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Daily Process Analysis Activities

On a daily basis, each process owner should:

- Summarize process performance from the previous day
- Update the performance summary spreadsheet
- Identify how time and other key expenses were spent
- Complete a daily dashboard report
- Add 5 – 10 key errors, defects, and failures to the database
- Spend time with people to examine process performance trends and changes
- Ask questions to help identify possible causes (use the TapRoot® RCA questions if possible)



DON'T forget to spend some time on improvement projects!

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Be Proactive with Process Improvement

By Kevin McManus, kevin@greatsystems.com

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95% of our problems are caused by systems design, not people. Human error and equipment failures are rarely, if ever, root causes. Keep improving!

How to Practice Proactive Process Improvement

I regularly tell my peers and colleagues that I would not want to do any type of management job, no matter how well it paid, if I was not allowed to trend process performance on a daily basis.

Plus, I believe that you cannot consistently improve process performance, let alone sustain high levels of performance over time, without process-level analysis.

The use of line charts, checksheets, error tracking databases, and Pareto charts on a regular basis is a must for effective process performance analysis and improvement opportunity identification.

Why? It's simple. I hate to be blindsided by surprises. As a plant manager, I learned that it is stressful enough to consistently meet shifting customer expectations. I don't need unexpected process problems that distract the team, break our flow, disrupt the process, and cost precious time and money.

That said, I will unfortunately tell you that a lot of organizations don't use these tools on a regular basis. Usually, they only review snapshots of process performance on a weekly or monthly basis. The percentage of companies that use trend lines and Pareto charts to look at performance on a daily, process-specific basis, in my opinion, does not even equal fifty percent.

To become a high-performance workplace or organization, each process owner needs to track around 5-10 key process counts each day. Plus, they need to do this for all key performance areas - safety, quality, cost, and people. *Process owners MUST know how they spend the time and money they are responsible for each day!*

Most importantly, this must happen at the transaction level! Once you have the counts, you can create trend lines with control limits for your ratios. This helps you better understand process variation.

You can, and should, use technology to help you capture and analyze this information. However, you cannot convince me that one can sustain continuous improvement if they only do these tasks once a week, or less. If you follow the guidelines I propose, you quickly begin to notice the impact of errors, defects, and failures that you may have been aware of, but accepted as being normal or a mere nuisance.

Additionally, ALWAYS include transaction time, delay, and defect costs in your daily process measure mix. If you do, you soon will be able to use process transaction costs as a key process effectiveness gauge. Work to consistently reduce process transaction costs over time. This cost control strategy is a much more effective approach versus monthly budget line item management.

How Do You Know If You're Improving?

Daily waste tracking and performance trending are critical when pursuing process excellence

- What are your key performance areas?
- What are your key processes?
- What are your key performance measures?
- What are your primary types of errors, defects, and failures?
- What are your process transaction costs?



What types of performance do you trend over time?

Make Proactive Process Improvement a Daily Work Habit

In order for process excellence from the inside out to work, it has to become a daily work habit. Plus, I think it is key that each process owner enter their own data each day.

Don't just have someone else do it for them and give them a summary report. Also, you can have other people help you collect the data. In fact, this is recommended.

However, I have learned that there is value to gain when a process owner enters numbers into their own performance summary spreadsheet, completes their own daily dashboard, and updates their own error tracking database. There is something about the re-entry of a common downtime problem five times in a database on one day that tends to make that problem more obvious than a summary line item on a report.

Each morning (at the start of my shift), I began the day by crunching the numbers. Often, the information I needed was on a variety of reports that my people had completed at the end of their shift the day before. At other times, I had to go out and ask people for more details about what had happened for a given mistake or failure.

Effective leaders understand how the time and money they are responsible for each day is spent. Proactive process improvement tools help you capture this daily information for measurement and analysis purposes so you can spend that time and money more wisely in the future.

Recognize that you have to spend time with your people for this process to work. Your people are sources of information for improvement options and problem investigation. You also have a responsibility to give them daily positive and negative feedback about personal and process performance. You can't recognize, coach, and learn from others by sitting behind a desk!

Finally, recognize that human error is not a root cause of a problem. Look for the weak, or missing, systems that should have helped prevent the problem from becoming larger. Focusing on finding someone to blame is not an effective strategy for preventing future errors.

Over time, leaders should help their team understand the different factors that affect human error rates. Teach them how to assess the daily risk associated with their work. Show them how different error-producing conditions increase error likelihood when present. When such practices become leader standard work – daily work habits – proactive process improvement is in place.

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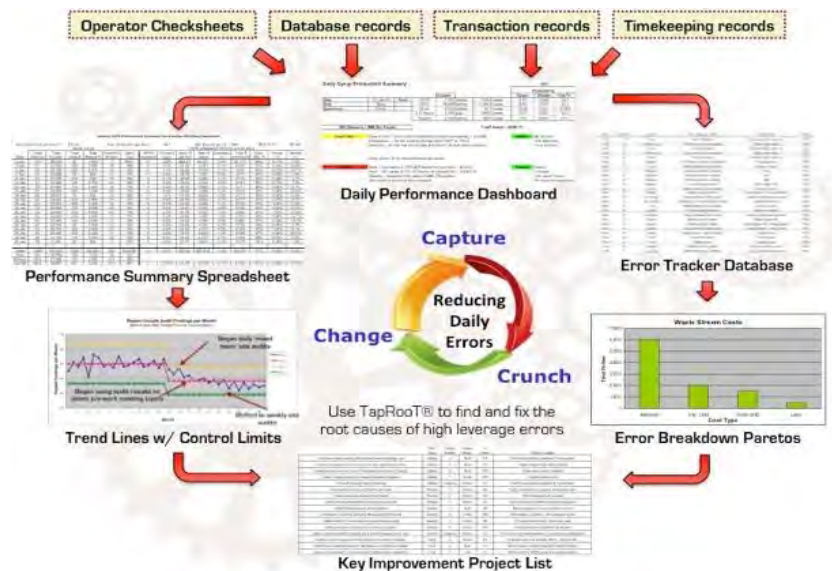
DON'T forget to spend some time on improvement projects!

Use the Capture – Crunch – Change Process Daily

This diagram summarizes how to use the different tools I share in this eBook on a daily basis to help drive proactive process-level improvement.

These tools help you *capture transaction-level costs, counts, ratios, errors, and failures DAILY at the process level.*

The original data comes from a variety of sources. Possible sources include timekeeping records, database, and other transaction-specific records. Also, checksheets operators complete may provide key error and failure information.



Look for ways to use new technology for lean data capture. For example, replace hand data entry with QR code scans. Use triggers and notifications to prompt people when special process needs or hazards exist in the work for that day. Let geofences and RFID technology help you capture dates and times for key process steps and transaction processing.

The **performance summary spreadsheet** captures key counts and ratios for the team’s workday (one row per day). Plus, it converts process counts into ratios for trend analysis. Finally, the process owner uses the daily performance dashboard (one report per day) to share the results with others.

The **daily performance dashboard** captures key problems for that day, such as errors, defects, downtime, rework, scrap, and wait time. Then, the problems and their attributes enter the **Error Tracker database** (master list of problems) for future analysis. Typically, trend line and error breakdown Pareto analysis is done monthly. However, one can easily view aggregate data, or data splits, at any time.

I learned a lot simply entering the key counts and ratios, along with the key problems, each day. This daily data entry gave me a pretty good idea as to what changes were needed and how well my recent fixes were working. Monthly summaries provide a snapshot of your current key problems and the types of improvement progress being made.

The **key improvement project list** provides a common location to hold for all ongoing, planned, and ‘on hold’ ideas that the team identifies. The first five columns provide space for the idea description, owner, status, completion date, and next steps.

Perhaps more importantly, a sixth column exists to capture the current completion percentage for each project. When you compare monthly reports over time, **the ‘Percent Complete’ column** helps identify slow moving projects that may require additional resources or support.

Capture Key Daily Transaction Counts and Ratios

Do you want to require each process owner to improve those processes that he or she is responsible for? If so, the use of a tool similar to the example shown helps.

Capture Key Process Counts and Ratios

Leaders use the **performance summary spreadsheet** on a daily basis to monitor the number of process transactions that they complete in a given day. Plus, the tool captures the cost of those transactions and other key inputs and ratios that are part of their execution.

January 2016 Performance Summary for Injection Molding Department

Avg. Labor Cost per Hour = \$12.50 Avg. Production per Day = 441 588 Pounds per Hr = 450 Melt \$ / # = \$0.140

| Date | BASE DATA | | | | PERFORMANCE RATIOS and LEVELS | | | | | | | | | | | |
|---------|---------------|--------------|---------------|----------------|-------------------------------|------------|----------------|---------------|------------------|----------|------------|--------------------|----------------|---------|----------|--|
| | Total Man-Hrs | Total Pounds | Total Scrap # | Total Rework # | Downtime Minutes | Labor Cost | OSHA Accidents | % Output Gain | Labor \$ per M # | Melt \$ | Downtime % | Total \$ per Pound | Dept. Effic. % | Scrap % | Rework % | |
| 4-Jan | 65 | 28,600 | 90 | 1,500 | 5 | \$813 | 0 | -0.2% | \$28.41 | \$4.221 | 1.0% | \$0.176 | 98% | 0.17% | 5.0% | |
| 5-Jan | 71 | 31,000 | 150 | 3,000 | 10 | 888 | 0 | -1.0% | 28.63 | 4.781 | 2.1% | 0.183 | 97% | 0.44% | 8.8% | |
| 6-Jan | 58 | 25,140 | 200 | 4,500 | 15 | 725 | 0 | -1.7% | 28.84 | 4.178 | 3.1% | 0.195 | 96% | 0.67% | 15.1% | |
| 7-Jan | 62 | 27,500 | 50 | 900 | 0 | 775 | 1 | 0.6% | 28.18 | 3.927 | 0.0% | 0.171 | 99% | 0.18% | 1.8% | |
| 8-Jan | 63 | 27,200 | 250 | 750 | 10 | 788 | 0 | -2.1% | 28.95 | 3.948 | 2.1% | 0.174 | 98% | 0.89% | 2.7% | |
| 11-Jan | 71 | 31,240 | 125 | 2,700 | 20 | 888 | 0 | -0.2% | 28.41 | 4.769 | 4.2% | 0.181 | 98% | 0.37% | 7.9% | |
| 12-Jan | 59 | 25,960 | 175 | 1,400 | 10 | 738 | 0 | -0.2% | 28.41 | 3.855 | 2.1% | 0.177 | 98% | 0.64% | 5.1% | |
| 13-Jan | 60 | 25,400 | 300 | 7,500 | 25 | 750 | 0 | -4.0% | 29.53 | 4.648 | 5.2% | 0.213 | 94% | 0.90% | 22.6% | |
| 14-Jan | 66 | 29,510 | 75 | 600 | 5 | 825 | 1 | 1.4% | 27.96 | 4.226 | 1.0% | 0.171 | 99% | 0.25% | 2.0% | |
| 15-Jan | 65 | 28,420 | 225 | 1,400 | 15 | 813 | 0 | -0.9% | 28.59 | 4.206 | 3.1% | 0.177 | 97% | 0.75% | 4.7% | |
| 18-Jan | 63 | 27,600 | 300 | 1,000 | 15 | 788 | 0 | -0.7% | 28.53 | 4.046 | 3.1% | 0.175 | 97% | 1.04% | 3.5% | |
| 19-Jan | 70 | 30,950 | 175 | 5,600 | 20 | 875 | 0 | 0.3% | 28.27 | 5.142 | 4.2% | 0.194 | 96% | 0.48% | 15.2% | |
| 20-Jan | 59 | 24,800 | 450 | 8,500 | 35 | 738 | 0 | -4.7% | 29.74 | 4.725 | 7.3% | 0.220 | 93% | 1.33% | 25.2% | |
| 21-Jan | 62 | 26,830 | 250 | 4,300 | 5 | 775 | 2 | -1.9% | 28.89 | 4.393 | 1.0% | 0.193 | 96% | 0.80% | 13.7% | |
| 22-Jan | 63 | 27,480 | 100 | 6,500 | 0 | 788 | 0 | -1.2% | 28.68 | 4.768 | 0.0% | 0.202 | 97% | 0.29% | 19.1% | |
| 25-Jan | 67 | 29,700 | 25 | 1,250 | 0 | 838 | 0 | 0.5% | 28.20 | 4.337 | 0.0% | 0.174 | 99% | 0.08% | 4.0% | |
| 26-Jan | 61 | 26,750 | 325 | 2,400 | 20 | 763 | 0 | -0.6% | 28.50 | 4.127 | 4.2% | 0.183 | 97% | 1.10% | 8.1% | |
| 27-Jan | 60 | 26,250 | 300 | 5,300 | 5 | 750 | 0 | -0.8% | 28.57 | 4.459 | 1.0% | 0.196 | 97% | 1.04% | 16.6% | |
| 28-Jan | 68 | 30,100 | 110 | 3,200 | 15 | 850 | 0 | 0.4% | 28.24 | 4.677 | 3.1% | 0.184 | 98% | 0.33% | 9.6% | |
| 29-Jan | 70 | 31,500 | 25 | 500 | 0 | 875 | 0 | 2.0% | 27.78 | 4.484 | 0.0% | 0.170 | 100% | 0.08% | 1.6% | |
| Totals | 1,293 | 561,910 | 3,660 | 52,400 | 230 | \$16,038 | 4 | -0.7% | \$28.54 | \$87,918 | 2.4% | \$0.188 | 97% | 0.58% | 9.9% | |
| Avg. | 64 | 28,096 | 183 | 3,120 | 12 | 813 | | | | | | | | | | |
| 15 Avg. | 65.5 | 27,904 | 193 | 3,200 | 13.5 | 825 | | | | | | | | | | |
| Jan '15 | 66.3 | 25,867 | 201 | 3,343 | 15.1 | 847 | 5 | -11.5% | 32.74 | 4.118 | 3.1% | 0.192 | 87% | 0.68% | 11.4% | |

It may be the case that your processes don't go through multiple cycles in a shift or day. If that is true, you still need to use this tool. However, you only need to update the spreadsheet as you complete a given cycle, instead of daily.

Because this spreadsheet captures data in table form, you can easily trend and analyze it further. For example, you can construct charts for both individual input and ratio trends. Plus, such data helps you examine correlations that may exist between different numbers (such as rework and throughput rates).

The goal of this tool's use is to capture all key inputs associated with the execution of one or more process cycles. Once you collect the inputs, you can create a variety of time-based, and cost-based, ratios to help you better understand, evaluate, and improve your process.

Consider the use of no-code application software such as [QuickBase](#) to help you capture data at the process source. Plus, these cost affordable solutions minimize data entry errors, data entry costs, and data analysis delays. Set up correctly, their use can quickly become an effective work team engagement strategy.

One of the mistakes organizations make relates to the combination of data from different processes together into one big number. For example, this is what we do when we only look at performance to budget on a monthly basis as an attempt to control labor costs. When we are under budget, we relax. When we are over budget, we try to come up reasons why we are in this position. We ask people to do a better job at cost control.

Unfortunately, we often look at the performance of several processes when we evaluate our costs in this manner. In turn, we mix good process performances with bad process performances. When we mix process data, it becomes more difficult to target those processes that need our attention the most.

Worse yet, we struggle to find and recognize those people whose processes did show improvement in the most recent month. How do you analyze process performance? Do you really know how excellent your processes are without great process data?

Capture Key Daily Errors and Failures

Before computers, it was much more difficult to capture and analyze the key errors, defects, and failures of a given process on a regular basis.

One would have to obtain stacks of paper reports and draw a grid for data capture. Then, they could begin the process of going through hundreds of reports to collect a piece or two of data from each one.

Now, we have spreadsheets and databases that most people can learn how to use. In turn, we can easily capture and analyze those key problems that result in time or financial waste.

Capture Daily Process Errors and Failures

| Date | Duration | Location | Error or Failure Type | Action Taken | Product |
|-------|----------|--------------|----------------------------------|-----------------------------------|---------|
| 1-Oct | 12 | Filler | Filler overflowed | Adjust probes / clean up | 750 G |
| 1-Oct | 14 | Bottle Coder | Coder not printing consistently | Adjust coder setup | 750 G |
| 2-Oct | 8 | Filler | Filler overflowed | Adjust probes / clean up | 750 G |
| 2-Oct | 5 | Bottle Coder | Coder not printing consistently | Adjust coder setup | 750 G |
| 3-Oct | 9 | Filler | Filler overflowed | Adjust probes / clean up | 750 G |
| 3-Oct | 8 | Capper | Cap grippers need to be changed | Change gripper | 750 G |
| 3-Oct | 7 | Line | Broken bottle on accumulator | Clean up mess | 750 G |
| 4-Oct | 17 | Naturals | Wait time between naturals | Wait | 750 G |
| 4-Oct | 19 | Naturals | Wait time between naturals | Wait | 750 G |
| 4-Oct | 28 | Naturals | Wait time between naturals | Wait | 750 G |
| 4-Oct | 40 | Naturals | Low brix naturals batch | Recirculate / wait | 750 G |
| 4-Oct | 11 | Line | Broken bottle on accumulator | Clean up mess | 750 G |
| 8-Oct | 15 | Capper | Missing caps on bottles | Adjust capper - first two batches | 750 G |
| 8-Oct | 15 | Box Coder | Setup problems - int'l cases | Improve coder setup process | 750 G |
| 8-Oct | 10 | Box Coder | Resetup to run 20 more GDR cases | Resetup box coder | 750 G |
| 8-Oct | 8 | Line | Broken bottle on accumulator | Clean up mess | 750 G |
| 8-Oct | 33 | Labeler | XYZ back panel problems | Adjust 2nd labeler | 750 G |

For machine learning to occur, we must have data in table form. This allows comparisons and correlations to be analyzed. I consistently use error tracking databases similar to the downtime example shown above to reduce downtime, rework levels, product waste, late deliveries, customer complaints, and freight claims.

This tool is easy to use. However, you must commit to a new daily work habit. *You must capture your key errors, defects, and failures each day.* Most organizations do a pretty good job of this with visible process failures, such as recordable injuries. However, it is rarely the case where each process owner can show you a similar database for the processes they are responsible for.

What types of problem tracking databases do you use in your organization? Are you using them to help identify and make improvements in all key performance areas, such as safety, quality, people, and cost?

Once you have set up the database and made the commitment to capture your key errors, defects, and failures each day, you are in a position to use trending and Pareto analysis to identify high leverage waste areas. By using the sorting, query, and graphing functions that are common to software packages like Excel and Access, you can easily produce charts that visually show you where your problem areas are.

However, this is difficult to do without creating the pictures. Look at the above example which is only sorted by date – can you easily spot where the problem areas are? What degree of loss is this process experiencing each day?

Additionally, we often fail to recognize a problem’s significance until we analyze its occurrence frequency and duration. Instead, we grow complacent and begin to accept our process waste as just part of the way things are. For example, don’t view daily data entry by a supervisor’s hand as leader standard work.

Provide Daily Process-Focused Performance Feedback

Providing balanced performance feedback on a daily basis is perhaps the best way to develop an improvement-oriented work culture that focuses on all areas of importance. My experience has taught me that the phrase “No feedback, no motivation” makes a lot of sense.

Do your people only get feedback specific to their daily contributions on a weekly, monthly, quarterly, or annual basis? If so, they have relatively less motivation to improve.

If leaders only provide feedback specific to a certain performance area, such as throughput, people are less likely to consider safety, quality, or morale measures to be as important as the measures they mention often.

I used the above daily dashboard on a daily basis to provide my people with performance feedback in the areas of safety, quality, people, and cost. Because I would change this information each day, and I would try to present it in an easy to read and understand manner, I found that my folks would actually look at it and comment about it. My maintenance people would even give me feedback about the accuracy of certain downtime events I would list!

Some people had interest in the details, but others did not. However, almost everyone would look at the colors. They knew that a ‘four green’ day was a great thing to accomplish. Plus, they learned over time how different waste events, such as downtime, absences, or quality problems, can affect the larger production system – the value stream itself.

Most of them knew if they had experienced a good day or not when they left the plant each night. However, the daily dashboard helped explain why the day did not go as well as one might have hoped for.

You can create a daily dashboard similar to this one for any process. If the process does not have a daily cycle, you may not be able to give people cycle time feedback each day. However, you can still let them know what key waste events hurt performance. The tool helps you quickly share significant accomplishments when they occur. Finally, you can use it to compare the day’s performance with past performances.

Many organizations use the color code approach to reflect different levels of performance. Plus, it is now common to look at a variety of performance areas. However, a much smaller percentage actually give people daily process-level feedback. Such feedback helps each work team focus on their key waste areas and inspires higher levels of performance.

Daily Process Dashboard

Daily Syrup Production Summary

| | | | | | | | 021 | | | |
|------------|-----------|-------|-----------|--------|---------|---------|--------------|-----------|--------|--------|
| | | | | | | | Productivity | | | |
| | | | | | | | \$/case | \$/bottle | Hrs/Th | |
| Date: | 21-Jan-04 | Prod: | 750 P | 7,252 | bottles | 959.8 | cases | 0.51 | 0.068 | 36.7 |
| Shift | Days | | 750 G | 38,068 | bottles | 3,299.8 | cases | 0.50 | 0.043 | 36.3 |
| Supervisor | Kevin | | 50 ml | 2,000 | bottles | 16.7 | cases | 43.26 | 0.361 | 2418.0 |
| | | | 5 G Sauce | 5,400 | jugs | 900.0 | cases | 0.57 | 0.095 | 42.4 |
| | | | Rework | 2,160 | bottles | 180.0 | cases | 1.15 | 0.096 | 81.1 |

966 Borders / WM Six Packs

Lost Time: Case Coder -- 5 min used to adjust case coder print quality -- 021404
 Changeover -- 46 min used to change from 750 P to 750 G
 Batching -- 24 min lost due to high brix batch / no test before transfer

Other Costs: \$118 - Make Borders six packs

Quality: Hold -- One batch of 750 GER Vanilla for high brix -- 021435
 Hold -- 367 cases of 750 SF Vanilla for suspect pH -- 021407-9
 Rework -- Inspected 180 cases of SBX 750 product
 120 cases of rework to be processed

1 int'l batch - GER (1)

Safety: No injuries
 0 on light duty
 0 out on injury

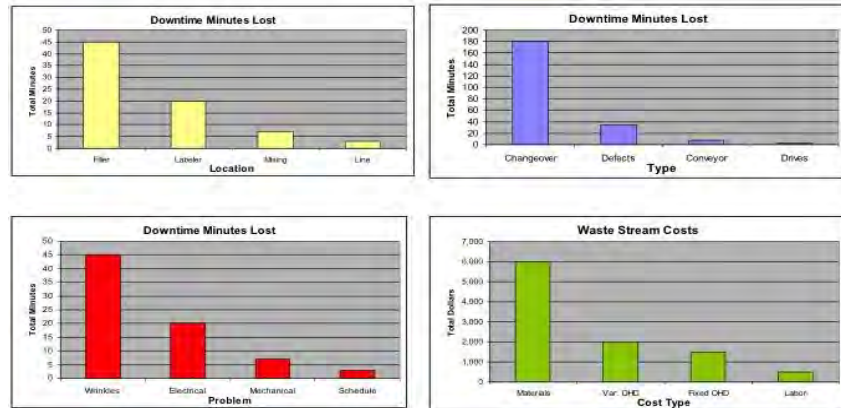
People: 0 tardy
 0 absent
 70% perm. Hours
 8.8 hours of setup time

Find and Fix Your High Leverage Process Problems

Pareto charts are one of the seven basic quality tools. However, many people do not know what a Pareto chart is if you ask them. If you don't believe me, give it a try. Ask your leadership team members if they know what a Pareto chart is or not.

Most of the process owners I ask this question of do not know what a Pareto chart is by name. However, when they see one, they do recognize the declining bar pattern. They have seen them before (just not very often).

Pareto Charts Help Spot Big Problems



In today's management performance review world, pie charts have taken the place of Pareto charts to a large extent. Both chart types reflect the same form of data analysis. They both give you a percentage breakdown of something. However, I still favor, and recommend, Pareto charts over pie charts. Why? It is simply because a difference in bar height is much easier to see than a difference in wedge width.

Once you collect a fair amount of data (20-30 records) in your error tracker database, you can use Pareto charts to help you find high leverage improvement areas. Keep in mind that these charts can be of a cost or frequency nature. The norm is to create frequency-based Pareto charts. However, you can also display any frequency Pareto in cost form! A frequency Pareto chart looks at the percent of total occurrences. A cost Pareto chart looks at the percentage of total costs.

Pareto charts are not trend lines. They only give you a snapshot of process performance. However, their use is important when it comes to determining which problem areas should have resources allocated towards their resolution. When you compare charts over time, you should be able to see big bars go away, or get smaller, as your fixes take effect.

We would love to be able to fix all of our problems all at once, but that is simply not possible. Resource limitations exist. The use of Pareto charts on a regular basis helps you prioritize your process problems. This, in turn, helps you make sure that the wheel that needs the grease gets it, instead of always greasing the one that squeaks the loudest.

Know Your Process Problems

One of the main reasons that suggestion systems can send me off on a rant is simple – a supervisor (process owner) should know where their problems are and what their options for fixing those problems are.

They should be in touch with their people enough to have collected a comprehensive list of possible improvement ideas from them.

That said, I also know that this is not the case in most organizations. Believe it or not, many process owners do not even know where all of the safety hazards exist within their areas of responsibility, not to mention other process hazards such as downtime, waste and rework, or other process non-conformities.

A dot map, similar to the one shown above, is a simple tool that can be used to make all currently identified workplace hazards visible. Colored dots can be used on this map to identify different types of hazards. You can even write in the dots if they are large enough to indicate the degree of risk associated with the identified hazards or the date it was identified.

Best yet, once you have posted such a map in the work area or break room, you can ask your people if they know of hazards that have not been identified on the map yet. Odds are, they will point some out.

The error tracker database we looked at earlier will help you prioritize your problems, but I think it is always good to know where a high percentage of your potential ‘land mines’ are. I also find a lot of value in giving my people a way to help me make sure I know where their key concerns lie and where high potential process problems exist that I might not be aware of. A dot map can help you do this.

We use spray charts and shot charts all of the time to help understand a batter’s hot and cold zones, where a basketball player tends to make a higher percentage of his or her shots from, and where to place our infielders and outfielders. These charts are dot maps. They show process performance tendencies by identifying frequency of occurrence.

If they work for your favorite sports team, is it possible that they might work for you as well from a process improvement perspective? Do you know where your hazards are?



Have a Dynamic Project Plan for Process Improvement

In this example, the use of an Excel spreadsheet captures the possible improvement ideas that exist for this production group. Please note that this is simply an example.

Create a Common Pool of Ideas

| Proj. # | Production Department Projects Project Description | Pri | Sta | Due Qtr | % Comp. | Project Leader |
|---------|---|-----|-----|---------|---------|----------------|
| PA2-01 | Employ quick changeover tools to reduce flavor, case, size, and label change times | A | I | 2 | 55 | Martin |
| PA3-02 | Investigate purchasing new star wheels and guides for the filler / plastic production | A | I | 3 | 20 | Jared |
| PA2-03 | Create / begin using setup sheets for line changeovers | A | I | 2 | 35 | Elmer |
| PA2-04 | Implement syrup process improvement team | A | I | 2 | 95 | Collin |
| PA3-05 | Define startup, shutdown, and operational procedures for all production jobs | A | I | 3 | 90 | Jared |
| PA2-06 | Install a production waste reduction plan and process | A | I | 2 | 65 | Kevin |
| PA3-07 | Create production skills training certification process | A | I | 3 | 75 | Kevin |
| PA3-08 | Develop and implement new packaging area layout | A | I | 3 | 85 | Mike |
| PA4-09 | Identify personal development plans / plant training plan | A | I | 4 | 35 | Kevin |
| PA2-10 | Improve the output and layout of the 50 ml production line | A | I | 2 | 75 | Baba |

The actual list is much longer. It includes both projects with a 'Hold' status (for future development) and projects that were dropped for one reason or another.

This example should help you better visualize the types of features that such a database would have should you choose

to use this approach in your workplace or organization. How do you capture the possible improvement ideas for each process?

- What are the advantages of using a common pool of ideas?
- How can people contribute ideas to the idea pool?
- Which groups should have access to the idea pool?

In a high performance workplace, every process owner can produce such a list for both the projects in queue, as well as those that have been implemented. The use of a central database helps keep all possible improvements together for the site or organization.

In turn, this enables leaders to more effectively allocate limited resources. Plus, it serves as a vehicle that lets each employee know what improvements are in-process or scheduled for future development.

Process-specific lists are posted in each work group's work area. Each work group member knows how to add ideas to the list if they think of one. Also, they recognize that they must do more than simply suggest an idea.

The design of the idea submission form requires the user to identify performance area impact, idea alignment with the organization's strategies, and rough project cost estimates. Plus, there is often expectation that idea submitters participate in the idea's development should it be selected for implementation.

Another key feature of this example is the "Percent Complete" column. The use of this column helps leaders and team members compare project lists over time. Plus, it helps them observe the degree of progress being made. This simple addition to the table helps process owners demonstrate project development skill proficiency and project leader accountability.

Who Needs to Practice NextGen Leader Standard Work?

This list of five leader (process owner) expectations represents what I personally expect when I lead a process work team. They are based on both my experience (successful and unsuccessful) with sustaining process improvement efforts. Plus, they reflect what I have consistently seen high performance organizations expect of their process owners.

You need to decide what is reasonable to expect of your process owners. What rate of change does it make sense to expect? What challenges might you have as you implement these expectations?

Who Needs to Change?



Every process owner must ...

- Spend more than 60% of their time with their people
- Track and trend key process metrics daily
- Know where key process hazards, errors, and defects exist
- Keep a running list of possible process improvements
- Eliminate existing job waste to make time for new tasks

Should personal change be optional?

The degree that a process improvement effort of any type can be sustained is highly dependent on the degree that you allow personal change to be optional. Do you only expect a small percentage of people to follow the above expectations (you allow process improvement to be optional)? If so, you have a relatively lower chance of sustaining your improvement initiative. Build process improvement expectations into EACH process owner’s job description and compensation plan. If you do so, your probability for sustained success will skyrocket!

One might wonder why I consider it so important to spend so much time with ‘your people.’ To begin with, keep in mind that I consider your people to be both your internal and your external customers. **If you don’t know what your customers expect, how can you ensure that your processes perform in a manner that meets those expectations?**

That said, I also know that many leaders spend 20% or less of their work time with their internal and external customers. Job design – how we learn from and satisfy customers as limited time and money is spent - is key to sustained process excellence! Leader Standard Work provides such a template.

In addition to gaining a better understanding of what your customers expect, spending time with them also gives you as a leader the opportunity to learn about process waste and possible process improvements that can be made to minimize that waste.

When you spend time with your internal customers, it allows you as a leader to coach and communicate changes and direction. More importantly, it creates a forum where you can listen to ideas, and most importantly, regularly recognize them for improvements they make. Every interaction with an internal customer is a chance to teach and learn!

E-mail: Kevin@greatsystems.com

**Snail mail: 70460 Walker Road
Rainier, OR 97048**

Phone: 206.226.8913

Website: www.greatsystems.com

Root Cause and Incident Analysis: www.taproot.com



@greatsystems



<https://www.facebook.com/greatsystems/>



<https://www.linkedin.com/in/kevin-mcmanus-5138322>

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Who Created This Content?

Hi! I'm Kevin McManus, and I serve as Chief Excellence Officer for Great Systems LLC. For the first half of my work career, I served as an Industrial Engineer, Training Manager, Production Manager, Plant Manager, and Director of Quality.

For more than 20 years, I've ran Great Systems LLC, while also teaching more than 440 courses as an international contract trainer for the TapRoot® root cause analysis process.



I hold an undergraduate degree in Industrial Engineering and an MBA. I served as a national Malcolm Baldrige Performance Excellence Award Examiner for twenty years, including a three-year term on the national Judge's Panel. For ten years, I served as a Regional Director and national Board member for the Association for Quality and Participation (AQP).

Plus, I write the monthly performance improvement column for *Industrial and Systems Engineer* magazine, I'm an Institute of Industrial and Systems Engineering Fellow, and I've been a member of IISE for over forty years. You can subscribe to my weekly Real Life Work podcast on feeds like Spotify and Google Podcasts. I hope to publish my newest book, "NextGen Leader Standard Work – the Key to Operational Excellence", in 2023.

Keep improving!

Kevin