

26<sup>TH</sup> ANNUAL

26<sup>TH</sup> LCI CONGRESS  
OCTOBER 22-25, 2024

# Embracing the Leader Role in Creating Ideal Conditions and Coaching Problem Solvers

SURFING THE WAVE OF LEAN DESIGN AND CONSTRUCTION




Tracy O'Rourke, JIT Cafe  
Tuesday October 22<sup>nd</sup> Workshop 8-12pm


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## In an Ideal Lean World



What do you see?



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## Learning Objectives

**After completing this session, you will be able to:**

- Describe the challenge of changing mindset
- Recognize two main Lean leader responsibilities
- Examine options for leaders to create better routines, build better habits and ultimately strengthen problem-solving culture



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## Agenda

Two key leader roles:

- Creating ideal conditions
- Building problem-solving muscles

Leader Routines

- Idea Boards
- Daily Management Huddles
- A3 Use and Coaching
- Leader Task Boards
- Leader Process Walks
- Leader Standard Work



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## The Challenge: Changing Mindset

Lean Six Sigma  
tools applied

Existing  
management  
mindset and  
practices



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## Thawing The Frozen Middle



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## Two Lean Leader Responsibilities

1. Create Ideal Conditions
2. Commit to Growing Problem-Solvers



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## Create Ideal Conditions for Continuous Improvement to Thrive

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## Culture Is Not Cookie Cutter



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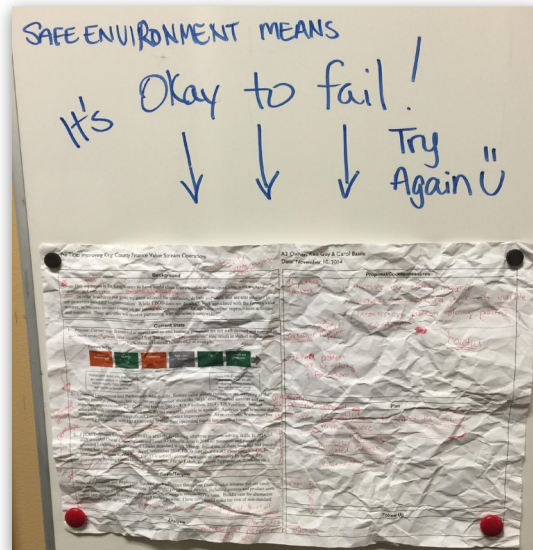
## Reduce Fear

- Create psychological safety
- Support a blame-free environment
- Recognize behaviors that create a search for the guilty
- Focus on the process, not the people
- Recognize and acknowledge desired behaviors
  - Asking why
  - Calculated risk-taking
  - Making process problems visible



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## Make It OK To Experiment



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**“ Culture is created by what  
is tolerated and promoted.”**

**- Dr. Henry Cloud -**



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## What is Promoted by Leaders?

- A blame-free environment
- Psychological safety
- Focus on process not person
- Making problems visible
- Continuous Improvement
- Joy
- Camaraderie
- Collaboration



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## What is Tolerated by Leaders?

- Staying late
- Coming in early
- Reading and sending emails on the weekend
- Bullying
- Blaming
- Fear
- Disrespect
- Working in Silos



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## Culture Reflection

What cultural behaviors are promoted and/or tolerated in your organization?  
Some behaviors have a positive impact and some have a negative impact.

What is <b>promoted</b> in your organization?		What is <b>tolerated</b> in your organization?	
Positive	Negative	Positive	Negative



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## A Necessary Job For Leaders



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## Defending Your Culture

*"When I started my organization,  
nobody told me that half of my energy  
would be spent building it,  
and the other half would be spent  
protecting and defending it against all  
of the things other people wanted it to  
be."*

-Excerpt from *Boundaries for Leaders*  
By Dr. Henry Cloud



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## Southwest: Defending the Culture



We operate with a  
Warrior Spirit,  
a Servant's Heart,  
and a Fun-LUVing  
Attitude.



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## Reflection

In order to promote or defend the culture you want,  
What do you need to Stop, Start or Continue to do?

**Stop**

**Start**

**Continue**

1. Identify individual leader behaviors
2. Be sure they are actions or behaviors, not results



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## Commit to Building Problem-Solvers

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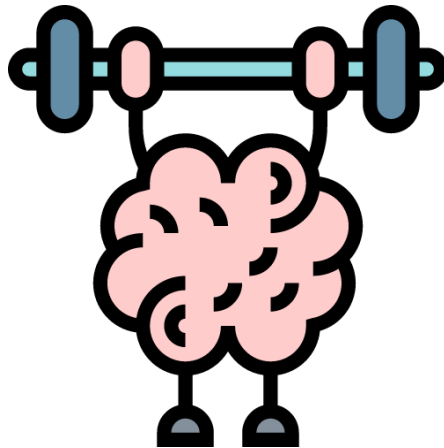


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## Build the Problem-Solving Muscle



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## Leadership Philosophy



Be a Mentor



Not a Hero

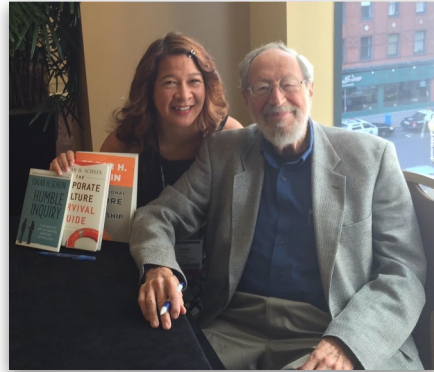


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## Leader/Coach Challenge

Do three things better:

1. Do **less** telling
2. Learn to ask in the particular form of ***Humble Inquiry***
3. Do a better job of **listening** and acknowledging



Tracy O'Rourke and Edgar Schein



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## Inquiry Exercise

1. "Here's what went wrong..."
2. "This is what needs to be done..."
3. "This idea needs to be implemented..."
4. "The problem is..."



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## Grow Your People



**Be a mentor**



**Not a hero**

### Ask, Don't Tell:

- What do you see?
- What have you learned?
- What do we need to do to improve the current condition?
- What interrupts our flow?
- What do you think the best approach would be?
- What do we need to do next?
- What are your ideas?
- What do you recommend?
- How can we make the abnormal condition more visible?
- How can I help support you?



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## Define Leader Responsibilities With Leader Routines

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## Why Leader Routines?

- New settings with old habits won't work
- Critical to Lean Management System
- Guides leaders in their roles
- Supports leaders in doing what matters



**Don't let the system manage you....  
Initiate a Lean Management system**



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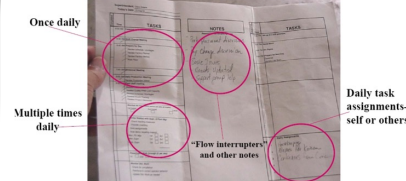
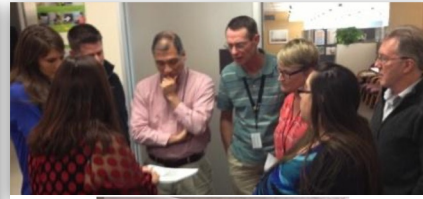
*"It is not enough to do your best;  
you **must know what to do**,  
and then do your best."*

**- W. Edwards Deming**



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## Leader Routines: Leader Standard Work

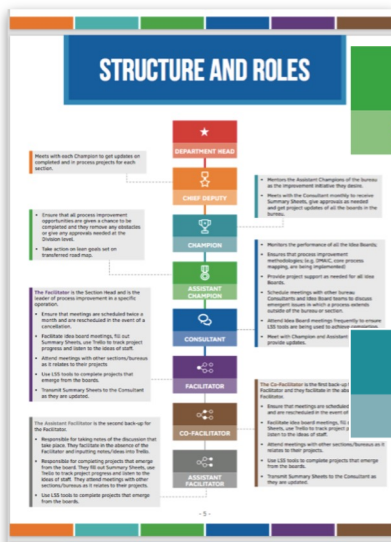


A set of daily, weekly actions or tools that leaders apply to build and sustain a continuous improvement mindset and culture.



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## Sample: Roles & Responsibilities



- Ensure that all process improvement opportunities are given a chance to be completed and they remove any obstacles or give any approvals needed at the Division level.
- Take action on lean goals set on transferred road map.

- Mentors the Assistant Champions of the bureau as the improvement initiative they desire.
- Meets with the Consultant monthly to receive Summary Sheets, give approvals as needed and get project updates of all the boards in the bureau.



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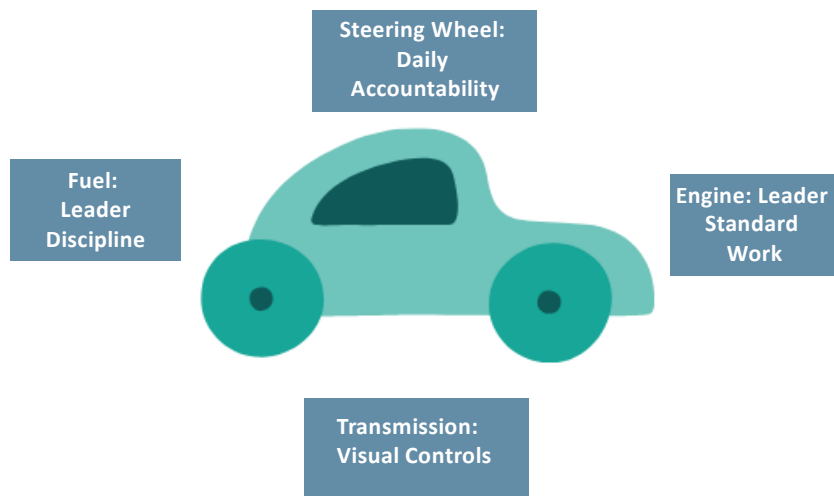
## Sample: Actions for a Lean Six Sigma Champion

Promote a Continuous Improvement Culture	Commit Time & Effort	Enlist Others
<ul style="list-style-type: none"> <li>Remove fear in the organization</li> <li>Support a blame-free environment</li> <li>Continuous Improvement included in management goals &amp; objectives</li> <li>Promote &amp; reinforce making problems visible</li> <li>Help breakdown barriers to continuous improvement</li> </ul>	<ul style="list-style-type: none"> <li>Participate in certification celebrations</li> <li>Promote dialogue of continuous improvement in staff meetings</li> <li>Attend kickoffs for Process Walks and Kaizen Events</li> <li>Participate as a sponsor in steering committee meetings</li> </ul>	<ul style="list-style-type: none"> <li>Recruit employees in: Yellow Belt, Green Belt &amp; Black Belt</li> <li>Follow-up on project work and success</li> <li>Influence key stakeholders</li> <li>Give continuous improvement a voice in strategic conversations</li> </ul>



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## Making Lean Management Go



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## Sample Leader Routines



Idea Boards



Daily Management Huddles



A3 Use and Coaching



Leader Task Boards



Leader Process Walks



Leader Standard Work



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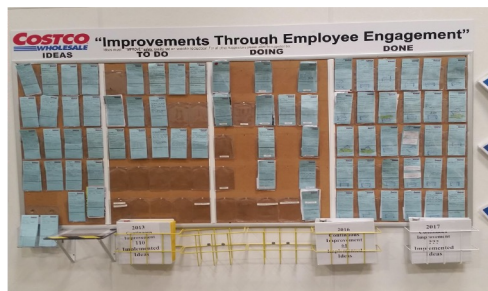
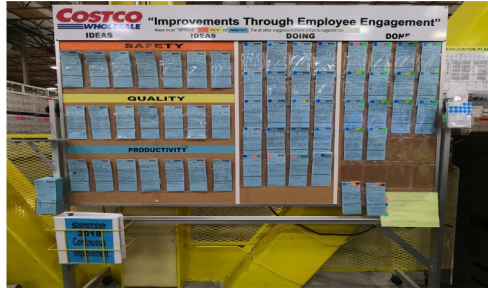
## Reflection: Check/Adjust on Current Activities

- Are there any current enterprise-wide driven continuous improvement activities (Tier-boards or Idea Boards?)
- Are there any personal routines/behaviors that you've incorporated to drive continuous improvement with your team?



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## Idea Boards



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## Sample Leader Routines



Idea Boards

Daily Management  
Huddles

A3 Use and Coaching



Leader Task Boards



Leader Process Walks

Leader Standard  
Work

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## Purpose for Huddles and Huddle Boards



- How does your team know if they're winning or losing?
- What is your scoreboard telling you?
- Daily dialogue and information exchange



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## Sample Leader Routines



Idea Boards



Daily Management Huddles



A3 Use and Coaching



Leader Task Boards



Leader Process Walks



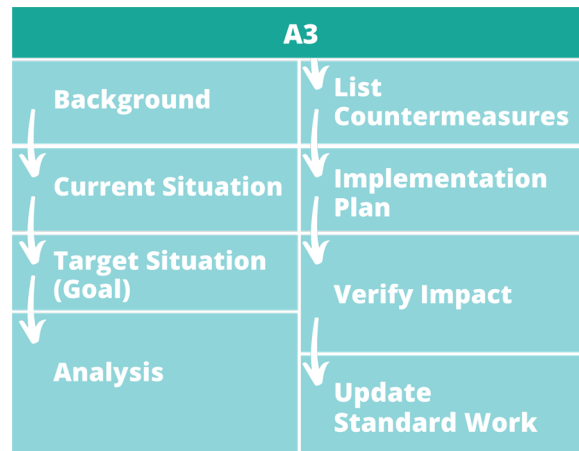
Leader Standard Work



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## What Is an A3?

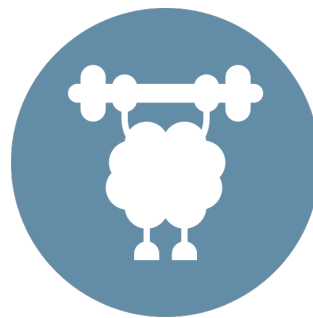
An A3 is a one-page document that shows how problem solvers are thinking through an improvement effort.



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## Your Role As A Leader/Coach

Fulfill organizational goals by building the problem-solving muscle



*“Coaching for development is about turning the focus from the issue to the person dealing with the issue. The person managing the fire.”*

- Michael Bungay Stanier



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## Challenges for Leaders/Coaches



No A3



Quality  
Questions



Unbalanced  
Feedback



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## Challenge #1: Failing to Ask for A3s

### Countermeasures:

- Have learners bring their A3 with new progress since the last coaching session
- Use the A3 during coaching sessions to ask about the improvement progress
- Follow up with calendaring the next coaching session



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## Challenge #2: Quality Questions

### Countermeasure:

- Become a student of Socrates
- Use open-ended questions
- Start with the the list or questions
- Practice, practice, practice

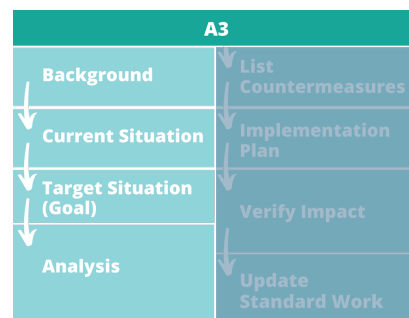


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## Good Questions For Leaders To Ask

### Left Side of the A3:

- Tell me about \_\_\_\_\_ section. What were some of the activities you/ your team did to build profound knowledge of the current condition?
- How did you/your team determine the target?
- How did you socialize this A3 with key constituents?
- What data did you collect?
- What root causes did you discover?
- How do you know these are the root causes?
- What challenges did you run into in developing the left side of this A3?



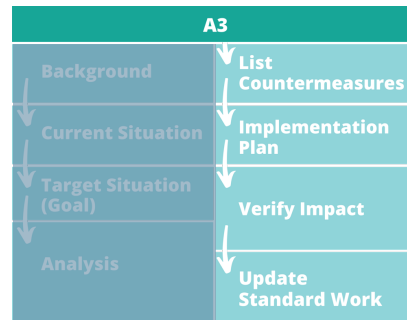
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## Good Questions For Leaders To Ask

### Right Side of the A3:

- What are some of your ideas to improve the current condition?
- Who was involved with brainstorming countermeasures?
- How did the brainstorming go?
- How did you decide on the countermeasures to implement?
- How is the implementation going?
- What kinds of challenges are you running into?

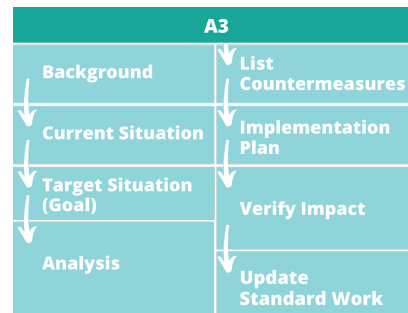


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## Good Questions For Leaders To Ask

### At the end of a Coaching Session:

- What could you do differently to make this A3 more descriptive or accurate?
- What did you learn during this coaching session?
- What are your next steps?
- When will we meet next to discuss additional A3 progress?
- Is there anything else on your mind?



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## Challenge #3: Delivering Unbalanced Feedback

### Countermeasure:

- Create pull for your feedback—make it a good experience
- Lead with the positive
- Ask them to give themselves feedback first
- Always provide positive and constructive feedback—not just one or the other



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## Feedback Format

Pluses	Deltas
Keep, like or continue	Suggestions for change



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## Feedback Application #1:

I got my  
report card...

### 2021 - 2022 HIGH SCHOOL REPORT CARD

Student: John Doe

Grade: 10th

School Year: [9/13/2021] - [6/1/2022]

Quarterly Terms : T1: 9/13/2021 T2: 11/29/2021 T3: 1/10/2022 T4: [4/4/2022]

Core Courses:

	T1	T2	T3	T4
English	B	A		
Language Arts	B-	B-		
Math	D-	D+		
Science	C-	B-		
Social Studies	A	B		
Physical Education	D	C-		
Music - Band	B	B		



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## Feedback Application #2:

I straightened  
up the forms  
storage area.  
Let me know if  
that works...



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## 2<sup>nd</sup> Coach Questions:

- How did you think you did?
- What went well?
- What could have gone better?
- What will you do differently next time?
- What else is on your mind?



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## Sample Leader Routines



Idea Boards

Daily Management  
Huddles

A3 Use and Coaching



Leader Task Boards



Leader Process Walks

Leader Standard  
Work

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## What is a Task (Kamishibai) Board?

- Visual display of green cards and red cards
- A simple check card system
- Tasks can relate to safety, quality, production, cost, and/or daily management



Task Board for Daily Management Routines



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## Managing Daily, Weekly, Monthly Tasks:



**Green** = completed.

**Red** ≠ completed

**Task Board:** Are the necessary jobs/tasks being done?



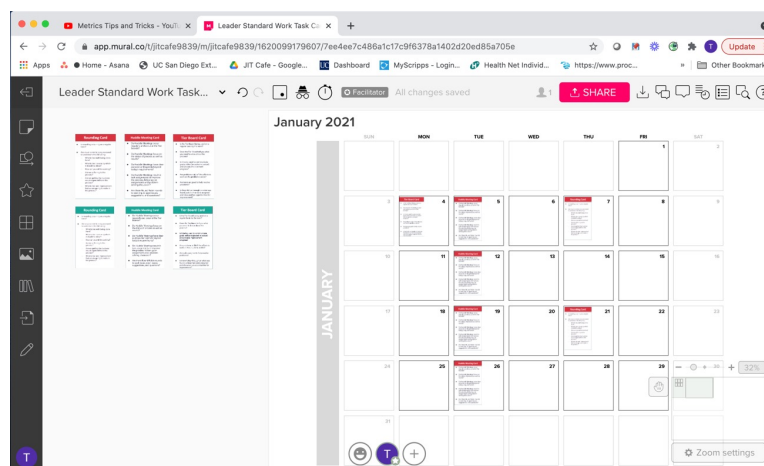
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## Task Boards in Action - Weekly & Monthly



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## Using Task Boards Virtually - Mural



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## Sample Leader Routines



Idea Boards



Daily Management Huddles



A3 Use and Coaching



Leader Task Boards



Leader Process Walks



Leader Standard Work



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## What is Leader Process Walk?

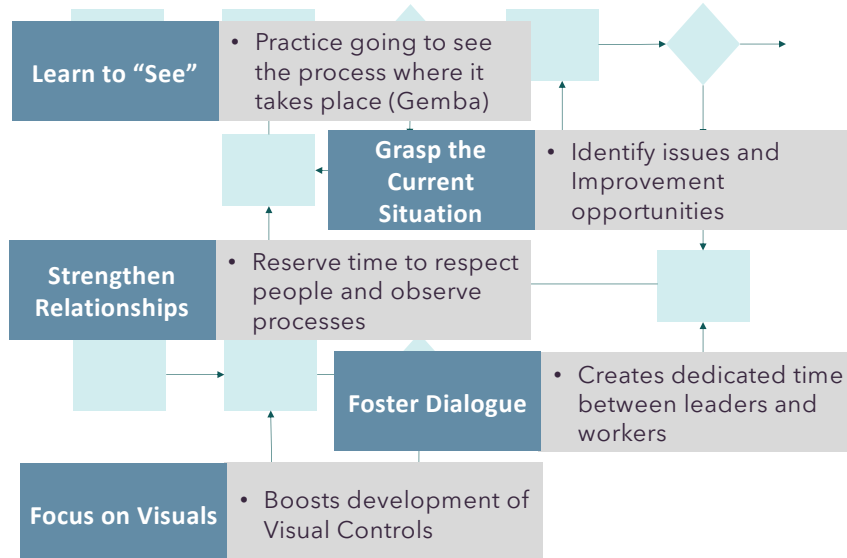
**Leader Process (Gemba) Walk:** A routine where those in charge walk through the place where work takes place (the Gemba) with Process Owners in order to grasp the current process and foster dialogue.

- "Gemba" is a Japanese term meaning "the real place"
- Leader Process (Gemba) Walks may take an hour vs. Continuous Improvement Process (Gemba) Walks which may take 2-5 hours



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## Why Are Leader Process Walks Important?

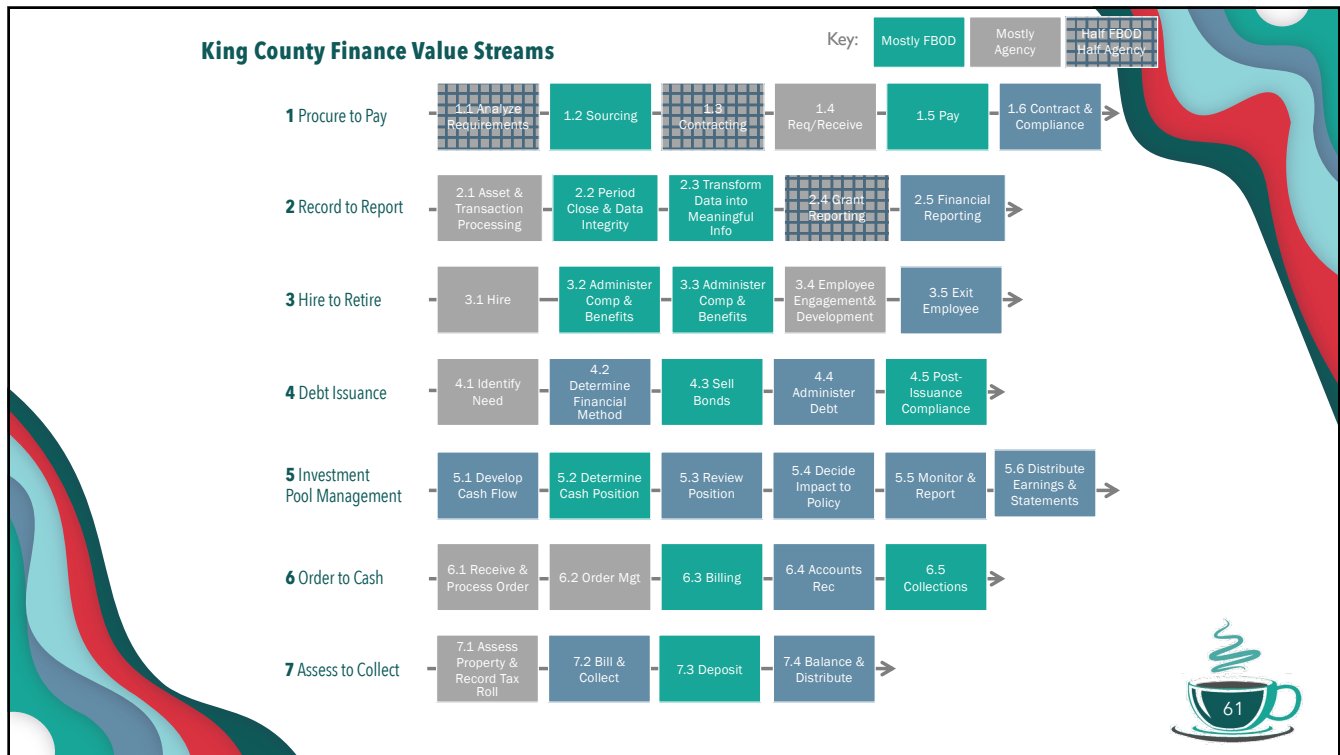


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## Case Study: Leader Process Walk



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## Case Study: Leader Process Walk

### Leader Process Walk Worksheet

Section/Team:	Date/Time:
Manager:	Director:
<b>Purpose</b> <ul style="list-style-type: none"> <li>Demonstrate respect for people</li> <li>Learning opportunity</li> <li>Understand the current process and opportunities for improvement</li> </ul>	
<b>Agenda</b>	<b>Notes</b>
<b>Context setting</b> <ul style="list-style-type: none"> <li>Introductions</li> <li>Agenda review</li> <li>Mindset: Be A student, learn about problems, visibility of problems, visual management effectiveness</li> </ul>	
<b>Value Stream Review</b> <ul style="list-style-type: none"> <li>Review Functional Value Streams</li> <li>Identify where this team fits into the Value Streams</li> </ul>	
<b>Process Review</b> <ul style="list-style-type: none"> <li>Ask open-ended questions (see pg. 2)</li> </ul>	
<b>Wrap-up</b> <ul style="list-style-type: none"> <li>Ask questions for next rounding</li> <li>Identify action items</li> </ul>	
<b>Payoff</b> <ul style="list-style-type: none"> <li>Shared learning about organizational success and challenges</li> <li>Shared understanding and accountabilitys for improvement activity</li> <li>Continued improvement of management system tools and processes</li> </ul>	

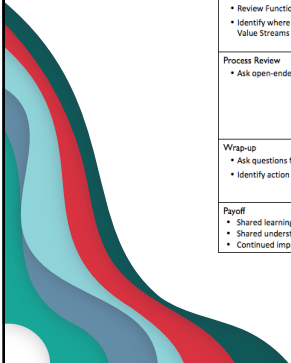
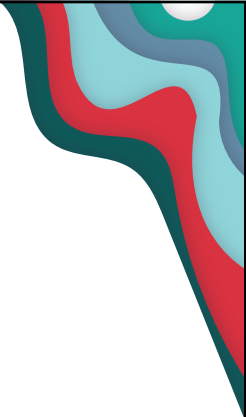

- What are possible root causes to team challenges?
- Identify Director's follow-up actions (i.e. "deep dives" on specific issues, communication to other stakeholders)

### Example Questions

**Questions to assess processes?**

- Show me what you do in this process.
- Show me the problems in the process?
- How did you learn your job? Who taught you?
- What are the ways that you check on the quality of your work?
- Are there documented procedures for this process?
- How do you know when this process is successful?
- Are we getting desired results from this process?
- How long does this process take?
- Are any of the process steps visible?
- What are the next improvement efforts for this process?

A standard for conducting Leader Process Walks

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## Sample Leader Routines



Idea Boards



Daily Management Huddles



A3 Use and Coaching



Leader Task Boards



Leader Process Walks



Leader Standard Work



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## What is Leader Standard Work?

**Leader Standard Work:** A specific record combining leader actions, tools, and behaviors with regular planning and reflection in order to build a disciplined system that sustains a Lean culture.



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## A Leader Standard Work Record Includes

### • What

- A plan for leader's work
- A way to work a leader's plan
- A way to identify what's not working



### • When

- Use daily
- Reflect & improve weekly/monthly



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## Leader Standard Work Record

A way to ensure you (the leader) are using your time effectively; working on the right things, delivering value, and developing people.

**Tasks      Notes      More Tasks**

Once daily

Multiple times daily

Daily task assignments- self or others


"Flow interrupters" and other notes

**One record per leader  
Collected and used later for reflection**



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## Leader Standard Work Record Template

Leader Standard Work Record 			
Leader Date _____		X = Completed O = Completed Late Blank = Incomplete	Interrupters and Barriers (comments)
Time	Task	Status	Notes
6:00			
7:00			
8:00			
9:00			
10:00			
11:00			
12:00			
1:00			
2:00			
3:00			
4:00			
5:00			
6:00			
7:00			

**Time:**  
1) Change times to appropriate time frames

**Task:**  
2) Add daily tasks here

**Status:**  
3) List the status of each task as:  
- X for Completed On Time  
- O for Completed Late  
- Blank for incomplete

**Notes:**  
4) Include comments on interrupters and barriers.  
These can be used for reflection later on. This will help with adaptations and updates to



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## Assess & Reflect

- **Assess:** Where do you spend your time **today?**
- **Assess:** Where do you spend your time **this week?**
- **Reflect:** Is this is where you “should” be spending your time?

*“When combined with the appropriate lean leadership behaviors, Leader Standard Work changes the role of managers from being primary problem solvers to **building the problem-solving capability of employees.**”*

- From *Lean Lexicon*, published by  
Lean Enterprise Institute



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## Images of Leader Routines



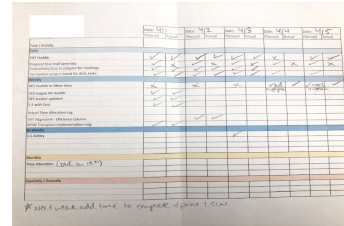
Leader Process Walks



Leader Huddle Meetings



Leader Task Boards



Leader Reflection

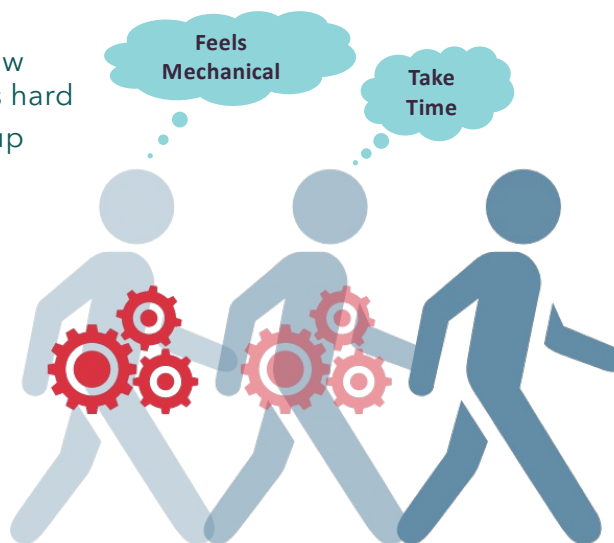
**Specific Tasks Applied Will Vary by Organization**



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## Stay the Course

- Learning new behaviors is hard
- Don't give up
- Adjust
- It will work

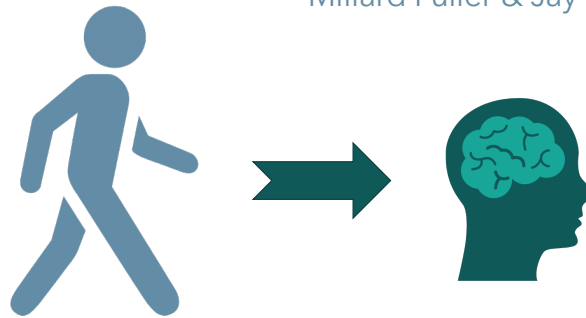


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**"It's easier to **act** your way into a new way of thinking, than to **think** your way into a new way of acting."**

- Millard Fuller & Jay McNally



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**Call To Action: What leader routine experiments will you run for the next 6-12 months?**



Leader Standard Work



Daily Management Huddles



A3 Use and Coaching



Idea Boards



Leader Task Boards



Leader Process Walks



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## Call To Action: Go on a Tour



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## What We Covered

Two key leader roles:

- Creating ideal conditions
- Building problem-solving muscles

Leader Routines

- Idea Boards
- Daily Management Huddles
- A3 Use and Coaching
- Leader Task Boards
- Leader Process Walks
- Leader Standard Work



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**"People do not decide their  
futures, they decide their habits  
and their habits decide their  
futures."**

- F.M. Alexander



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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!!

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