

Learning the Ropes: Lean Leadership Training

Becoming a resource within an organization to teach, guide, and mentor others.

Elizabeth Merrill

Be more ‘guide’ than ‘sage on stage.’” This is just one of many gems of sound advice given at the recent AME Lean Facilitator Workshop in Portland, OR. The workshop, led by Scott Simmons of Climax Portable Machine Tools, Inc. and Julie Hatten, Northwest High Performance Enterprise Consortium (NWHPEC), both AME West Region board members, was a two-day event. The first was spent in the classroom and the second touring a Welch Allyn facility to see firsthand some of the lean leadership principles in action.

On the first day Scott and Julie kept the group energized through many exercises that got us up and out of our seats. This kept the day moving along at a good pace. Participant Christina Radcliffe, a lean engineer for Everpure Inc. of Hanover Park, IL, said she liked the “ice-breaker (exercise) to avoid the why-am-I-here (attitude).” In this exercise, attendees got up and met as many people as possible while introducing themselves and what

they bring to their company. People started talking right away. Instead of just a job title, they were asked to talk about the energy they bring to work, which made people speak passionately about their job.

The next exercise — one of many during the workshop designed to help us learn how to lead an event — was to tell people what you do best away from work. Again the room came alive with conversation. Christina said that these kinds of exercises “make people from the floor at ease and get a group working as a team.”

How Lean Leaders Facilitate Change

Understanding the role of a lean leader was the first of five workshop objectives. Scott explained that “change management presents special requirements. Lean leaders have roles and tools different from managers.” The point being that facilitating change, lean leaders must influence others by sharing or selling the benefits. This is opposed to a manager who will ask or direct their team to do the work. Most often the lean leader has no direct reports and

In Brief

Lean leadership presents special challenges. To facilitate change, lean leaders influence others by selling or sharing the benefits. Unlike managers who direct or ask their team to do the work, lean leaders ask for resources and participation from others. Participants in a recent workshop learned concepts and strategies for engaging and leading others in effective change processes.

must ask for resources from others. To receive that support, the lean leader will need to define the benefits to the manager and their team.

There's more to becoming effective lean leaders. They should be well-versed on the topic or process being targeted, have an awareness of their own communication style, and use that style to influence (not direct). They should have a vision of where the organization is going and be supportive of others to get there. Lean leaders should be seen as a resource within an organization to teach, guide, and mentor others. Julie said that the intention of the class was for participants to understand the uniqueness of the lean leader position and to give them needed support and structure to ensure they are successful.

Leadership Tools

The second objective of the class was to identify and practice new leadership tools. Each person was given an opportunity to present an idea or lead an activity during the class, allowing the facilitators to determine if participants understood the material. Then participants gave each other feedback on their performances; Scott and Julie also gave them good observations and tips.

Scott offered to come up to the front of the class with the participant if they were uncomfortable. He worked to "create a safe environment to learn" and asked them to keep this approach in mind when leading events. He also encouraged people to take advantage of opportunities to practice leading a group during the class and in future group activities. His advice was to volunteer to lead discussions, facilitate brainstorming activities, and take an active role in classes, meetings, and group activities.

Julie added, "How often do we

really practice on how we handle the water cooler moments — those side discussions when people question the reasoning for change? Practicing equips lean leaders to handle those situations. As we get everyone to share lean leadership vision and purpose it provides an understanding of the value of practicing. They are learning the tools to speak to different levels within the company."

Next, we broke into teams, and each team selected a lean principle. Then the teams brainstormed related objections and benefits that might be encountered in each level of an organization as lean concepts are being introduced. CEOs will want to know about the money, for example. What are the financial implications, costs, and benefits? They'll want to know "why" we are diverting resources to the project. Middle management will be concerned about the process: What support and systems are required? They'll want to know "who" is going to be responsible. Operators are task-oriented and will want to know how to do it. When a lean leader can effectively explain the WIIFM (what's in it for me) for each of these groups, they create buy-in and support for improvement efforts.

Identify and Overcome Roadblocks

Which leads us to the third course objective: Identify and overcome roadblocks to lean leadership. Innovative ideas lead to those inevitable conversations of, "Why are we doing this?" We practiced different organizational roles, learning the language of a leader and how to deal with conflict and those resistant to change.

Roadblocks can include our own style and agenda that can get in the way, we learned. As lean

leaders, we need to avoid pressing on with our own solution and allow others the opportunity to develop theirs. Effective leaders are capable of pulling ideas out of participants.

Another roadblock is that most people have a natural tendency to resist change. Change forces people to break patterns and make adjustments, and that makes people uncomfortable. Working around and through the existing culture of an organization can also be a roadblock.

Daryl R. Conner, in his book *Managing at the Speed of Change* (Villard Books, New York, 1993) speaks about inappropriate pace, which can kill an improvement. "Accuracy of the decisions alone can never compensate for poor implementation. Organizations, like individuals, have a speed of change at which they operate best. Our lives are the most effective and efficient when we are moving at a speed that allows us to appropriately assimilate the changes we face," he noted. An effective lean leader will be ready for these types of roadblocks and prepare to acquire the resources to overcome them.

Phases of Lean Event Development

Our fourth course objective was to identify the four phases of lean event development.

- *Phase I: Evaluate the focus area/subject.* What opportunities exist? Are there flow, process, equipment, setup, or workplace organization improvements that would benefit the area? Also, what is the readiness of those involved to improve? Are the employees ready for rapid change, do they need more training, or does the culture need to be addressed?

- *Phase II: Planning.* In this (the most involved) phase, management and leaders develop a charter with objectives, timelines, deliverables, and boundaries that communicates to the team clear expectations. Background and current state information is also included in the charter. In addition to assisting with the charter development, management provides resources and removes roadblocks. It is the responsibility of the lean leader to meet with management and have everyone's roles and responsibilities defined and documented before the event. The next step in planning is to select a team. They should be selected from area experts, leaders, influential skeptics (to keep the team challenged), technical experts, managers, supervisors, or stakeholders impacted by the workshop. A detailed agenda that includes timelines for each activity and section of training is also essential. Finally, the lean leader will take care of logistics: scheduling the team and the room, and purchasing supplies.
- *Phase III: The event itself.* When Scott and Julie arrived at the hotel before the class, they found that there was no screen in the room. That was quickly taken care of and would have been a much larger problem if they had not given themselves time to set up. Scott pointed out that a good facilitator needs to arrive early and assess the room. The facilitators also suggested Learn-Do cycles in which you teach a principle then apply it to the focus area. We experienced this during the workshop; there was an activity to demonstrate each concept introduced in the class. Scott also emphasized that if you are

going to introduce a new concept to the team, study it well yourself. Another point is that there are different learning styles. Some people learn best by reading, others by listening, some by writing or verbalizing what they have heard, and still others by hands-on exercises. When conveying an idea, address these different styles to assure that all in the room "get it." The activity for this section was to pair up with someone and verbally instruct them on how to build something out of Legos, without letting them see the process. This was a very interesting activity which showed if you were a "verbal" learner paired with a "verbal" instructor, it went well. If one of the participants had another style, then the exercise was much more difficult.

- *Phase IV: Follow-up.* "Follow-up is the single most important thing to do to maintain gains made during the event," Scott said. Leaders and managers need to check and make adjustments daily after an event designed to create change. The lean leader needs to assure there is follow-up with the appropriate individuals and team members, and that there are action item reviews with assigned champions. The team should see the effect of the change by measuring success against the baseline. When doing so they should ask: 1) Did you get what you expected? 2) What did you learn? And 3) How can you apply this in other areas of your organization?

Strategies: Brainstorming, Encouraging Participation

Learning and practicing facilitation strategies was the fifth workshop objective. These were woven throughout the class. As mentioned previously, there were many activities, which included a simple one-piece-flow versus batch flow demonstration. We participated in brainstorming sessions, with Julie and Scott reviewing good brainstorming rules:

- No idea is too wild
- Go for quantity, not quality
- No criticism or evaluation
- Piggy-backing on ideas is encouraged
- Laughter is essential
- No non-participants.

Good facilitators constantly encourage participation. If someone is not contributing, they are not only getting less out of the class, but they are also withholding from others by not sharing. Another tool is to understand the role of a scribe (document what is being said). Many times people in this role want to paraphrase or edit. A good scribe will ask to make sure they are capturing the person's idea correctly.

During an event the facilitator should check in on a regular basis to review progress and charter, assure team members understand the goal and where to go for support, assist teams with problem identification, and help the team to follow the process.

Report-outs are an important part of any event. If the event is more than one day, there should be a daily report-out to management to assure the team is on the right track. The final report-out will include the entire PDCA (Plan-Do-Check-Act) cycle: The plan, who is going to do the action items, the measures that will let the team know if they have been successful,

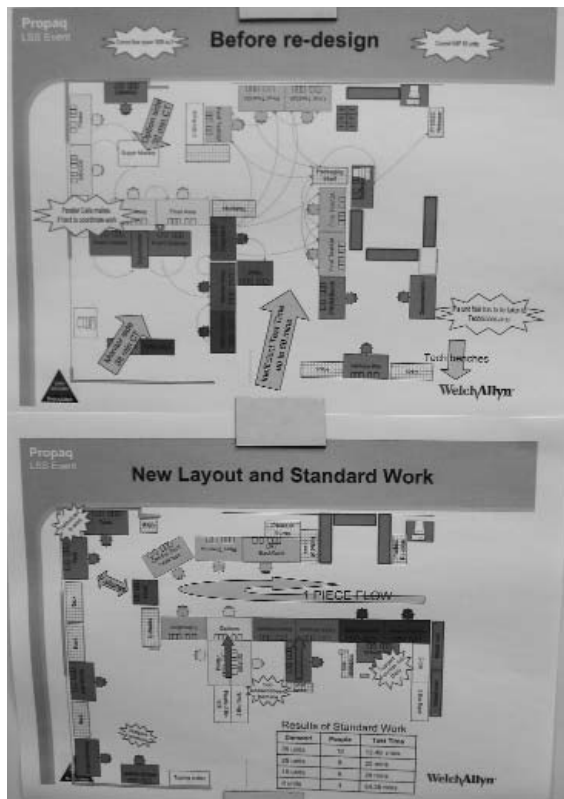
Another useful strategy is to adjust to the class as it happens. During the workshop, Julie and Scott found that a film clip that was part of the class would not play. It was a scene from the movie *Apollo 13*, when the ground crew had to come up with a filtration device for the landing module to keep the astronauts alive until they could get them back to earth. Scott used this as a learning opportunity and just explained the issue and what the clip was about; giving the class three lessons in one: the power of brainstorming and ingenuity, don't let a mistake or mishap throw you when leading an event, and adjust the event around the problem.

Lessons Learned at Welch Allyn

On the second day of the workshop, we traveled by bus to Welch Allyn, a privately-held medical monitoring device manufacturer. Tom Doherty, operations manager and Sheila Cuyler, lean specialist, gave us an overview of their many lean activities and a tour of the manufacturing floor, which included a stop at their morning meeting. This is a standup meeting held in front of a large board which displayed information on the current state of the company. (Figures 1 and 2 show work area displays offering project/process updates.) All areas of the company were rep-

resented at the meeting, and a quick review of the day's game plan was discussed. It was impressive to see that everyone knew what the issues of the day were and their role in rectifying them.

Sheila said that when they started on their lean journey they had more long-term projects that she facilitated. She noted that their consultants Oregon Manufacturing Extension Partnership (OMEP) trained and did most of the facilitating as this work began. Now they are focusing on kaizen events and completing the projects in a short timeframe. They are working towards a culture of daily improvements that are done automatically. Sheila is also working to build up



facilitation skills of other employees. Her plan is to ask participants to lead future events (with her help). This should be a twofold gain: It takes some of the facilitation load off of Sheila and it creates an ownership for the employees. Sheila said, "Facilitating is teaching: basic training before an event, leading during an event, and supporting and fine-tuning after the event."

The Welch Allyn pre-event preparation starts with selecting a team that includes representation from key stakeholders, upstream and downstream processes, quality, and manufacturing engineering. Then the team creates an event charter to define the purpose, scope, and measurable goals. They also gather baseline metrics. During the event the team deter-

mines the variations for peak, average, and low demand. The facilitator trains the team in lean principles if necessary and leads the team in doing time studies and waste observations. The team then gets to work making needed improvements. Follow-up starts with documentation and training. The team meets weekly to review progress against goals, and the facilitator provides regular support to assist in transition and help manage the change. Using this formula, Welch Allyn has had several successes resulting in reduced WIP, labor, and space requirements.

The workshop and tour were filled with good ideas, advice, and tools to help lean leaders understand their role and facilitate an event successfully. As Julie counseled, "It is important that facilitators are

equipped with the tools and knowledge to be successful. Otherwise your organization is missing a huge opportunity. Why do kaizen if it is not going to work?"

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