

Trane takes Lean beyond the Factory







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Agenda:

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- ✓ Company overview and start of our journey
- ✓ Business leader tools:
 - ✓ Leader Standard Work

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- ✓ Goal Deployment in practice
- ✓ Key Learnings & Close √ Q&A

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Trane: Our Mission

Our Path to Premier Performance









Our Journey by the Numbers

Measure	2014	2019
Basic Lean Training	41	1138
Problem Solving Training	25	333
Advance Lean Ldr Training	n/a	6
OpEx Support	1	23
Districts under transformation	1	22
Product Segment which used Lean Tools to grow	12M	85M





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Leading on the Edge: The journey from Factory to Sales was not an easy feat

- \checkmark Same resistance to change, different audience
- \checkmark Prove results with small experiments earn the right to grown and expand!
 - ✓ One Resource
 - ✓ One Team / Area
 - \checkmark One Geography or District
- \checkmark Apply lean principles in new creative ways concepts and tools DO transfer.
- \checkmark Don't forget to document and the power of story telling!
- ✓ Don't wait for perfect, try SOMETHING NOW!





My Lean Leader Journey: Running a Business Segment with Leader Standard Work

Eric Simon

Energy Services & Controls Leader, Trane Tennessee/Mississippi District









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What is Leader Standard Work?

A structure and **routine** for defining what to do, when to do it and capture if it was completed, all with the goal of driving business results and developing people.

A list of **standard activities** that a leader performs on a daily basis to run and improve the business for the benefit of our customers and employees.



Includes: ✓ what to do ✓ when to do it ✓ how long it should take to do it ✓ how often to do it, and... ✓ did I do it?



		Expected Outco	me: Devel	op O	pEx	cap	abili	ities thro	ough deployment of the OpEx Strategy. Guid
		Transformation	efforts so V	SA &	OE	DP E	Box 8	B = Box 3	3. Be a leader and steward of OpEx BOS
We	ek:	standardized pro	ocesses. Fo	cus a	80%	of n	ny ti	me on p	eople development activities and coaching.
		(<u>F</u>	lan, Do, Che	ck, Ac	t)				
			DAILY						
	Work Element	Timing	Duration	м		w		F	Actions, Observations, Questions
D 1	1st Shift MDI Walk	11:00 AM	0.75 hours						
D 2	2nd Shift MDI Walk	4:30 PM	0.25 hours						
D 3	Genuine praise / recognition of at least 1 individual	EOB	0.25 hours						
D 4	Clear email inbox / tasks	EOB	0.5 hours						
D 5	Review tomorrow's meetings / adjust plan	EOB	0.25 hours						
		1	WEEKLY	-					
	Work Element	Timing	Duration	-	Т	W	Т	F	Actions, Observations, Questions
	Weekly Mission Control Review	Monday @ 10 am	1.0 hours		ļ	ļ	ļ	ļ	
W 5	Materials MDI	Wed. @ 2:15 pm	1.25 hours	-				ļ	
W 6	Standard Work POD Meeting / Actions	Thursday @ 7 am	1.0 hours		ļ	ļ			
W 7	OpEx Team Meeting w/Griselda	Thursday @ noon	1.0 hours	ļ	ļ	ļ			
W 8	Robert's Staff Meeting & EOW Discussion	Friday @ 8:30 am	1.5 hours						
W 9	Follow-up/Coaching with BPS Students	Friday @ 2 pm	2.0 hours						
			MONTHL						
	Work Element	Timing	Duration	1	W2	W3	W4	/W5	Actions, Observations, Questions
	Update Calendars (OpEx - BOS / Team - SharePoint)	EOB Day 1	0.5 hours		ļ				
M 2	Review RIE Productivity Inputs in Windchill	By noon on Day 2	0.5 hours		ļ				
M 10	Update VS Box 8 RCA Survey	10th day of mo.	0.25 hours			ļ	ļ		
M 11	Update Mission Control	Wed @ noon	1.0 hour	_		ļ			
M 12	Monthly Mission Control Steering Team Review	Thursday @ 1 pm	1.5 hours			ļ			
M 13	SP Fluids Steering Team Meeting	Fri. 1st & 3rd wk.	1.0 hours		ļ		ļ		
M 14	Support Monthly RIEs	Mon Fri.	40.0 hours		ļ				
	Power Tools Newsletter Submission to Shannon Bennet	Wed. @ noon	1.0 hour						
M 15	Facilitate Monthly Training	Tue. & Wed.	12.0 hours					ב	
M 16	Update OpEx Lists on Share Point	25th day of mo.	0.25 hours					ב	
M 17	POD Exec update	25th day of mo.	0.5 hours					ב	
					I				
			QUARTER	LY					
	Work Element	Timing	Duratio	n		Q2			Actions, Observations, Questions
	OEDP Refresh								
Q 1									



Leader Standard Work: Example





Getting Started

What you will need:

- A sheet of paper
- A pen or pencil

Instructions:

- Fold paper in half
- Fold paper in half again
- Write the Day & Date and 1 & 2



Create a daily log of tasks:

- For each day write down 2 tasks you need to accomplish that day
- Check off each task as it is completed
- Do this for 4-8 weeks





Create Your Initial Draft of LSW



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Lessons Learned: What has worked?

- Have and use a coach
- Print it out and fill it out by hand
- Carry it with you
- Share with peers
- Keep a copy of past LSW
- Use to balance workload
- Help to identify waste





Lessons Learned: What were the Challenges?

- Overcommitting in initial drafts
- Keeping it going sustaining the use of the tool
- Updating as responsibilities change
- Addressing schedule irregularities week of training, travel days, etc.
- Standard Work activities did not consistently align with business goals





Lessons Learned: Next Steps

- Align LSW with Goal Deployment Process to include what is important
 - Does it drive business results?
 - Does it improve customer value?
 - Does it help develop people?
- Have leaders post their LSW as part of our Visual Management
- Create Standard Work documents for each activity included in LSW
- Use LSW to define and train for success in each role





Parting Advice on Leader Standard Work

- **Commit** to getting started
- **Carry** it with you
- Share it with others
- Update it frequently





My Lean Leader Journey: Running a Business using Goal Deployment Tools

Eric Rodgers

Service Solutions Leader, Trane Chicago District

















	Transformation Calendar												
Month	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	
JDI – Just Do It	DONE	DONE	DONC	BONE.	DOM	DONE				0			
Strategy A3			DONE:		DONE	MARK SATT		EDEC 23 D					
Project A3	DONE		BONE	DONE	DONE DONE				Hard Control of Contro		10.1		
RIE													

Using the X Matrix tool enables stronger goal deployment





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	Transformation Calendar												
Month	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	
JDI – Just Do It	DONE	DOM	DOINE	DONE DONE	DOINE	DONE -			DONE DONE				
Strategy A3					DONE								
Project A3	DONE		DONE		DONE								
RIE													





Systems Sales MWI



Light Commercial MDI → MWI

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Leading on the Edge: Lean is a Journey not a Destination

We have more opportunity to use lean tools to improve our business. It will not be easy. Here are some highlights:

- Sustaining and driving forward in all of our locations using Business Operating System (BOS) Deployment Plan Strategies
- >Empowering all employees to step up as peer leaders and lead with these tools
- ➤Creating lean career paths and lean learning paths for our sales employees
- Hiring Operational Excellence resources into territory and other leadership teams
- >Ensuring we promote and hire leaders who demonstrate strong lean leadership





Thank You!

Your opinion is important to us!

Please take a moment to complete the survey using the conference mobile app.

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