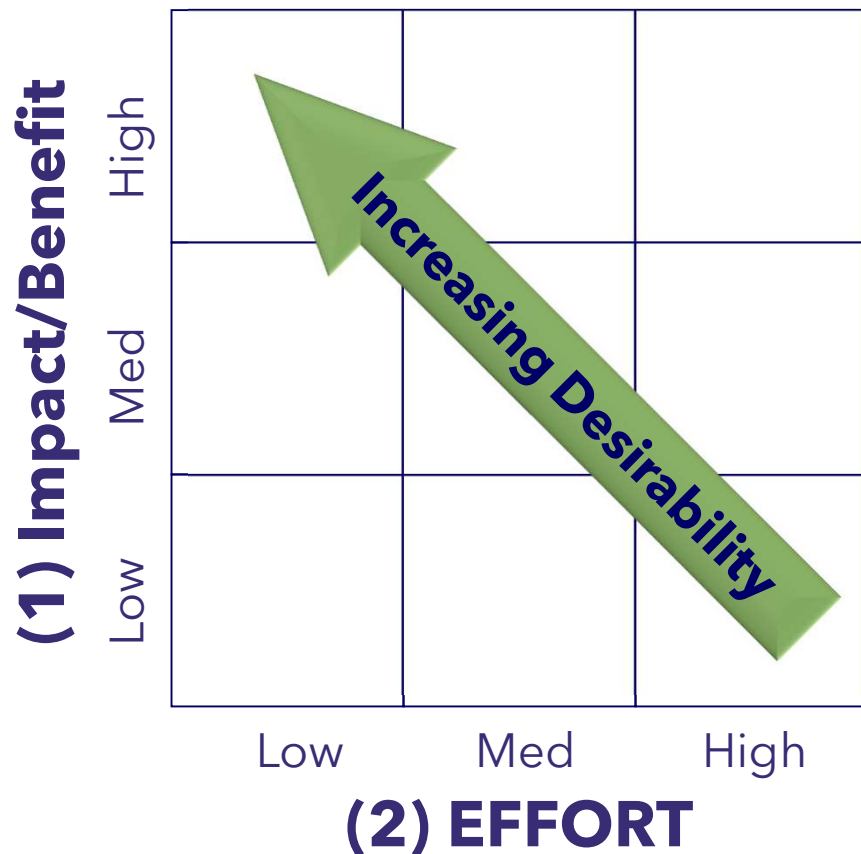
Communications

Meetings

Follow up

# Project Selection Matrix

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



**(3) Probability of Success**

- Low
- Med
- Hi

**(4) Change Saturation**

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

**Part 2  
Recap**

# Part 2 Recap

Start with what you  
are experiencing

Problem | Opportunity  
Statements



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?

# Part 2 Recap

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, .

- **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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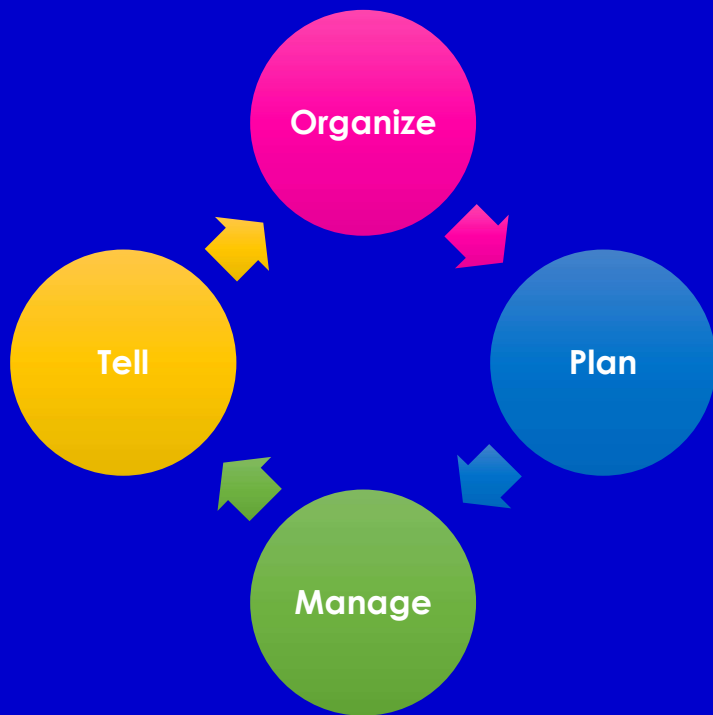
**What do you see  
happening when you  
are done?**

## Objective Statements





# Now how do we GET IT DONE?



How to organize the work



Creating plans to get it done



Anticipating and mitigating risk



Communicating the plan

## Part 3 Recap

# Plan for and mitigate risk



Part 3  
Recap

# Goals And Agenda

What is  
Change  
Leadership

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for People

Capitalizing on  
Developmental  
Opportunities

A man in a dark suit, white shirt, and striped tie stands with his arms crossed. The image is overlaid with a semi-transparent blue filter. The text is positioned on the left side of the image.

**Why is change  
leadership so  
important?**

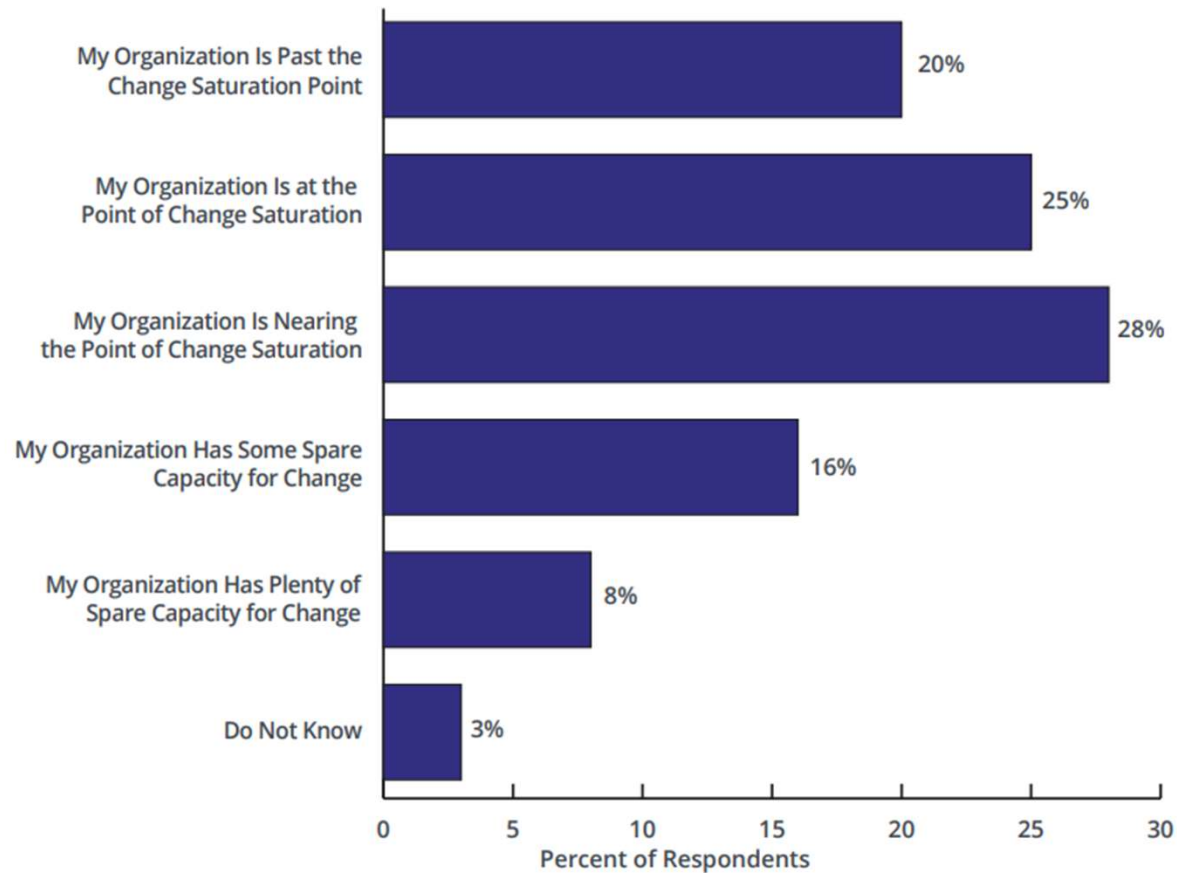
**Are people being  
left behind?**

A man in a suit is shown from the chest up, looking down with a distressed expression. He has a sign on his forehead that says "HELP!". The background consists of classical columns. The entire image has a blue tint. Overlaid on the bottom half of the image is a large white question.

HELP!

**HOW MANY  
CHANGES DO YOU  
HAVE UNDERWAY?**

# Change Saturation on the Rise



Source: Prosci Best Practices in Change Management – 11th Edition

## Stage 1: Current State

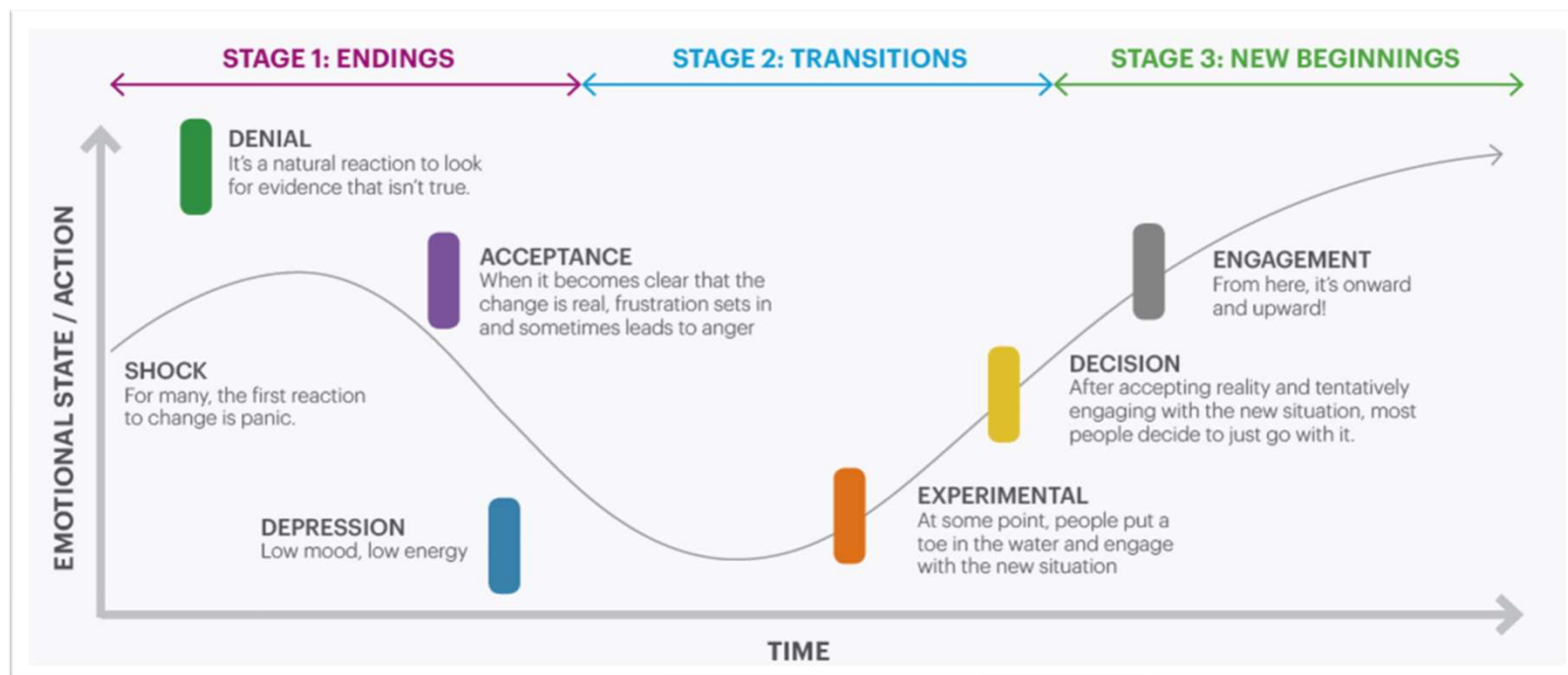
- Feeling of comfort
- In a routine
- Know what to expect

## Stage 2: Transition State

- Future is unknown
- Feelings of stress and anxiety
- Not sure what to do next

## Stage 3: Future State

- Not sure it's something we want
- Forces us into something new



# Top reasons for resisting change

## Employees

- 1. Not aware of the business need for the change**
2. Layoffs were announced or feared
- 3. Employees were afraid they lacked the skills needed**
4. Resisted in attempt to maintain personal rewards
5. Employees thought they were being required to do more with less

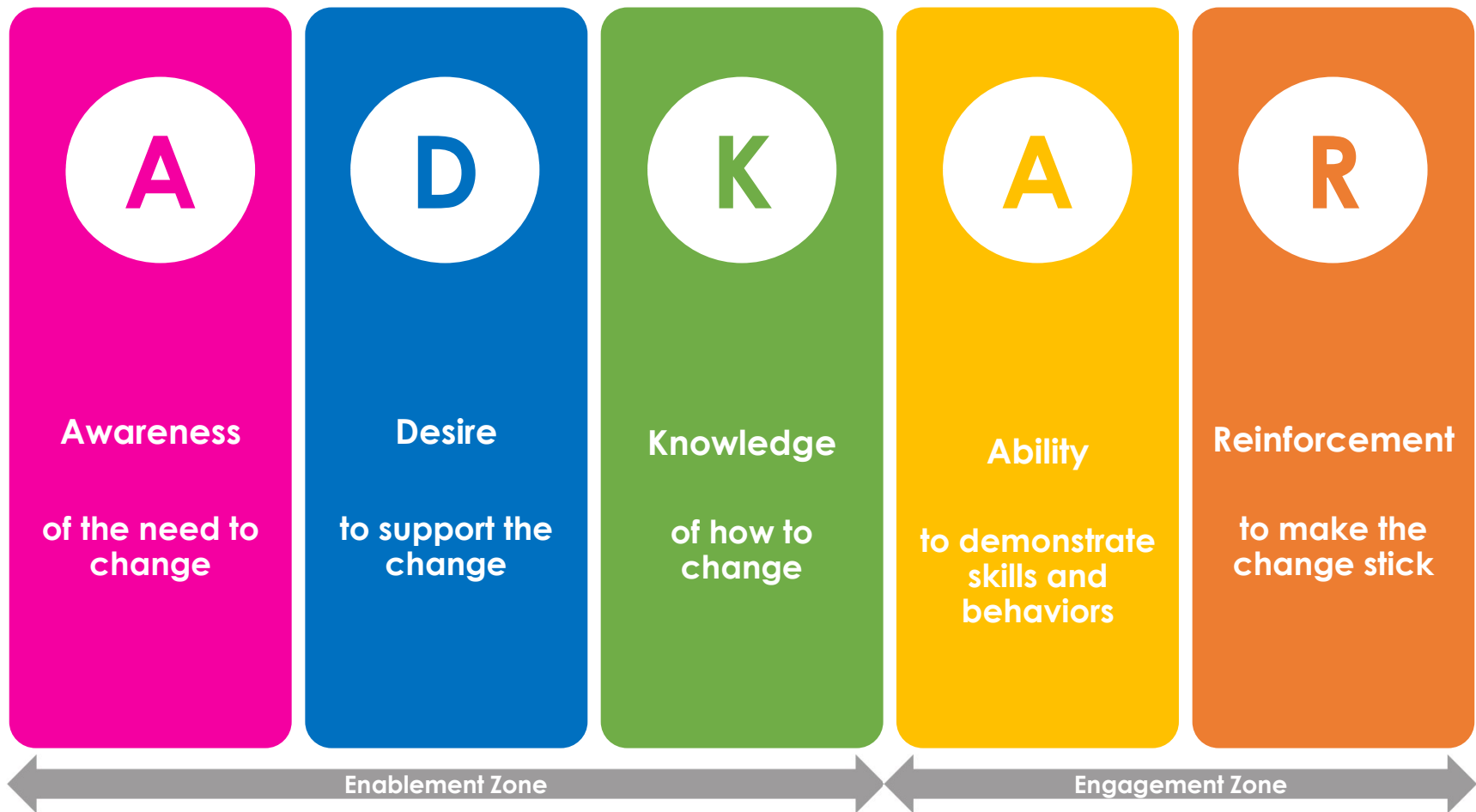
## Leaders

1. Loss of power, responsibility, or resources
2. Overburdened with current workload and responsibility
- 3. Lacked awareness for the business need to change**
- 4. Lacked the skills needed to manage the change**
5. Felt fearful or uncertain about the changes being made

Source: Prosci Best Practices in Change Management – 11th Edition



# THE ADKAR MODEL



# WHAT CHANGES?

Function	What does the change look like for this function?	Process	Systems	Job Role or Description	Reporting Structure	Skills Needed	Compensation	Work Schedule	Autonomy	Location

## Benefits

## Cost/Impact

What happens if we don't do this?

Company or function		
Individual		

**NAME**

**A**

**D**

**K**

**A**

**R**

**ACTION PLAN**

# APPLYING YOUR DATA

# LEADERSHIP CHECKLIST



## Foster Trust

- I have regular 1:1's with each of my employees.
- I have regular team meetings with the entire team.
- I gather feedback from my employees.
- I listen to my employees' concerns and issues.
- I remove or help remove roadblocks for my team.
- I share information openly across the teams.
- I find opportunities for my team to collaborate as a group.

## Engagement

- I find creative ways to offer team bonding and activities.
- I share feedback from my team with leadership.
- I share feedback from leadership with my team.
- I act as the hub that connects the team to each other.

## Generate Motivation

- I am genuinely interested in learning more about my employees.
- I privately recognize individuals on my team for their contributions.
- I publicly recognize individuals and my team for their accomplishments.
- I celebrate with my team in both formal and informal ways.
- I identify pockets of resistance and develop plans to address.

## Instill Focus

- I have clear goals and priorities for the team and individuals shared for all to view across the entire team.
- I evaluate the usage of new processes and tools in my area to ensure quality does not deteriorate.
- I identify where old processes or tools are still being used and make plans to fix.
- I identify the root causes of any non-compliance with the change among my team.
- I take action to address root causes.

## Ensure Accountability

- I communicate expectations, deliverables, and timelines.
- I adjust or monitor my team's performance measures for the impact of remote work.
- I collect performance data and share this information with the leadership team and with my team on a regular basis.
- I share specific feedback, how and why what they did was good or how to be better.

# WHAT QUESTIONS SHOULD I ASK?

## **INSTILLS TRUST**

- What issues are you running into?
- What help do you need from me or the team?
- How can I best support you?
- What information do you need to make a decision?
- What do you like about that idea?

## **COLLABORATES AND DRIVES ENGAGEMENT**

- What conversations and communications are you missing most?
- Where do we need to connect more as a team?
- What projects and initiatives would be better tackled as a team?

## **BUILDS EFFECTIVE TEAMS**

- What's working well for you in the current situation?
- What have you learned while working remotely?
- How have your priorities changed during this time?
- What are you looking forward to?
- What are you simply tolerating right now?

## **PLANS AND ALIGNS**

- What is standing in the way of achieving your goals?
- What is your measure of success?
- What do you need to be successful?
- What are your priorities, and what is the timeline?

## **ENSURE ACCOUNTABILITY**

- What progress have you made on the assignment?
- What about the process or project could be improved?
- What lessons have you learned?
- What ways can I best support you?

# CREATING DEVELOPMENT PLANS

- Where is the opportunity?
- What or where do they need to grow?
- Why would they want this?
- What opportunities will you offer?
- How will you motivate and support them?
- What worked? What didn't? Try something different?

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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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# JOINTPIVOT

Are you happy  
with the  
progress you  
are making?



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**AUGUST 5**

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