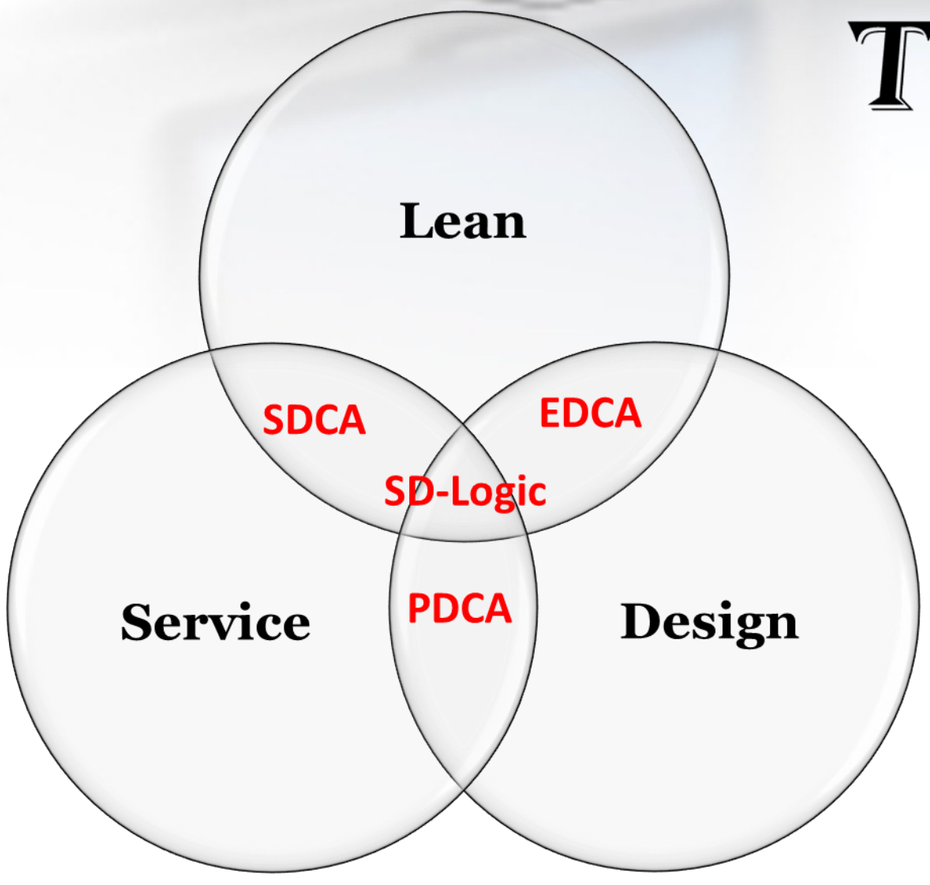
TRILOGY



LSDT Workbook
by Joe Dager, Business901

Lean Service Design Trilogy EDCA

	SALES	Explore	Do	Check	Act
Appreciative	Discovery: Identifying your positive core the best of "What is"	Dream: Images of shared visions on how service product will function. "What might be?"		Design: Align values, structures and process into the ideal. "What should be"	Destiny: Co-construct sustainable learning competencies "How to empower, learn & adjust/improvise?"
Focus	Design Strategy Create strategy as an experimental design by identifying truly critical factors and their interaction effects .	Charter Teams thru Policy Deployment Engage the entire team in conducting the experiment by formally chartering teams as needed.	Conduct the Experiment Transform Organization through Training Standardized work provides controlled conditions for execution of the experiment. Promote adherence through intensive training in teamwork and tools before initiating.	Check Progress in Real Time Empower your team to check results and make adjustments in real time. Manage exceptions through your Leader Standard Work .	Build collaborative structure Make new knowledge part of standardized work through PDCA embedded in daily operations.

Leadership Team (Value Stream Manger, Team Coordinator, Team Leader(s))

Sense Making

Identify the offering, the service product.

.Consider Possibilities

.Rank by impact

.Evaluate top ideas

.Define the Idea
- A. Golden Circle
- B. Uncommon Service
- C. Use other avail. tools (VOC, Kano, Matrix)

5. Point of View Statement
   - A. Define need
   - B. Define Value
     1. Functional
     2. Emotional
     3. Social

Analyze

Discover starting point.

.Experience economy hierarchy , where?

.Which iTeam?

.Journey Map
- A. Service periods
- B. Points of Concern
- C. User Perceptions
- D. Design Goals
- E. Constraints

Locate/Empower

Locate Team Members

.Name

.Position

.Role

Empower

.Develop initial Business Model Canvas

.Outline Strategic/Tactical Meetings
- A. Report
- B. Review
- C. Plan

Select

.Finalize plans

.Prepare for the cycle

.Introduce the tactical project plan

.Discuss the operations plan

.Study the plan

.Complete and confirm the EDCA plan

.Manage visually

.Weekly meetings

.Daily 5-minule meeting (if reqd.)

The people that are accountable for these must be part of this process.

Action Teams

What is?

.Regular work continues

.EDCA Plan = _____%

.Establish Gemba Walks

.Empathy Mapping

.Establish Customer Journey

.Develop User Stories

.Assess organizations ability to deliver.
- A. SWOT/SOAR Analyses

Action Teams

What if?

.Q-Storm

.Brainstorming for Future Journey Map

.Develop Multiple (7) Front & Back Stage interaction scenarios
- A. Functional
- B. Emotional
- C. Social
- D. Cost
- E. Others

What wows?

.Consider the top (7) Possibilities (Ideas)

.Define the best ideas, key steps.
- A. SOAR, SWOT, Kano
- B. Deadline
- C. Customer use
- E. Customer need
- F. Others

.Rank by impact

.Prototype top 3 ideas

What works?

1. Build a set of Leading Measures identified by
   - A. Small Outcomes
   - B. Leveraged Behaviors
2. Develop a system for
   - A. Accountability
   - B. Discipline
   - C. Awareness — Line of Sight
   - D. Clear the Path
3. Meet w/Leadership
   - A. Prepare for review
   - C. Analyze and score Development
   - D. Recognize Achievement
   - E. Review BMCanvas

.Select best idea and move to PDCA

Consultants Role

60 minute webinar introduction to Lean Service Design Trilogy

1 to 2 day workshop

1 day Launch workshop

1/2 Day What's Next Workshop

Off Site Support for development of plan in first 30 days.

Provide weekly Instruction/coaching in accordance to plan outline

Hoshin Kanri for the Lean Enterprise by Thomas Jackson , Appreciative Inquiry for Change Management by Sara Lewis, Designing for Growth by Jeanne Liedtka and Tim Ogilvie, Business Model Generation by Alex Osterwalder

http://Business901.com

Identification of the service product is the first step for creating a Lean Service Design.

Use this worksheet to identify Service Products. You will:
1. Name the service/product groups of your department/organization:
2. Narrow that number to seven that you are most familiar with or create yourself.

After completing worksheet, check your work: Do you answer yes to the following questions?

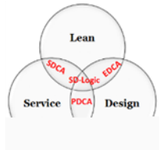
This exercise is derived from the book Creating a Customer-Centered Culture, and the following is the author's explanation on how to check your work. If you answer yes to any of the following, you have not created a service product.

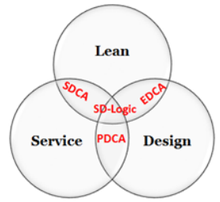
Is these Service Products (SP) something only you or your immediate work group can claim as yours? For example, a service product name of policy or plan isn't specific enough to claim ownership. Such labels represent whole classes of service products (SP). There are probably others who would also claim these SP as theirs.

Can you make the SP plural? If the label you wrote is followed by "—ing," it is an activity, not a SP product. The SP is the tangible deliverable that is created by activity. Results like satisfaction, assurance, and security also are not service products. They are outcomes (intangible results or conditions) obtained by using the SP.

Does the SP, as named, occur in countable units? Information can only be considered as a SP by the various forms it takes. Reports, graphs, answers, proposals, plans, and manuals are examples of information products. Information is raw material, delivered to others in some organized or packaged form.

Is the Service Product intended to mate a desired outcome or result for a customer? Satisfaction, security, fun, profit, productivity, and knowledge are outcomes your SP might create. Some people confuse outcomes with the SP itself. Direction and leadership are sometimes used by leaders of the organization. The true SP are policies, plans, and strategies which, when used by others, propel the organization in a desired direction. These types of SP are more complicated than the others, and for the moment I would stay away from using them. Leadership is a skill or outcome, not a SP.





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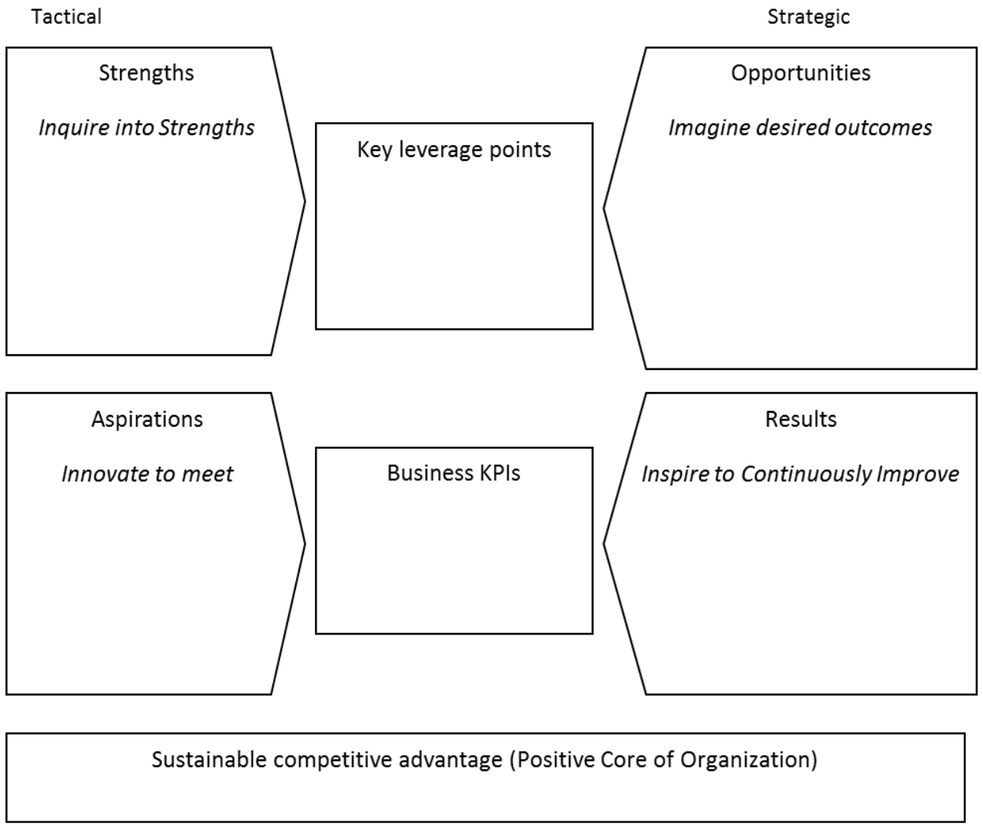
Painting the Vision (SOAR)
(Strength, Opportunities, Aspirations, Results)



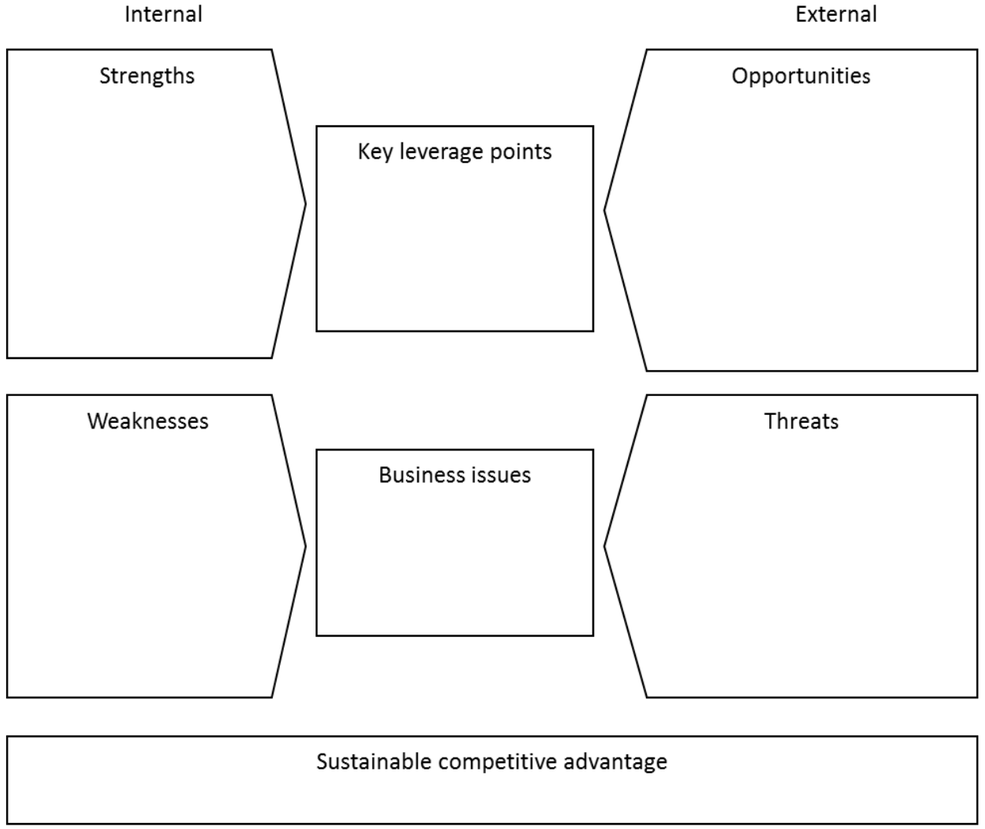
Strengths:	Internal to organization;	What is our core
Opportunities:	External to organization;	What might be
Aspirations:	Internal to organization;	What should be
Results:	External to organization;	What will be

Key Leverage Points:
Opportunities we can leverage our strengths against (where we play and win)

Business KPIs:
Key Performance Indicators that we can measure over extended period of time

SOAR is a great method to use for expanding on the positive areas of an organization. It normally is much easier to gain buy-in from stakeholders with this approach versus others.

SWOT Form



Strengths:	Internal to organization;	Things we do better
Weaknesses:	Internal to organization;	Things we do worse
Opportunities:	External to organization;	Things to capitalize on
Threats:	External to organization;	Things to worry about

Key Leverage Points:
Opportunities we can leverage our strengths against (where play to win)

Business Implications:
Threats our weaknesses make us vulnerable to (where play not to lose)

Sustainable Competitive Advantages:
Key leverage points that can be sustained over extended period of time

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	Pre-Service		Service		Post-Service	
	Access	Engage	Customize	Connect	Collaborate	Advocate
Touchpoint						
Functional						
Emotional						
Social						
Front Stage						
Back Stage						
Support/Resources/ Budget						

SALES PDCA CANVAS

Team Name: **Sales Cycle ID:**

S: Select the initial Problem Perception

What is the problem to be solved? Describe the problem, issue or need that your project is intended to address.

A: Analyze the current process

Review the Critical to Quality (CTQ) issues facing this value stream and how they apply to this cycle. What should be involved in this step? Have customers' expectations and specifications been examined and documented? What are the points of concern?

L: Locate the people who understand the process

List the members of your team, including position and role they will play.

Name	Position	Role

E: Empower the Team

The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team (Team Charter) to accomplish process.

S: Select the Improvement

The team must fully understand not only the CTQ's of the overall Value Stream but the CTQ's of this particular cycle. Define the Gap that is to be completed in this cycle.

P: Plan

What are the detailed steps you will take to make an improvement?
Clarify the problem, breaking down customer decision process and people involve.
Locate the point of concern or cause through Who, What, Where, When
Identify root cause and verify with data.
Develop countermeasures utilizing user stories and place on Kanban board, prioritize.

D: Do the plan

Build Project Plan or iteration through user stories. Use a Kanban board to visualize work flow and who is doing what. Pull tasks into doing as needed. Use daily stand-ups or Andon to signify problems or hang-ups.

C: Check (Study) to see if an improvement was made

Did the plan work? Collect and analyze data to demonstrate if gap was closed or not. Determine which changes worked and which did not.

A: Act (Adjust)

Has Gap been closed? Has Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer can be handed off to next stage.. Document the steps that will be taken to for this and complete hand off.

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PDCA

	Plan (30 Days)	Do	Check	Act
Appreciative	Discovery: Identifying your positive core the best of "What is"	Dream: Images of shared visions on how group will function. "What might be?"	Design: Align values, structures and process into the ideal. "What should be"	Destiny: Co-construct sustainable learning competencies "How to empower, learn & adjust/improvise?"
	Design Strategy Charter Teams thru Policy Deployment	Conduct the Experiment Transform Organization through Training	Check Progress in Real Time	Prioritize Standard Work
Focus	Create strategy as an experimental design by identifying truly critical factors and their interaction effects . Engage the entire team in conducting the experiment by formally chartering teams as needed.	Standardized work provides controlled conditions for execution of the experiment. Promote adherence through intensive training in productivity and quality methods before initiating.	Empower your team to check results and make adjustments in real time. Manage exceptions through your operating system.	Make new knowledge part of standardized work through PDCA embedded in daily operations. Coach and mentor to develop leaders at every level.
Leadership Team	Team Leader & Operational Teams	Action Teams Team Leader	Action Teams	
	Define one or two specific goals that would make a difference in 90 to 120 days. .Consider Possibilities .Rank by impact .Evaluate top ideas .Define the Idea A. Current Result B. Desired Result C. Deadline D. Rank	Build a set of Leading Measures identified by A. Small Outcomes B. Leveraged Behaviors .Consider Possibilities .Rank by impact .Test top ideas .Define the best ideas, key steps. A. Current Result B. Desired Result C. Deadline D. Rank The people that are accountable for these must be part of this process.	Make it Visible .Choose a theme for keeping score: Pie/Bar Chart, Speedometer, Andon, .Create a simple design .Assign responsibility for updates .Locate online/offline but visible	Outline Weekly Meetings .Report .Review .Plan **Team Leader** .Finalize plans .Prepare for the meeting .Introduce the tactical project plan .Discuss the operations plan .Charter operations teams .Study the plan .Complete and confirm the operations plan	.Regular work continues .Hoshin Plan = 10% .Act on Lead Measures A. Accountability B. Discipline C. Awareness — Line of Sight D. Clear the Path for others	Develop leaders who can teach •Apprenticeship •Kaizen Note: Teams at all levels participate in leadership development, but responsibility lies with the team leader. Becoming lean cannot be delegated.	1. Manage visually A. Visual project 2. Conduct review meetings Daily 5-minule meeting (if reqd.) Weekly Monthly Quarterly Annual .Conduct president's diagnosis Self diagnose Prepare for diagnosis Site visits Analyze and score development Recognize achievement	.Promote adherence to standardized work .Develop leaders and make succession plans .Train, coach, and mentor .Repeat the cycle
Consultants Role	90 Minute Introduction to Lean Sales and Marketing 1 to 2 day workshop 1/2 Day What's Next Workshop Off Site Support for development of plan in first 30 days. weekly Instruction/coaching in accordance to 90 Day plan outline					1/2 day Launch workshop		Provide

Training Material developed from 4 Disciplines of Execution by Franklin Covey, Hoshin Kanri for the Lean Enterprise by Thomas Jackson and Appreciative Inquiry for Change Management by Sara Lewis.

Sample Improvement Cycle

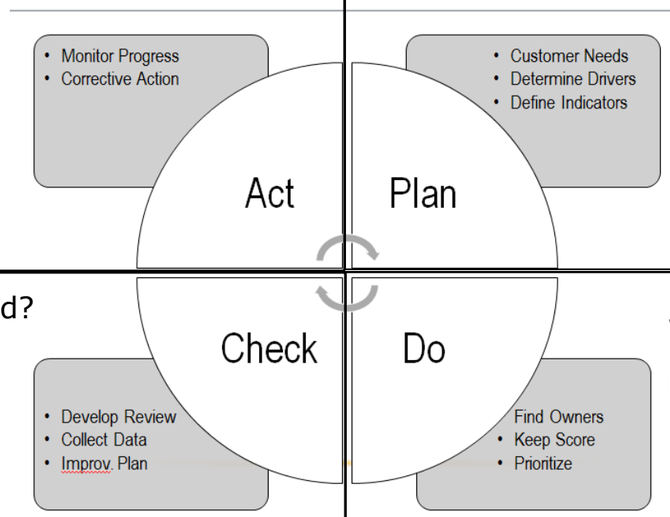
How will we know it was successful and for whom?

What are the new measures of success?

What is low cost, low investment, low risk way to try out a solution?

What can we do __ weeks?

What will we learn?



What key questions do we need to ask and answered?

How will we gather and capture the data?

What resources will we need?

People, Time, Money, Skill?

SALES SDCA CANVAS

Team Name: **Sales Cycle ID:**

S: State the standard

Standard work is the best practice for a given process. It should provide a routine for consistent delivery of work and to do this it must be stated dearly and provide a clear line of sight to the Value Stream Manager, Team Coordinator and Team Members.

A: Agree on the method.

What is the method you are going to use for the documentation of standard work. It will provides the necessary components of a reporting system that ensures the work is being done as expected. What are you currently doing?

L: Locate the people who will be on the team.

List the members of your team, including position and role they will play.

Name	Position	Role

E: Empower the Team

The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team to accomplish process.

S: Select the Team Goals of the Project

The team must fully understand the exact goals and outcomes that are expected for this particular cycle.

P: Standard

Review the method.
Document the actions needed and who will complete each action step.
Clarify the resources needed for each action step.
Decide on what constitutes variation and required action.

D: Do the plan

Perform to the standard. Use a Kanban board or other means of visualization to demonstrate work flow and problems encountered.

C: Check (Study) to see if an improvement was made

Did the plan work? Collect and analyze data to demonstrate if standard was done. Determine what changes are needed for improvement.

A: Act (Adjust)

Is the standard being completed. Has Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer can be handed off to next stage/cycle Document the steps that will be taken to for this and complete hand off.

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Name:	Team Member Standard Work																Team:															
Date:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Time Commitment(%)																															
On Team Activities																															
Non-Team Activities																															
Training																															
Project Goal (% Not Done or Y/N)																															
A1-																															
R1-																															
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Events	
Brilliant Ideas (not actionable)	
Discussions (Includes Training needed)	

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Team Leader Name:									Standard Work									Team Coordinator Name:													
Date:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Time Commitment(%)																															
On Team Activities																															
Non-Team Activities																															
Training																															
Resources Required (y/n)																															
Team Member #1:																															
R1-																															
R1-																															
A1-																															
Team Member #2																															
R2-																															
R2-																															
A2-																															
Team Member #3																															
R3-																															
R3-																															
A3-																															
Team Member #4																															
R4-																															
R4-																															
A4-																															
Events																															
Brilliant Ideas (not actionable)																															
Discussions (Includes Training needed)																															

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Name:				Value Stream Manager Standard Work								
Week #	1	2	3	4	5	6	7	8	9	10	11	12
Team #1 Status												
Project Goals (% not Done)												
Resources (% Missing)												
Team activities (% on non-time)												
A1-												
Relevant Events												
Relevant Brilliance												
Relevant Discussions (Training)												
Team #2 Status												
Project Goals (% not Done)												
Resources (% Missing)												
Team activities (% on non-time)												
A2-												
Relevant Events												
Relevant Brilliance												
Relevant Discussions (Training)												
Team #3 Status												
Project Goals (% not Done)												
Resources (% Missing)												
Team activities (% on non-time)												
A3-												
Relevant Events												
Relevant Brilliance												
Relevant Discussions (Training)												
Team Coordinator												
Project Goals (% not Done)												
Resources (% Missing)												
Team activities (% on non-time)												
A1-												
Relevant Events												
Relevant Brilliance												
Relevant Discussions (Training)												

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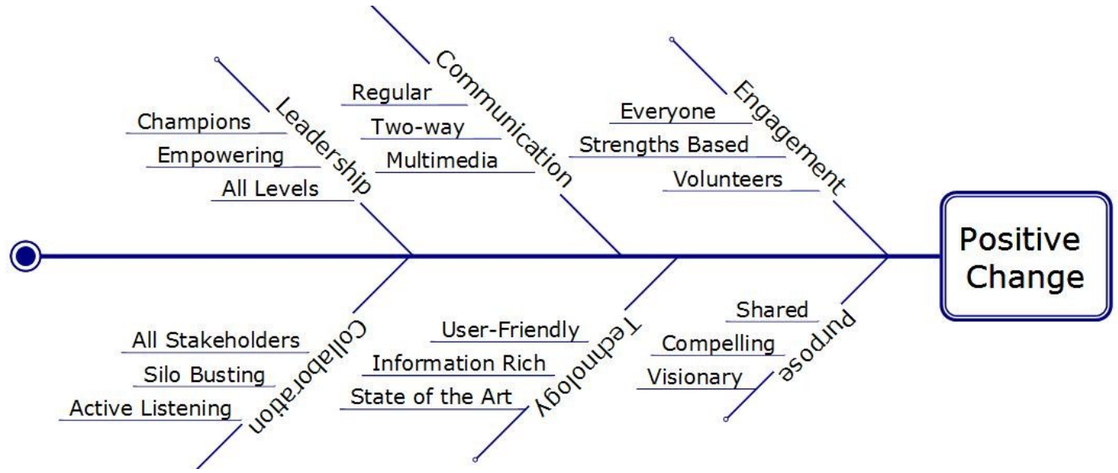
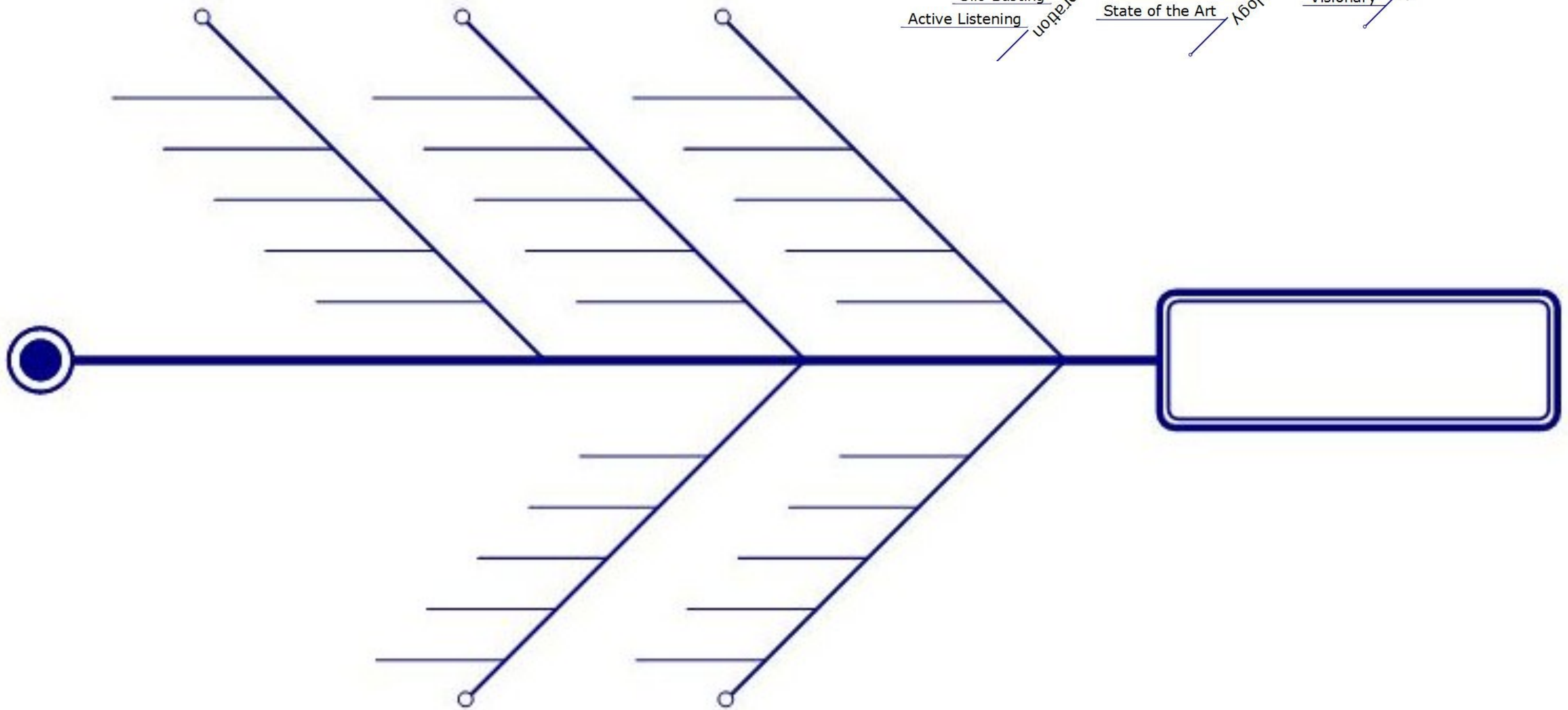
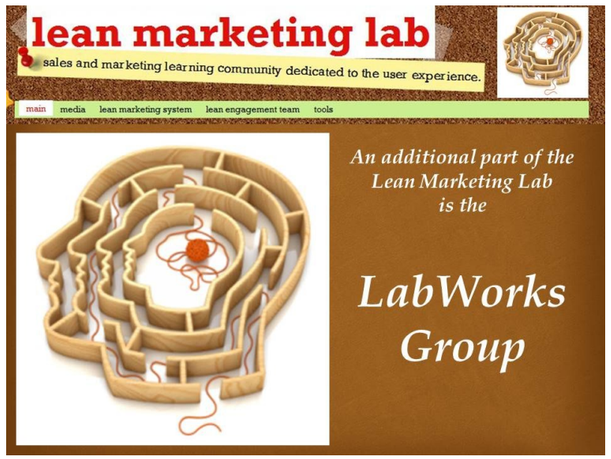
Root Cause Analysis of Success







Lean marketing lab

Sales and marketing learning community dedicated to the user experience.

You can't write and teach Lean Sales and Marketing. It is a **Learn by doing** approach. It is choose one problem and solve one problem. What we can do is provide you a platform through the recommended books and tools, teach them and incorporate feedback as you put them into practice.

Being part of this community will allow you to interact with like minded individuals and organizations, purchase related tools, use some free ones and receive feedback from your peers. There is no cost to join the site and participate in the discussions. There is a separate paid section described below for added services.

What makes Lean Sales and Marketing different is the system.
The steps of Lean S & M are first you go and see the initial practice, the user. Second, you form a working vision from the user experience, an ideal situation of where the user wants to go. Third, you visualize the user's process. If you do that, it's obvious to see what your next reaction should be and when to trigger it.

We introduce the tools into the process very early through the books, PDFs and Word and Excel documents. It is a form of self-study and exercises to understand your processes better. They are a way to look at problems, not solve problems. Many people buy the latest software, the latest book or even the latest methodology to implement some sort of solution, thinking it will make them better. What makes you better is using the tool rigorously, so you understand your problems and your own processes and then with hard work, take the time to figure out how to solve your problems. It's this process, that empowers you and which leads you to create better and more performing processes.

Lean is a journey. As my friend Dr. Michael Balle says,
"Lean is not a revolution; it is solve one thing and prove one thing."

I look forward to your participation in the Lean Marketing Lab!
- Joe Dager, Business901.