

23RD ANNUAL



23RD LCI CONGRESS
OCTOBER 19-22

Rapid Improvement Series

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LEARN BY DOING FROM THOSE WHO DO

October 20, 2021

Health precautions to keep everyone as safe as possible at Congress:

- Wear masks at all times in indoor events.
- Complete your daily health screening on your phone and bring it with you when you enter the center each day.
- Practice social distancing to the extent possible. Seating at plenary sessions is being structured to help with this.
- If you feel ill at any time, please leave the conference and return to your room/consult a physician as necessary.
- Ultimately, our collective health and safety at Congress is up to all of us. Thanks for your support!



Introductions



Presentation Agenda

- **Background**
- **Means & Methods**
- **Lessons from Our Experience**
- **General Application**



Background



Problem Statement

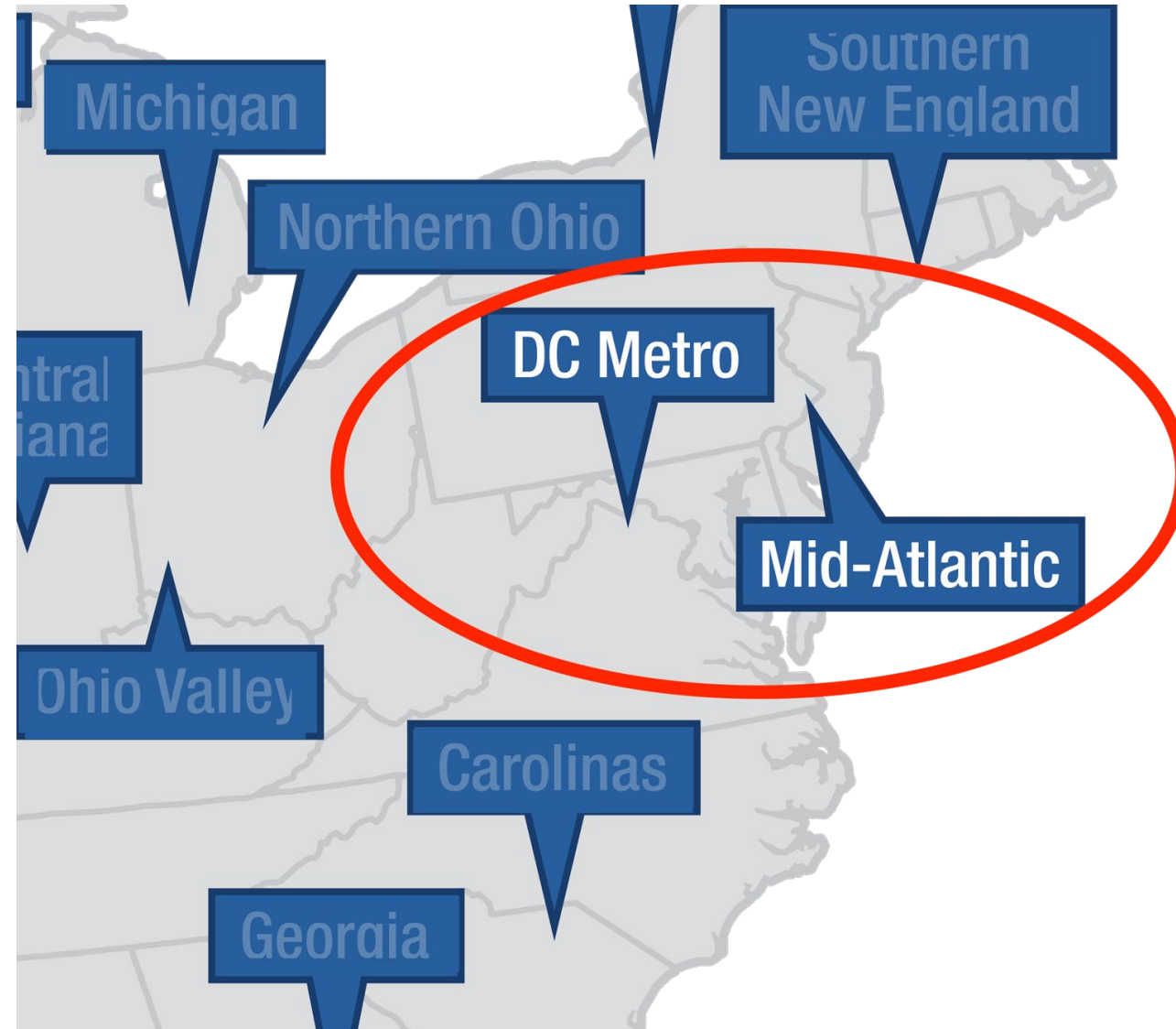
Yes, Covid...

But also, how to create an experiential, collaborative learning environment to drive deeper engagement in Community of Practices.



Collaborating Communities of Practice

- Regional Approach
- Shared Organization
- Project Proximity



Necessity is the mother of invention

- Brainstorming for new engagement
- Lockdown Limitations
- Continued Engagement beyond the core team
- Experimental, collaborative learning



History – Graphic Timeline

- 2020 Event Brainstorming session
- Covid Caused last in person CoP event
- 1st Series
- 2nd Series
- Congress



Means & Methods



Planning & Setup

- (Virtual) Big Room & Work Cluster Environment
- COP Engagement – Core Team Facilitators
- Organization & Tools
 - Leveraging tool improvement
 - File sharing space
- Templates (A3, Pull)



Series Agenda

- Agenda adjusted for second series
- Initial Kickoff Meeting
- Breakout Sessions
- Final Project Presentation

AGENDA



Kick - Off Event

9:00	Lean Learning Series Intro & A3 Overview. Meeting Structure
9.15	Topics Generation, Voting, Selection
9.45	Cluster Formation, Breakout: Intro & Ice Breaker, Problem Statement & Background
	Cluster Member Introductions Questions: - Business Card Details - What you 'really' do at work - Somewhere you really want to visit - New Skill/Hobby During Lockdown
10.45	Wrapup & Plus Delta

Series Agenda

9:00	Cluster Lead Presentation: A3 Progress. 4 Min Per Cluster
9:20	Work Cluster Working Session: - Session 2 - Current / Target Condition, Analysis (Test Plan) - Session 3 - Problem Analysis/Root Cause (Test Plan) - Session 4 - Proposal & Implementation
10.45	Wrapup & Plus Delta

Final Session

9:00	Cluster A3 Final Presentations: 15 Min Per Cluster
9:45	Event Retrospective / Keep/Stop/Start - 15 Min

Topics Development – Lean Coffee Format

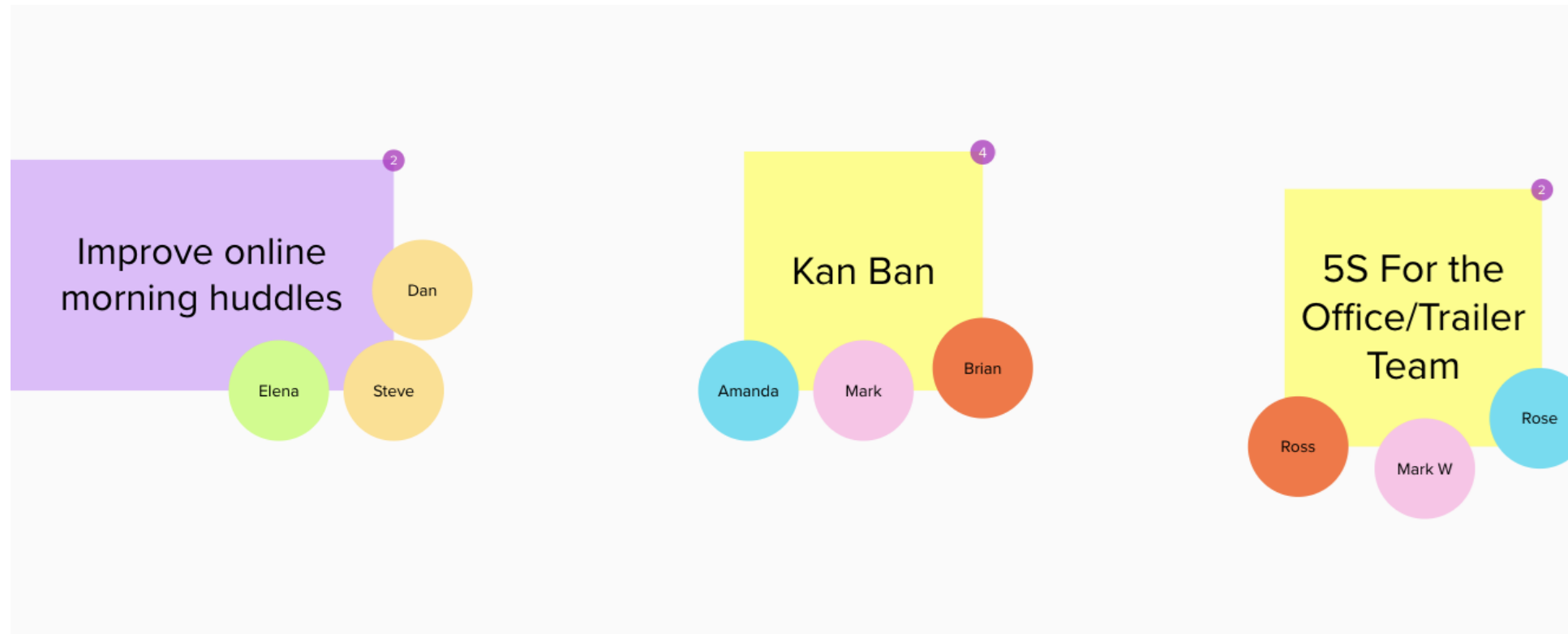
- Populate potential topics with group
- Vote on topics to choose
- Assign groups to topics
- Topics Workability
- Tech evolution from
- Whiteboard to mural voting

Topics



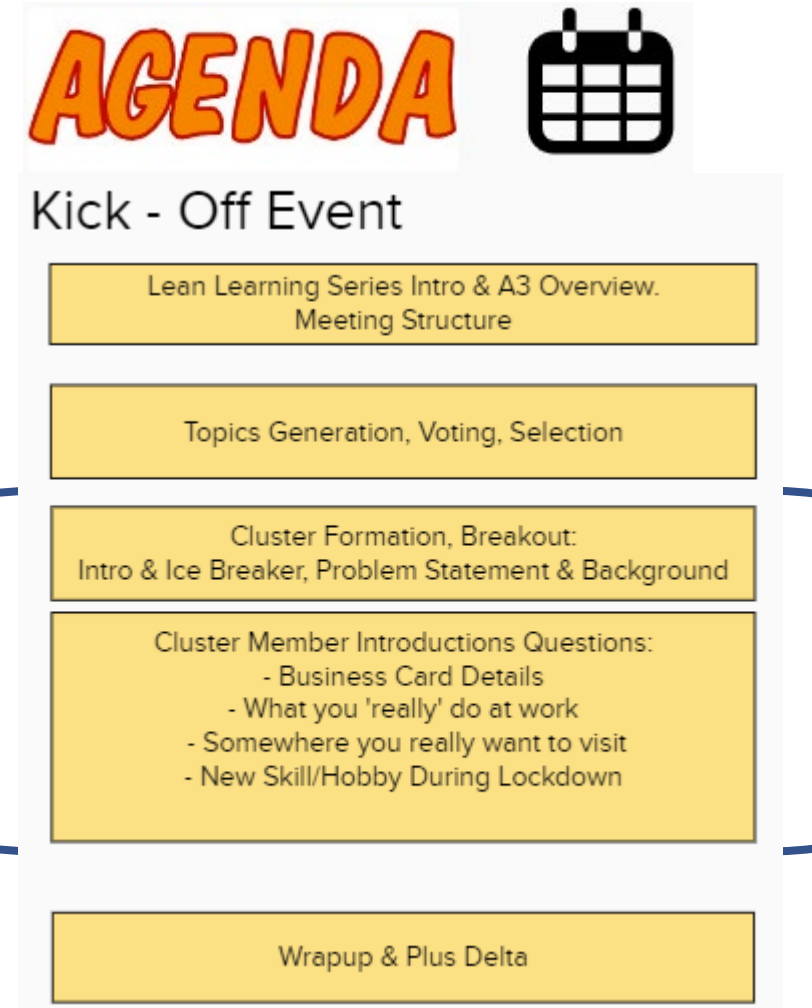
Future Enhancement – Voting with Feet

- Leverage online platform to allow cluster formation organically



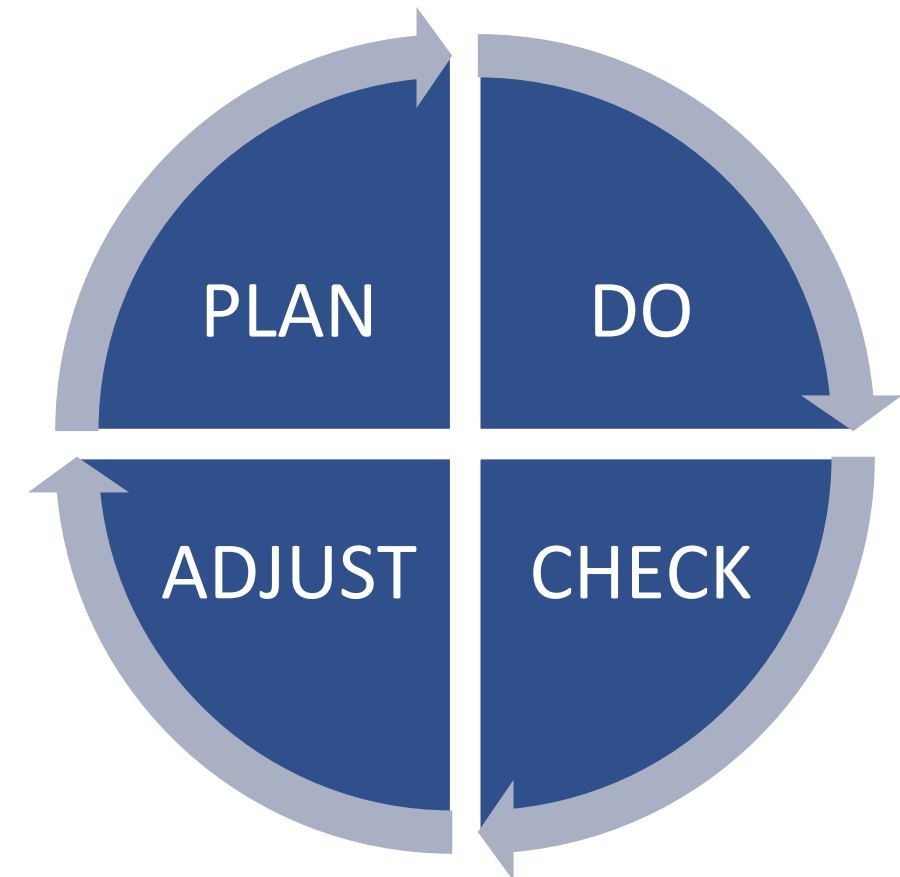
Cluster Organization

- Guide rails for effective clusters:
 - Aim for groups of 3-5
 - Understand participant roles – doers, observers, and coaches
 - Realistic topic scope
 - Select a group leader



Work Cluster Meetings

- Topic focused check ins between series meetings
- Initially discuss tool/practice and current state
- Cluster members practice implementation
- Follow up cluster meeting to discuss results
- Rinse & Repeat



Work Cluster Meetings – Leverage A3

- Use A3's to structure meetings
- A3's on a shared Mural board
- Increased collaboration within and across cluster groups

Series Agenda

9:00

Cluster Lead Presentation: A3 Progress.
4 Min Per Cluster

9:20

Work Cluster Working Session:

- Session 2 - Current / Target Condition, Analysis (Test Plan)
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10.45

Wrapup & Plus Delta

A3 Development

Problem Statement

Part 1 - Our industry struggles balancing work personally and across teams. Kanban can offer a solution. How do we implement Kanban effectively across a team?

What are measurable indicators of success: How your team feels about what was completed in the week- heTracking number of items in right side of kanban

Note what's reoccurring in own lane?

Limiting Work being done

Don't have tasks get missed - clear who's doing what and when

Multi person kanban board

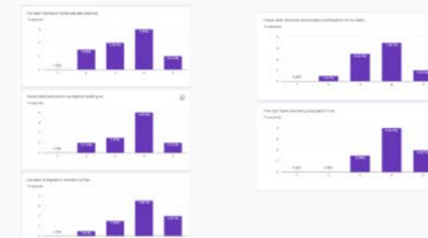
How to handle items that don't get done, or are staying on the board too long

Visual task prioritization across teams

We currently struggle balancing work personally and sharing the workload across teams

Background

Kanban info?



Current Condition

I have clear direction and proper prioritization of my tasks. *

Strongly Disagree ○ ○ ○ ○ ○ Strongly Agree

The right tasks are being assigned to me. *

Strongly Disagree ○ ○ ○ ○ ○ Strongly Agree

Our team members' workloads are balanced. *

Strongly Disagree ○ ○ ○ ○ ○ Strongly Agree

I know what everyone in our team is working on. *

Strongly Disagree ○ ○ ○ ○ ○ Strongly Agree

Our team is aligned on overall priorities. *

Strongly Disagree ○ ○ ○ ○ ○ Strongly Agree

Team Survey Results

Struggling to balance internal work w/ external request

Work/Task are spread across (3) different platforms

Priorities and task leaders not being defined early enough in the process

Team/individual confusion on assignments and management of work load

Difficulty establishing priorities or re-directing to others with available capacity

Some team members struggle with what to work on, knowing others are involved in some manner

Our team is struggling to manage workload effectively. There are the same items on our to-do list week after week. Certain team members are overloaded with work in a given week, while others are much less busy. There is a lack of clarity of what is the team's priority on any given day. In order to quantify this we sent out a survey to get quantifiable input on how our teams feel about how the work is going.

Analysis

Priorities and task leaders not being defined early enough in the process

Pre-determined swim lanes are not clearly defined which could improve overall task assignment

Monthly or quarterly review of long term task not happening

Adoption of a completely digital means of tracking was new and may have happened too quickly

Overall Team Priorities are not being discussed enough as a group

Re-prioritization of tasks doesn't occur frequently enough

When we meet as a team, discussions are around solving problems instead of what is assigned to people

Our agencies are too broad and we don't really use a tool to go through to do list. They are not as visual as needed team items that need to be done that aren't assigned

Communication - lack of insight/clarity on team priorities or who is involved in certain tasks

Teams inability to capture future "To Do" items - leads to limiting the distribution of work

Questions on definition or effectiveness of moving tasks from "In Progress" to "Complete"

Adoption issues - some people not working from or updating the board - leading to wasting my time on status

Struggling to manage team workload. Why? Lack of clarity of what each of us needs to be doing day to day. Why? We understand the big picture objectives, but not weekly or shorter. Why? Currently not forcing the team to examine what the team is looking to accomplish on a weekly basis, only driven by what individuals are aiming to complete. Why? Individuals are high performers, so this is "good enough", but would be improved by optimizing the team's ability to complete priorities.

Target Condition

Maintain a consistent balance of both long and short term task

Planned review of Work In Progress

Use and review board on Mondays and Fridays

Allow time after updates for - big picture look - workload balance

Sizing tasks to meet capacity

Getting things across the finish line (For real)

Consistent source of team priorities, workload, and back log

Dedicate more meeting time to removing roadblocks

Right sizing task to move from inception to completion in several days, not weeks

Increase team member engagement/rate of adoption such to increase value of information

Improve our team's ability to do the right work at the right time. This will be measured by an increase in the team survey score. The goal is for the team to be completing the correct priorities week to week, without any one person feeling overworked or underutilized. A key success indicator will be any given team member knowing the critical work that needs to be completed by the team and individuals at a given time.

Proposals

Use a survey to evaluate the team and see where they feel the issue lie

Utilize a Kanban board as a visual indicator of what the team needs to complete, and which team members will be responsible for each task. The kanban board will force the team to limit the number of items any one person can do in a given week, and will therefore force the team to prioritize. Reviewing the status of the kanban board as a team at least twice a week will keep the team on the same page in terms of team priorities and progress. Including all team members in the creating of the Kanban board will allow it to reflect the team's priorities rather than any one person.

Implementation

WIP Limits per person Harder with <100% resources

Parking Lot Bucket

Reserve agenda time look at big picture work loading

Biggest take-away was that people didn't believe the workloads were balanced

Need to follow up with additional surveys over a set time

Task sizing methods?

Iterative Information Discovery

- Use Measurable Data
- Surveys of teams are great!

I have clear direction and proper prioritization of my tasks. *

1

2

3

4

5

Strongly Disagree

☐

☐

☐

☐

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Strongly Agree

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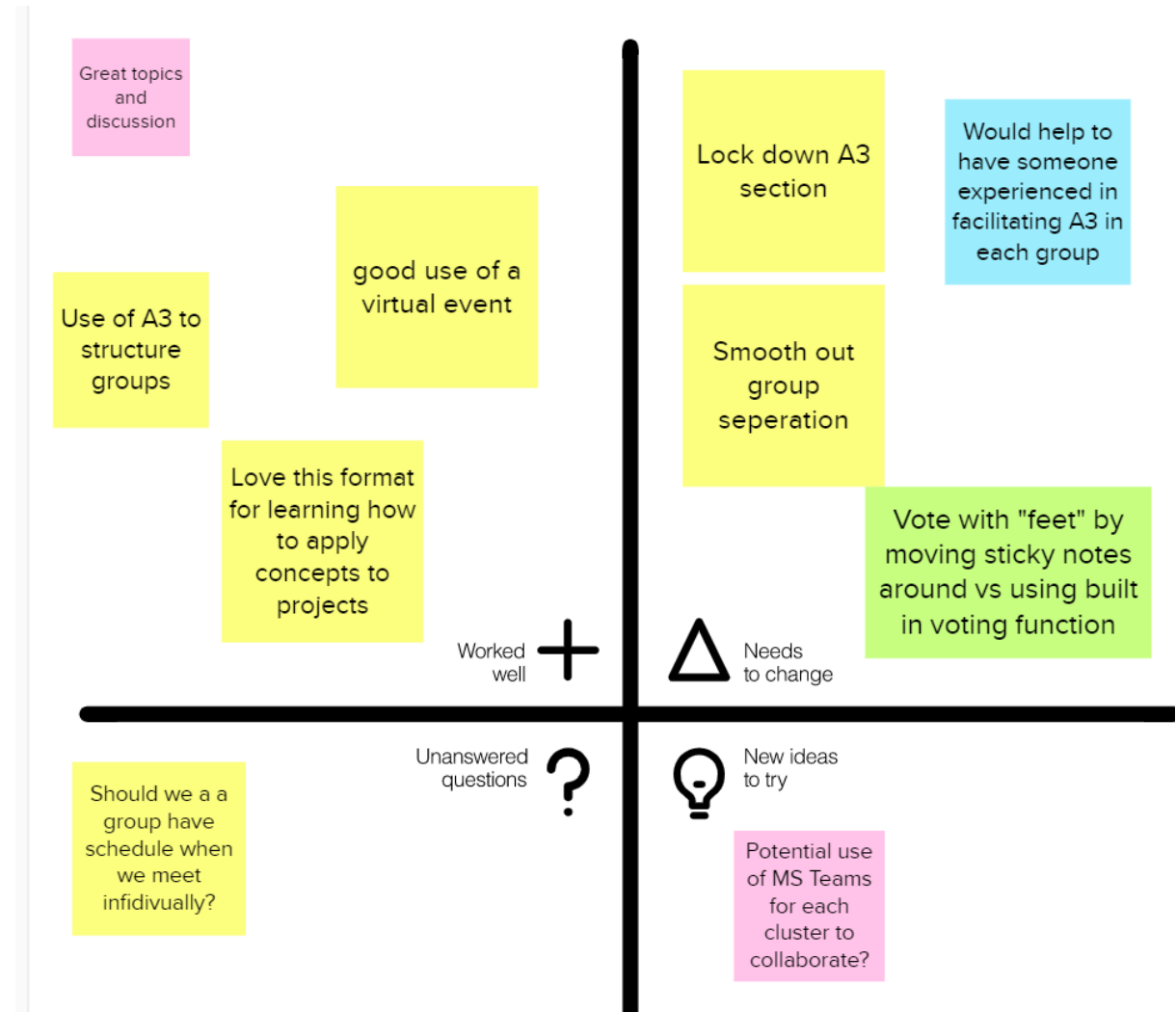
Strongly Agree



Final Meeting

- Presented Findings of A3's
- Lessons Learned of A3 Group
- Plus/Delta for Series
- Lean tools participants learned and/or applied throughout these sessions:

- | | |
|---------------------|--|
| ⚙️ Big Room Mindset | ⚙️ Pull |
| ⚙️ A3 Process | ⚙️ Lessons Learned of A3 Group |
| ⚙️ Kanban | ⚙️ Visual Management |
| ⚙️ Huddles | ⚙️ Continuous Reflection & Improvement |
| | ⚙️ Shared Leadership/Facilitation |



It's Not Perfect



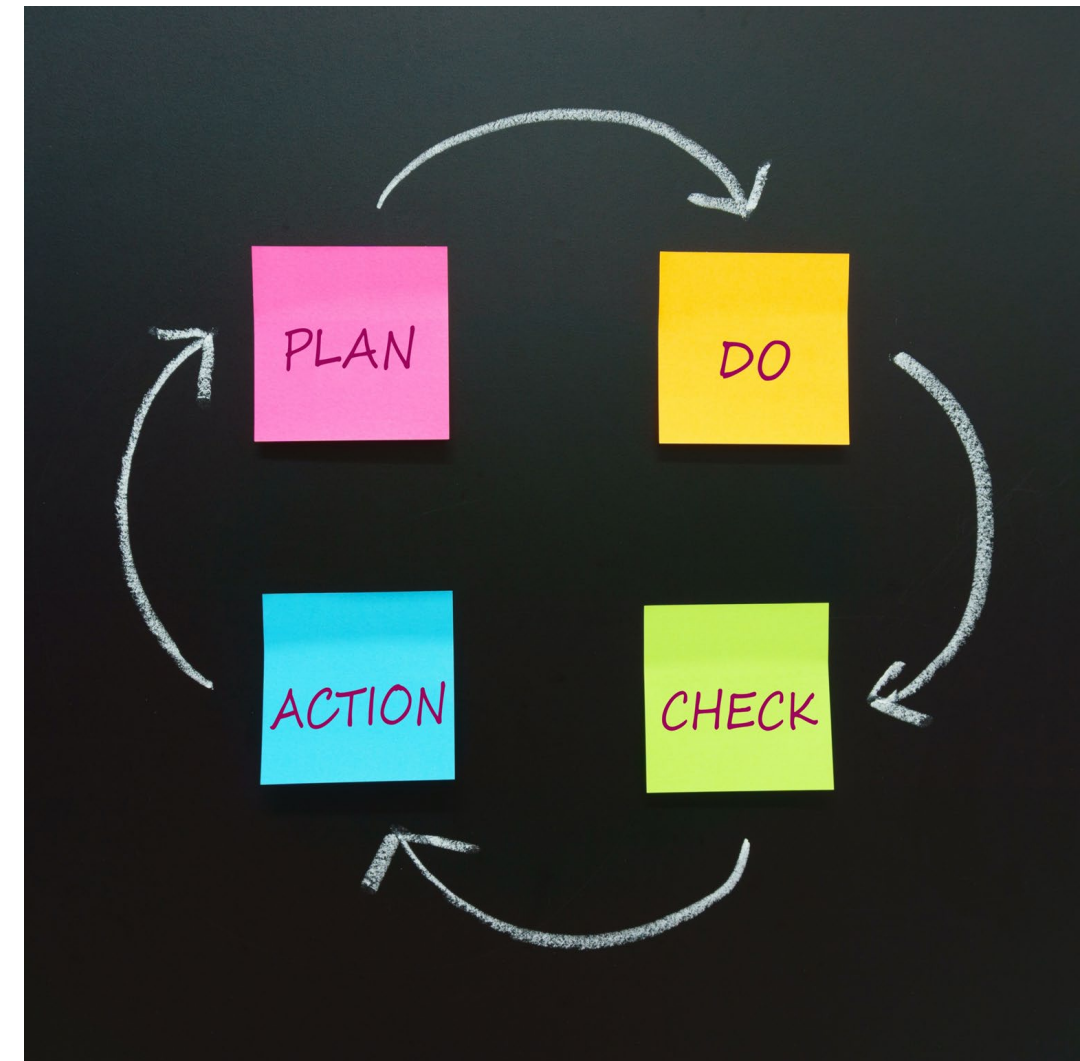
Sticking With It – Completing the Projects

- Setting goals & timelines
- Give teams time and space to implement
- Each cluster needs leads and facilitators
- Leverage Lean tools



Lessons Learned

- There is no “Done!”
- Schedule conflicts – make sure you can get a regular cadence
 - Attendance and homework
- Sharing pitfalls and wins was the most beneficial
- Commitments beyond one session can work
- Getting doers to attend



General Application



How can you apply this tomorrow?

- *Networking & Team building – working through a problem together more impactful than social hours or watching a presentation*
 - What does this mean for Lean onboarding on projects
- *Rapid learning groups within project teams? Parallel shared evolution of process implementation, with structured feedback*
- *Cross company groups*

How can you apply this tomorrow?

- *Experimental nature of learning & new process implementation- lower barrier to getting started*
 - Maximizing data through parallel collaboration
- *Study Action Teams – parallel but different*
- *Lean evolution leaves the classroom*
- *Format for rapid research/experimentation*

Q/A & Takeaways





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In the spirit of continuous improvement, we would like to remind you to complete this session's survey! We look forward to receiving your feedback.

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Thank you for attending this presentation. Enjoy the rest of the 23rd Annual LCI Congress!