

LEAN PROGRESS

Ideas for helping your company transition to lean effective and rapidly.

LEAN LEARNING CENTER

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Conflicting Pairs

INSIDE THIS ISSUE:

Conflicting Pairs	1
Book Review of No Excuse Leadership	2
Lean Master Certificate Recipient	3
Physician Champions in Healthcare	4
Lean Tool Kit	5
Learning Learning Center Welcomes Melissa Curtis-Hendley	7

By *Andy Carlino*

We often talk about the importance of leadership on a lean journey and the distinction between a leader and a lean leader. Recently, when working with a few clients and when discussing lean implementation with potential clients, I was struck with a disturbing insight: ***Lean is often a difficult choice between what is easiest for an organization or what is right for an organization. Leadership is about making a choice. Lean Leadership is about making the right choice.***

Upon further reflection it occurred to me that these choices could be described in conflicting pairs. Some of those conflicts are embedded in chapters 2 and 4 of our book *The Hitchhiker's Guide to Lean: Lessons from the Road*. Others are not so obvious. I offer the following for you to ponder during your lean journey. Some of this might sound a little more philosophical than you are used to from us, but there is practicality in every pairing. I simply ask you to dig a little deep and ask yourself on which side of each of these pairs do you see your behavior. Remember, leadership is not a position, it is a role and responsibility

•**Training versus Learning**—Training is often just simply the transfer of information. Learning requires application, repetition and evaluation. Every training “program” needs to include elements of application and validation of the effectiveness. Also, remember the tremendous power there is in repetition. You can never repeat a message or an application too often

•**Stress versus Tension**—Stress is generally the result of a feeling of helplessness wrapped in a cloud of uncertainty. Tension is recognizing the gap between a desired state and the current and realizing the potential to narrow the gap. Stress is obviously not a good thing simply because of the wear and tear it puts on an organization and often isn't intentionally imposed upon an organization. Interestingly enough, tension will relieve the stress.

•**Support versus Engaged**—Webster defines support as “to aid the cause by approving, favoring or advocating.” Webster defines engaged as “to involve oneself or become occupied—participation.” I don't think I have to elaborate beyond this contrast.

•**Demand versus Direct**—It is obviously easy to make a demand of anyone. It often doesn't require a vision or a plan and frequently doesn't even require knowledge. Direction, however, is providing the beacon or guiding light for an individual or an organization while illuminating the pathway toward that beacon. Direction can't occur without a vision and certainly not without knowledge. I've thought a lot about this pair and how often in my career, as a senior executive, I took the easy choice.

•**Preach versus Teach**—Preaching can certainly be emotional and inspirational but preaching doesn't guarantee nor often is it a reflection of practice. I'm sure you remember that old adage. To teach you must first learn, and if you have truly learned, your thinking and behaviors (practices) will change. People often will follow a preacher but they will always copy a teacher.



Andy Carlino is Co-Founder and Partner of the Lean Learning Center



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•**Walk versus Observe**—This pairing is one of my pet peeves. Management by Walking Around (MBWA) was a popular yet highly ineffective management concept of the 80's and early 90's. It wasn't that it was a bad concept. It was just poorly executed. MBWA without the skills to surface waste, observe activities, connections and flows, and identify abnormalities is simply "industrial tourism." It's just a walk. Maybe it's good exercise and it does provide some visibility of the individual to the organization, but not much else. Observing requires skills. Walking only requires movement.

•**Quick Results versus Slow and Sustained**—This is really not a conflicting pair but instead is often not a

complementary pair. Every organization wants quick results, as they should, but there should also be a parallel path in the lean implementation that assures incremental and sustained results. There is no need to sacrifice one for the other.

•**Transfer versus Empower**—We often subrogate or transfer responsibility and accountability to others without first providing them the skills and knowledge to succeed. We somehow expect they will pick it up along the way. Some do but most don't. Whether they do or don't, it is still going to be costly to the organization. Empowerment requires enlightenment and education first before requiring responsibility and accountability. An often repeated example is

when we promote our "super-worker" to a "supervisor", often getting a bad supervisor while losing a super-worker. As many of you consider a small Work Group environment in an attempt to emulate Toyota, don't forget the skills development that will be required.

•**Tools versus Culture**—If you haven't heard our views on this important pairing, it's not because we haven't been saying it. Lean is not born from what you see; lean is born from how we think

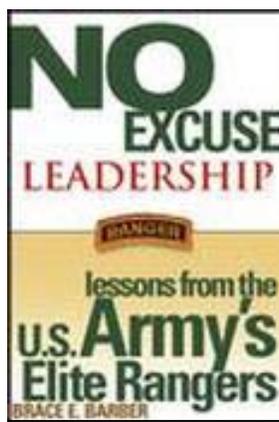
I'm sure there are other conflicting pairs and I would like to encourage you to send us your pair(s) so we can share these insights and experiences in future issues of the Lean Progress.

Great Non-Lean Books

No Excuse Leadership by *Brace E. Barber*



Author Brace E. Barber



No Excuse Leadership is a book that leverages the direct experience of the author as a U.S. Army Ranger and the experience of other Rangers. This book is one filled with stories, directly from the mouths of ten Rangers, who tell of their experience of

being tested beyond their known limits. Most of the stories hail directly from Ranger School, an experience designed to stretch the mind, body and spirit beyond its breaking point for Rangers to learn what they are capable of and to learn that other struggles can't be that bad. Each chapter in the book focuses on one Ranger and one leadership principle. The principles drawn out through these stories are that Rangers are Persistent, Humble, Focused, Driven, Instinctual, Honest, Selfless, Confident, Dutiful and Determined. Of course, these leadership principles as a list are not that revealing or fresh. To say that a leader must be Honest or Driven is not a breakthrough concept. What makes this book powerful is the way in which these leadership principles are brought to life. By telling these stories in the first person, you put yourself side by

side with the Ranger as they paint a picture in vivid detail – you can feel the cold of the water, the strain to stay awake, or the desperation for a moments rest. The reader is placed in the desert or swamp with the Ranger to gain a sense of just how severe and how challenged these Rangers were to rise to the top. Each Ranger's stories carry many lessons on leadership, including the title of the book of no excuses, although each of the 10 principles are focused on a single Ranger. The author, Ranger Barber, not only includes a chapter on his own experience, which is the most extensive chapter drawing the Ranger lessons outside of the military into civilian experiences, but Barber also provides an introduction and summary of each Ranger's chapter drawing upon the key lessons. Barber focuses on these two key lessons: "seek responsibility

and take it for your actions and know yourself and seek self-improvement.”

How does it contribute to the lean knowledge base?:

Being a lean change agent doesn't quite bring the same risks as in the military, but a lean change agent might be the Rangers of the operations world. There is tremendous pressure and it requires the types of leadership skills discussed in No Excuses Leadership. The lean change agent has to be Persistent, as they are trying to make a big change over a

long period of time. The lean change agent has to be Humble, because they will only win the hearts and minds of others if they get the credit and not the change agent. The lean change agent has to be Focused, because otherwise they will get sucked back in to the very firefighting they are trying to change. The lean change agent has to be Driven, because they will have to push through barrier after barrier. The lean change agent has to be Instinctual, because they will have to make organizational bets that might not

pay off for many months. All of the leadership principles that Barber discusses in this book apply to the lean change agent, and while the environment and consequences are different, a lean transformation is a war, but a war for the hearts and minds of the employees and leaders of the organization.



Joe Wheat Awarded Lean Master Certificate

Leading recycling company RSR Corporation has announced that employee Joe Wheat has been awarded a Lean Master Certificate from the Lean Learning Center in Novi, Mich. Appointed as the RSR Journey to Excellence (JTE) Manager in 2003, this certificate qualifies Mr. Wheat as an effective and capable lean leader and facilitator. To achieve this status, he had to participate in the Lean Experience, Lean Leadership, Lean Kaizen Boot Camp, and Lean Value Stream classes at the Lean Learning Center with an individual project assigned to each. Additionally, Wheat had to successfully implement a number of real-world on-site programs at the RSR facility.

Through its JTE program, which has been guided by the Lean Learning Center, RSR Corporation is successfully implementing lean manufacturing across

its corporation -- the Indianapolis facility had documented \$220,000 in savings within the first five months of 2005. Mr. Wheat has played a key role in this enterprise-wide transformation including his Lean Final Demonstration Project, which analyzed the Refinery Hard Lead Loading procedures of the facility. The project team was able to identify potential savings of \$876,272 annually through process changes that would reduce both shipping and hard lead material costs.

“Lean has brought RSR together with a common purpose to eliminate waste and continually improve processes,” commented Mr. Wheat. “The biggest lesson that I have learned in my training is that most companies fail in their lean transformation because they confuse the tools and practices of lean with the system.

Lean has to be adopted as a way of thinking and acting.”

“Lean transformation is not just about tools,” said Jamie Flinchbaugh of the Lean Learning Center. “It starts with a change in the way everyone thinks about what they do, how they do it and why it matters. “Joe grasped this concept early on and has been able to help RSR use this systematic approach to eliminate waste and sustain results.”

Prior to his appointment as the JTE Manager, Wheat served as Plant Environmental Manager. He is also a Six Sigma Black Belt. Wheat earned a bachelor of science from Marion College and an MBA from Wesleyan University. An Indianapolis native, Wheat currently lives in Avon, Indiana with his wife Brenda. They have two grown children and three grandchildren living nearby.



JOE WHEAT RECEIVES LEAN MASTER CERTIFICATE FROM ANDY CARLINO

THE LEAN LEARNING CENTER OFFERS A COMPREHENSIVE LEAN MASTER CERTIFICATION PROGRAM. TO LEARN MORE, VISIT WWW.LEANLEARNINGCENTER.COM



Creating Lean Champions: A new approach from the Pittsburgh Regional Healthcare Initiative

Strong, knowledgeable internal change leaders are critical for a lean transformation. Establishing such leaders remains a challenge for many organizations. The Pittsburgh Regional Healthcare Initiative offers a unique approach to tackling this challenge. This article is taken with permission from the January 2006 PRHI Executive Summary.

Physician Champions: a new approach to “spread”

As the health care industry has come under increasing regulatory pressure to report and reduce medical errors, PRHI has found that excellence isn't as readily driven from outside as it is from within, by talented, passionate clinicians who challenge their teams and their institutions to deliver the best possible results. However, although passionate about quality, physicians often know more about what they to want to achieve than about how to achieve it. Moreover, their efforts to reform traditional healthcare practices often come up against barriers to change in the status quo.

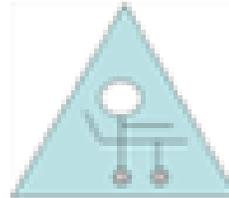
Those who effect major change may find little uptake of their ideas among colleagues and others. The issue of the “spread” of improvements is a major topic among healthcare improvement experts.

Announcing the Physician Champions Program

To encourage continued, significant improvements in healthcare quality in Southwestern Pennsylvania, and

to spread those changes more broadly, PRHI, in partnership with the Allegheny County Medical Society and the Pennsylvania Medical Society, inaugurated the Physician Champions program.

The program initially includes eight physicians practicing in six different settings. The eight emerged through a rigorous selection process that drew more than 30 physicians interested in applying PRHI's Perfecting Patient Care (PPC) principles to greatly improve safety or practice through evidenced-based research projects.



The Jewish Healthcare Foundation provided \$25,000 grants for each project, in recognition of the nationally acclaimed successes achieved over the past few years by a small cadre of physicians who, with PRHI support, have applied PPC principles to their work with stunning success. Using these principles, significant, measurable clinical improvements have been made in infection control, pathology accuracy and cardiac surgery outcomes. Work also continues in stemming the complications of diabetes. In some instances, dramatic

financial savings have been documented.

The Physician Champion Program is intended to help the entire healthcare community amplify these successes. Clinicians receiving the first round of Physician Champion grants are:

- Dr. Eileen Boyle, East Liberty Family Health Care Center; Dr. Harsha Rao, Veterans Administration Hospital—aspects of diabetic care.
- Dr. Jerome Granato and Dr. Fred Harchelroad, Allegheny General Hospital—infection control.
- Dr. Michael Culig, Western Pennsylvania Hospital—cardiac care.
- Dr. Dennis English, Magee-Womens Hospital—improved accuracy of pap smears.
- Dr. Adele Towers and Dr. Eric Rodriguez, Benedum Geriatric Center—geriatric post-operative discharge planning.

What and How

The physicians have offered a clear idea of the improvements they have in mind—the “what.” (See sidebar). With support from PRHI, they will learn new ways to create improvement, adapted from industry—the “how.”

For more than a decade, businesses ranging from airlines to auto makers have been employing engineering principles—including the Toyota Pro-

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duction System techniques that are at the heart of PPC—to improve safety or competitive standing. The healthcare industry has been virtually alone in ignoring the value of these disciplines.

However, a recent call to action from the National Academy of Engineering and the Institute of Medicine is triggering wider discussion and adoption of the engineering approach to improving healthcare. The NAE/IOM’s recent report, Building a Better Delivery System, made numerous references to PRHI partnerships to illustrate the value of engineering disciplines in healthcare.

As it kicks off the Physi-

cian Champions program, PRHI not only will supply its partners with PPC curriculum and coaching, but also with support for other key aspects of their projects, whose outcomes ultimately will undergo both clinical and financial analysis. With physicians partnering with PRHI in this way, improvements are expected to spread more quickly and easily across the healthcare community.

In the coming months, the PRHI Executive Summary will profile each physician and project, in an effort to share knowledge of both their difficulties and their progress.

“As a business owner and consumer, concerned both about healthcare quality and increasingly burdensome costs, I believe this work is

vital to the region,” said Alan Guttman, chief executive of the Guttman Group and newly appointed chairman of PRHI. “I applaud the dedication of the physician champions and look ahead eagerly to see what they will accomplish.”

The Pittsburgh Regional Healthcare Initiative is a coalition of regional leaders committed to perfecting healthcare for every person in Southwest Pennsylvania. The PRHI is one of the leaders in applying lean principles to improve healthcare delivery.



Lean Tool Kit: Cascade Teaching

Applying the right lean tool at for a given problem follows directly from mastery of the lean principles.

Cascade Teaching

Proper Uses of Tool:

1. To provide standardized education of lean, either broadly or topic-focused, to the entire organization
2. To provide top-down connection through the organization establishing leadership expectations and practices

Improper Uses of Tool

1. Cascade teaching as something good for every level below the primary leader but fails to include the leader
2. Cascade teaching without proper change management preparations will likely create

skepticism and cynicism in the organization

Description of Tool – How-to

Cascade teaching is a method to drive knowledge into the organization. It is done in order to provide specific knowledge throughout the organization in a standardized way. Two elements must be standardized – both the content, or message, and the process, or design.

Let’s take an example to understand the process.

The CEO may begin teaching something like a lean overview, a concept like continuous flow, or a tool such as error proofing. The CEO

would teach the Vice Presidents at the company.

The Vice Presidents, having taken the class from their boss, now prepares to teach their direct reports, perhaps the Plant Managers. The Plant Manager then prepares and teaches their staffs. The staff members then prepare and teach their reports. This continues through to the front-line employees so that everyone has been provided the same teaching and messages.

There are two primary benefits to this approach. First, when the teaching is received from the boss, the student is likely to take it much more seriously than if it is taught by some corporate staff.

**CASCADE
TEACHING IS A
GREAT TOOL TO PUT
LEADERS IN THE
ROLE OF BEING
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Cascade Teaching *Continued*

Second, if the executive or manager must teach it they must prepare to teach, and this helps extend the learning process much further than if they were just a student. These two benefits are very significant and powerful in spreading a message and creating alignment within the organization.

There are some barriers to success. One, it is hard to maintain a standard message when each leader is responsible for teaching. This barrier can be combated, although not eliminated, by preparing extensive teacher's notes for the managers. Two, managers are not trained to be effective instructors. This barrier can be mitigated by coupling each instructor with a trained instructor who can help them with the process, coach them on teaching, and take over any extremely facilitation-heavy activities. Third, it is hard to schedule. Instead of open classes that people can attend as their schedule works, you are asking a manager and his entire staff to be at the same place at the same time for an extended time. The only solution to this is the strong emphasis on the importance and then making it happen. Fourth, the executive's or manager's behavior may not be consistent with what is being taught, leading to cynicism. This is a barrier

regardless of who is doing the teaching, but is somewhat reduced through the cascade teaching approach.

It is best to have an extended plan for cascade teaching; don't just do one module then ask "what's next?" Because of the significant work that you must do to remove barriers, it is best to leverage this over an extended series of cascade teaching. Have a plan for this. What will be taught first, second, third? What frequency will new classes be distributed? How will we link one course to the next? If cascade teaching is done for more than a year, executives will eventually choose this process to send any important message to the organization.

The teaching that will be done of course must be designed. The approach to this will depend on the organization and the capabilities of the senior executive leading the effort. It may be designed by the executive herself, or by a central support staff or even by an outside organization. The designer of the materials must then prepare the first teacher to do the teaching. They may also be involved in preparing other levels of managers to do the same teaching, depending on need and availability.

Variations on the Tool

The practice can start at any level depending on what level the teaching needs are identified. For example, if a plant manager decides to transform safety practices in the plant, a cascade teaching program may begin at that level and be driven down throughout the organization.

How Tool Relates to Rules and Principles

Cascade teaching applies the principle of **Create a Learning Organization** by strongly valuing learning. It turns the leaders into teachers, and in order to be teachers they must also be learners. The exchange between boss and subordinate, or mentor/mentee, begins to build a learning culture.

Cascade teaching also **Establishes High Agreement of Both What and How**. Through teaching, the company's approach to a practice or tool is taught in a standardized way, providing a consistent application among students.

Lean Rule #3: Specify and simplify every flow path is applied as the teaching flows throughout the organization following its designed hierarchy.



Melissa Curtis-Hendley Joins Lean Learning Center

The Lean Learning Center has announced the appointment of Melissa Curtis-Hendley to lead its new Instructional Design Studio. In this position Curtis-Hendley will be responsible for development of the Center's instructional materials for its standard curriculum offerings as well as expanding its customized lean education programs capability.

"Every company has a unique environment in which it must operate, so there is no 'one size fits all solution,'" said Lean Learning Center partner Jamie Flinchbaugh. "Melissa will

play a crucial role in helping us develop our customized training and development programs including instructor-led courses, self-study materials, and simulation exercises."

Curtis-Hendley brings vast experience to the Center, having consulted on and designed numerous training initiatives for a variety of manufacturing and non-profit organizations throughout Michigan. She holds a Bachelor of Arts degree as well as a Master of Training and Development degree from Oakland University. Her Master's project focused on explor-

ing the organizational conditions necessary to successfully implement lean manufacturing processes.

"I have long been interested in what it takes to help transform organizations into lean enterprises," said Curtis-Hendley. "Having the opportunity to develop instructional materials dedicated to this endeavor is very exciting for me."

In addition to her formal degrees, Curtis-Hendley is certified in human resources by the Human Resource Certification Institute and is a lecturer on instructional design and human resource technologies at Oakland University. She lives in Clarkston, Michigan.



COMING MAY 1-5

LEAN KAIZEN BOOT CAMP

A powerful tool for generating the results you need learned through a real kaizen experience

Agenda

Day 1: The Kaizen Process

Begin by understanding the what, why and how of the kaizen process. Through presentation, video and exercises you will understand how a kaizen works. This is essential knowledge to any kaizen facilitator. Even if you already have a kaizen program, you will learn unique and powerful tools to take your program to new heights.

Days 2, 3 & 4: On-Site Workshop

We will take you to a local manufacturing company and perform a real workshop. Along with our experienced facilitators, you will gain experience in co-facilitating a real kaizen. A real team and real process will be part of this learning – no simulation here! As a learning kaizen, we will take the time to explore the leadership, facilitation, process and implementation throughout the process.

Day 5: Facilitation, Leadership and Action

The last day will begin with a reflection on the challenges and successes of the past three days. You will also learn more about workshop facilitation, leadership, and planning and follow-up of the kaizen process. You will explore the kaizen facilitator as a salesperson of change and finish the day with an action plan to begin, along with all the materials you need to get started.

**THE LEAN
LEARNING CENTER
WELCOMES
MELISSA CURTIS-
HENDLEY WHO WILL
LEAD THE
DEVELOPMENT OF
CUSTOMIZED LEAN
TRAINING
PROGRAMS FOR
OUR CLIENTS**



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**For more visit
www.leanlearningcenter.com**

The Lean Learning Center was founded in 2001 by manufacturing and consulting industry veterans Andy Carlino, Jamie Flinchbaugh and Dennis Pawley to address the gaps and barriers that are holding back companies from successful lean transformation. In addition to the advanced curriculum, the Center has developed a learning environment designed specifically for adult learning, utilizing techniques that include discovery simulations, case studies, personal planning and journaling. Together, with affiliate Achievement Dynamics, founded by Andy Carlino in 1991, the companies offer a complete array of lean transformation services.

Lean Learning Center Announcements

The Lean Experience

Lean Experience (5 Day Program)

Begins:

April 3, 2006
 May 15, 2006
 July 31, 2006
 September 18, 2006
 October 30, 2006
 December 11, 2006

Lean Six Sigma Leadership

Lean Six Sigma Leadership (2 Day Program)

Begins:

May 8, 2006

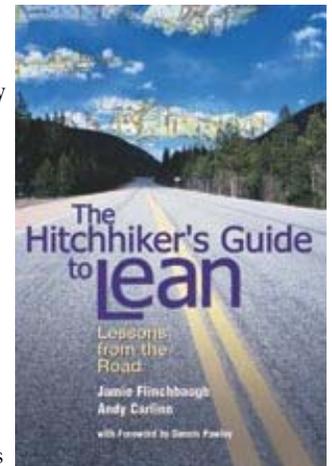
Lean Kaizen Workshop Bootcamp

Lean Kaizen Workshop Bootcamp (5 Day Program)

Begins:

May 1, 2006

“Wisdom transcends data, information and knowledge. Jamie Flinchbaugh and Andy Carlino truly are wise men. They show us how data, information and knowledge about management processes interact to direct lasting and meaningful change. Readers of this book will be able to rescue “lean”, one of the most important management concepts in decades, from the dustbin in which TQM, reengineering and other flavors of the month now reside. But process change must start and stop at the top so this book is as important for CEOs as it is for operating managers. The book is easy to read but every page requires the reader to pause and reflect. I have been tilling in the authors’ fields for more than forty years but I studied their book twice, not as a chore but as a feast. I will send a copy to every CEO I know.”



– John O. Whitney, Professor Emeritus and former Chairman of the W. Edwards Deming Center for Quality Management at the Columbia Business School

For more information visit:
www.HitchhikersGuideToLean.com