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Podcast Transcription

Implementing Lean Marketing Systems



Strength Based approach to Lean and Six Sigma

Guest was David Shaked



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David Shaked established [Almond Insight](#) in 2008. They work with organizations to help them change for the better. Almond Insight is different from other "change managers". They involve and inspire people so they become more engaged and support what needs to change. This way, they ensure a positive outcome both to those involved and to the organization.



With over twelve year's practical experience, he has a strong track record with organizations such as Johnson & Johnson, Intel, 3M and IBM. He has worked all across Europe, the USA and the Middle East and his experience includes working with individuals and groups at all levels.

His expertise lies in applying improvement tools in a practical and approachable way to solve business challenges in sales, marketing, finance, customer services, distribution and human resources.

He holds a Bachelor degree in Accounting and Economics from the Hebrew University of Jerusalem and an MBA from the Red McCombs School of Business at the University of Texas-Austin. He is a certified Master Black Belt and is about to become a certified Appreciative Inquiry Practitioner by NTL.

Following is a Transcription of the Podcast

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Joe Dager: Welcome everyone; this is Joe Dager, the host of Business901 podcast. With me today is David Shaked of Almond Insight. David is an experience organizational change and business improvement leader with multinational corporations. An innovator in the application of Strength-Based approaches to change through Appreciative Inquiry, Lean, and Six Sigma. David, could you give me a quick introduction of yourself?

David Shaked: Thank you, first of all for having for me. My name is David Shaked and I started my own business, Almond Insight, about five years ago. Almond Insight is basically my consultancy and I work with partners, as well. The purpose of setting it up is to do what I call Strength-Based Lean Six Sigma. Which, I'm sure we'll talk about later. I've combined everything that I've accumulated in terms of tools and approaches, ways of thinking and the work that I do into one company, one business that I can refer to and promote.

Joe: Talking about the Strength-Based approach. I have to first ask you, how did you start? Did you start as a Lean Six Sigma guy, or did you start as an Appreciative Inquiry person first?

David: I started very much in the world of Lean Six Sigma, or even beforehand Process Improvement, Process Re-Engineering. That's been most of my experience up to the point where I've discovered A.I. I had more than 10 years of working in Lean Six Sigma and the last eight years were with a big corporation, Johnson & Johnson. I was a Master Black Belt there, which is quite a scary title. My focus was very much in the transactional area of Lean Six Sigma, anything that is outside of manufacturing. Primarily it was in sales and

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marketing, improving sales process, marketing processes, a little bit on the other support functions like HR, IT, and finance.

Also, I've done a little work on the distribution side. How you take customer orders and make sure they arrive to the customer.

Joe: When you worked in transactional processes, did you work improving a certain process in sales and marketing, such as a call center and improving that process? Is that how you applied Lean Six Sigma in that area?

David: Absolutely. Also, improving the work those sales reps did on the ground, or the marketing that we do with customers, because a lot of the sales we did in Johnson & Johnson was face to face rather than online or through phone orders. I've done a lot of work with sales reps, with sales managers, looking at the processes that they use. A lot of these processes are human based, based on conversations, interactions. They're not as automated or standardized as, say, some of the more automated, online processes. I've done some of them, as well.

Joe: Could you pick an area and tell me how you applied Six Sigma to sales and marketing?

David: I can tell you about the very first green belt project I did, which was actually quite innovative at the time. I started with it when Six Sigma was very much associated with manufacturing. My job, when I joined Johnson & Johnson was actually to introduce Six Sigma anywhere outside the manufacturing side, and primarily in sales. The very first project was to analyze what makes a good sales call, or a sales visit with a customer. How

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to increase the ratio or the success rates of sales calls. So, we did the whole DMAIC cycle there, define, measure, analyze, all of that, and achieved some very interesting conclusions of what makes a good sales call, what preparations is needed.

Also, because we were looking at defects at the time, so, more analyzing what prevents a sales call from being a good sales call? Looked at, where did we go wrong in terms of the sales call itself. A lot of it was about the targeting. Who do we target for the sales call, and why do we target them? What message are we going to communicate to them?

Joe: How did the sales and marketing people react, initially, to a Six Sigma guy and a Master Black Belt coming in there to improve their process?

David: Suspiciously, the biggest challenge at the time, looking back, I've done a good job in that is translating the language, because the language of Six Sigma is not natural to a lot of sales and marketing people. It's actually taking the language and some of the tools. A lot of sales people believe that it's only about relationships and it's an art. You either have it or not. A lot of it is true, but even the greatest artists in the world still have to mix their paints correctly and there's a lot of science in that, and set up the light and everything else that comes into great paintings before they apply their artistic side.

Joe: You think about standard work a lot of times when you think about Lean. Can standard work be applied to the sales and marketing arena?

David: It can be, to a certain degree. At the end of the day, it is a human interaction. It is a conversation, so there's very little you can actually control there. But in terms of your preparation, you can definitely standardize it, or standardize the process you're going

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through. You can standardize some of the questions you might ask, some of the content, some of the information that you have about the customer and about the products you're trying to sell. You can standardize your response to the sales call itself. There are a lot of things you can standardize. Then you realize that, to be honest, there's no such thing as Six Sigma in these processes, and you're just better off moving from half a sigma to a sigma. You're already making a big difference.

Joe: That's what a lot of people don't realize. I always talk about just using the basic seven quality tools will get you to three sigma, five sigma, probably. That's plenty for sales and marketing.

David: Absolutely. There's so much variation there, and it's not so much about reducing that variation, because you actually want that richness of conversation. But you want to standardize what you can standardize, and really base it on the best practices, rather than analyzing what the defects are.

Joe: Did you find something lacking in Lean and Six Sigma in the transactional processes?

David: I don't think it was lacking in anything. I got good results and I have huge respect for Lean and Six Sigma. I've used it for so long, and it wasn't lacking. The only thing that I did notice after a while is that, A, you cannot apply it in every situation, and B, a lot of the stuff becomes repetitive. I would solve a problem in one area, but it would generate another problem elsewhere. Or, I would solve a problem in one area and then, I would see the exact same problem in a different area. It became a bit repetitive after a while, and that's what kicked me towards discovering what else is out there in terms of driving change in organizations.

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Joe: Is that what brought you to Appreciative Inquiry, first?

David: It did. It was a journey of discovery, but I saw myself as a change leader, as someone who leads change into individuals in teams, or in whole organizations. Once I realized that's who I am, I let go of the attachment to Lean and Six Sigma and allowed other things, and one of them was AI. I went to a workshop about AI. That was six years ago, so not too long, and that was a fabulous experience. Very deep, very interesting, very powerful, as well in terms of the insights I got out of it. At the same time, it really clashed with everything that I knew from the world of Lean and Six Sigma.

Joe: Well, it seems like Lean and Six Sigma is driven by problem solving and looking for problems, and Appreciative Inquiry is saying, "No, no, no!" "Let's look at the good things." What do they have in common?

David: They actually do have a lot in common. In the journey, that I went with AI and then, later on with other Strength-Based tools, it took me a while to be able to merge the two things. But what they do have in common is the desire for improvement. Also, if you look at some of the principles of Lean, for example, or the mission that is behind Six Sigma, the principles in Lean would like to see flow. You would like to see value to customer. You'd like to see pull versus push. You'd like to see continuous improvement, and Six Sigma is all about quality. All of these things that I've just said are very positive.

They're not in complete misalignment with AI. AI is also very positive oriented. What confused me initially and what might confuse others is the language we use, or the ways we use, the approaches we use to get there. In Lean Six Sigma, I would actually analyze the defects or the wastes in order to get to value and quality.

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Whereas in AI, I would actually look at where are we already creating value or where do we already have some quality? Then, build on that. If you actually look at the end result of what we are trying to drive, you'll see that they're very much aligned. It's only the road we take to getting there, which is different.

Joe: I relate that a somewhat to the Shainin methodology, which isn't practiced very often, but it's taken these positive things, and you don't address a lot of those Xs. You narrow things down by working with the Ys of what you want for the outcomes. Is that an approach similar to how you blend AI and Lean and Six Sigma?

David: It is. The way I blend it is very different for each situation. There are many ways to do that. Some of it is more about the thinking, the end result, what it is that we are trying to achieve here, and therefore let's focus on where it already exists. In other cases it's just using the old familiar tools that we know, but applying AI thinking to them.

Joe: Can you expand on one of the ways that you integrate the two?

David: AI is really a whole organizational, whole system approach, which is by the way, very aligned with Lean. So Lean would look at the whole organization, our whole process, rather than chunks of it. How I blend it depends on the situation. For example, if you work with a whole organization, you can start with setting up a vision of quality and efficiency, using pure AI and then implementing that with either classic Lean Six Sigma, or the Strength-Based approach, which is what I'm doing. Either way you do it, you are driving towards a vision that is shared by everyone and is engaging with everyone, because you've done it through an AI process.

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Now, the vision of quality and efficiency that you're creating can be part of a bigger strategic plan, for example. We don't necessarily have to focus just on quality and efficiency, but quality and efficiency are ways to get to something else.

That was on a whole organizational level. There may be a project or a Kaizen event where you can also apply that thinking. You can use it in specific tools, for example. I often do process maps with Strength-Based thinking, or something I call a wishbone analysis, which is obviously based on the fish-bone analysis.

I also do the seven signs of value, which is a tool that I've created based on the seven wastes. Lots of different ways, it really depends on the situation, but what it enabled me is the huge freedom to play with Lean Six Sigma and be creative with it.

Joe: Why would I want to combine the two? What's the advantage?

David: For me, primarily, the first thing is, what AI brings to the play is creativity, energy, innovation, and huge engagement. People always love to talk about their best experiences, the successes they had, the knowledge they already have. That's a huge contribution that AI gives. Lean Six Sigma obviously brings the methodical way of working at situations. If you combine the two of them, you're actually creating a brilliant way of solving business problems, organizational challenges, process issues, in a much more engaging and creative way. I still remember when I practiced classically, Lean Six Sigma. Once you start that conversation about wastes, you're creating a threat and you get a lot of people who are disengaged with it.

Even if I try to blame someone else, or the people who designed the process originally, I

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still create some sort of a threat for people. It's not intentional, but just the language that is used, "wastes," or "defects," it's already threatening to anyone I engage with. They close down, and the creativity is not as great as it can be with AI.

Joe: I had a Master Black Belt when I mentioned about the AI and combined it with Lean and Six Sigma and came back and said, "Oh, it's just like playing soccer and not keeping score. It's just a feel-good type thing and everything." How would you answer someone like that?

David: I get that a lot. A good Lean Six Sigma resource would be a belt or sensei or whatever it is, and I was just like that so, I'm not saying it's any different than what I was a few years ago. Lean Six Sigma people think in a way of let's find what's wasteful about anything that is in front of us, or let's find what is defective about it. When you introduce AI to a Lean Six Sigma person you would get them asking, immediately questioning what's wrong about it, rather than trying to play with the possibilities. That's the first thing. The best way to introduce it to an organization that is really keen on Lean Six Sigma is you can just as well build on what you already know and already do and just add that extra magic and energy of AI.

It's not contradicting in any way it's not a threat it's actually helping the Lean Six Sigma journey get to a better level in my view.

Joe: David, could you expand on the seven signs of value and what you were trying to accomplish with it?

David: This is one of the things that I learned from AI. AI really emphasizes that what

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you ask, you get more of. If you start asking questions about wastes and trying to look for wastes in your system, you will find more waste and you will possibly even create new waste. I've used the seven wastes, or eight wastes, or there are so many versions of the tool, seven wastes so many different situations in the past. Once I embarked on the journey of AI I actually realized, wait a minute, am I actually setting myself up for failure? Am I creating more waste by asking about the waste and trying to look for it?

That led me to this train of thought which led to why don't we actually look for where is the value? In all of the Kaizen events and everything that I have done in Lean, we very rarely looked at the value. Even when we identify where value is created we actually never even inquired how come we do it or what enables all that.

I started thinking about where is value created and how would I know that I'm creating value and that's what led me to these seven signs of value. Which in a way it's the flipside of the seven wastes but because you started asking about them, you're generating more value. In a way, the opposite of defects which is one of the wastes, would be perfect outcomes.

Where in my process am I actually creating perfect outcomes? If you're talking about excessive movement, where in my process are things placed in a way that don't require that movement, that they are so close to each other that you don't need to move things around.

All of these seven wastes can be translated. I actually wrote an article about it, which is available to anyone who wants it, which specifies these seven signs of value. How to look for value and how to find it? The conversations you're having as you discovered more and

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more value, it's a great conversation, it's motivating, it's engaging, and it gives people more idea on where else can they create value. Which is really what we're after when we're talking about Lean?

Joe: That's so well said, because we don't go after what value we're creating so often. We're always looking for the non-value instead of promoting the value and that is the Strength-Based approach isn't it?

David: It is. I use a common metaphor if you like for that and I explain to people, it is like making a cake. Imagine your operations, that process in front of you as a cake. The Lean thinking way or the Six Sigma way would be, let's look at this cake and find the tasteless part or the things we used too much of in preparing the cake. I would look for what's not tasty, what's not useful, did I use too much flour in the process of making the cake and all of that, and by this process I will start removing things from my cake and who knows I might actually leave it with holes.

Whereas, in my Strength-Based approach, when you apply the Strength-Based process or thinking to the cake, you will think well what's really good about this cake? What are the tasty bits and how can I make an even tastier cake based on what I know that makes cakes tasty? I would find the raisins or the strawberries or whatever it is I have on my cake and find how do I do more of that rather than focusing on where did I waste stuff?

Joe: The Ben and Jerry's approach to ice cream. I don't know if you're familiar with Ben and Jerry or not.

David: Absolutely and I love it.

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Joe: Do you think in the transactional process and more specifically, in the sales and marketing process, do they lend themselves to attaching themselves to this type of improvement over, Lean and Six Sigma by themselves?

David: Absolutely. It is the easiest space to play with. First of all, as I said sales and marketing are very much human interaction-based to a very large degree. It's hard to automate them and it's a lot easier to think of them as conversations. That's in immediate alignment with Strength-Based thinking. Also sales people and marketing people tend to, I don't want to generalize, but they tend to like talking about their successes and the best features of their products and the highlights rather than their failures, defects, wastes.

In a way, the language that I'm using when I use Strength-Based approach to Lean Six Sigma is very natural to the language that is used in sales and marketing and that already makes it a lot more accessible.

Joe: What has been some of your positive outcomes of using this approach?

David: The best outcomes were amazing ideas that came up and a complete way of thinking about the problems. Some people think that AI is ignoring problems, so it is important for me to say AI is not ignoring problems. It's actually solving this problem in another way. The same goes for Strength-Based Lean Six Sigma. The successes I've had is, I've had a wonderful Kaizen event that went incredibly well and generated ideas that were never thought about in the organizations beforehand. I've had a piece of work with an Internet service provider that created a huge, completely different way of thinking about customer complaints. They were looking at how to minimize the customer complaints they had.

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Typically, what you notice immediately is the creativity. Creativity and later on what you see also is the energy for implementation. You get people really excited to implement what they thought about, which was something that I always had to push and motivate afterwards, when I used to do the classic Lean Six Sigma.

Joe: I'm going to put you on the spot here. I'm a company. I'm a Lean Six Sigma company. I say, "OK, I want some help from you on how to shorten my sale cycle." How would you approach that person?

David: In my Strength-Based approach, first of all, I would find more about the situation. Because typically what you would find is, they would look at an average score. Within that average you would find people who actually have a very short sales cycle and a very long sale cycle. I would immediately look at who has a very short sales cycle. What enables that? Who's involved? What are they doing that is correct and efficient and helps them close the sales more efficiently. That would give me a completely different view of shortening a sale cycle, than if I went after those who have the longer sale cycle and look at what's causing the waste or slowing them down.

Joe: Is this the main thrust of Almond Insight, the Strength-Based approach is this what you do there?

David: It is very much so, and I'd like to see myself as having started a movement in terms of Strength-Based Lean Six Sigma because it is a movement now, there are other people that are active and involved and my business is very much dedicated to that. It's to driving a different way of thinking about our processes; getting to the same results, quality, flow, value to customers. We're still committed to that. How do you do it in a way

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that is not scary, stressful, threatening in anyway? I know it wasn't the original intent of Lean thinking. Right now, you hear a lot of talk about removing waste and that's associated with losing jobs. It's not really healthy. It's not healthy to people or their organizations.

Joe: I paint this scenario and this is my own personal thoughts here. Making things better, faster, cheaper, is a tough process to build on anymore. That's why you're seeing the movement towards innovation. Innovation is driving successful companies. Better, faster, cheaper, that process mythology of the '90s and the early 2000s, you can only do that for a short time period because someone catches up right away.

David: We're seeing it now in China as well. Even someone else is catching up with China now. Whereas, China used to do things cheaper, better, faster, they can't compete now with their competitors. We are shifting to a very different way of operating and it is about this paradigm shift of moving from the technical look of the world to a more human based and innovative way.

Joe: That's where that Strength-Based plays into it a lot, but there's one other thing that I want to mention that was on another podcast of mine, that I think fits into this is, they say that you can't be good at everything. In traditional Lean Six Sigma world, you're always trying to be excellent at everything and that's really tough to do from a budget, from a man-power, from a customer viewpoint, everything. The Strength-Based seems to play into this that you really concentrate on what is the most important thing to your customer and what you do from the positive standpoint rather than just looking at the negative.

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David: In the Lean Six Sigma world, we say between five and 30 percent of the process is generating value, the rest is waste. We focus so much on the waste, and we forget that we actually are generating value. If I actually, focus on the five percent, on the real positive core of my operation and my process, I can find ways of expanding those five percent to possibly 10 percent, to 20 percent and who knows how far I can get, but it will get me a lot farther than trying to squeeze those 70 percent.

Joe: You have a LinkedIn group on Strength-Based Lean Six Sigma?

David: Yes, that's something that I started about three years ago. It's a group on LinkedIn called Strength-Based Lean Six Sigma. It was a way to connect to people and start spreading the idea and start this movement that I call the Strength-Based approach to Lean Six Sigma. The group is very active there are about 400 members now, and it's growing regularly and it's really satisfying to see it. I have some very active members from around the world. Anywhere from Australia to Europe, to the US, to South America, I have lots of members there and the conversations are fantastic.

For me it is a tool to A, create a profile for the topic and this unique approach and also to connect with people and share stories. I post all my knowledge there and questions if we have and we help each other. It's a very nice group and very active, as well.

Joe: Is there something that you would like to add to this conversation that maybe I didn't ask?

David: I can tell you about the public speaking that I do on this topic so if that's of interest. I speak about this topic in conferences or within organizations depending on the

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interest. I'm going to deliver a couple of workshops in Toronto in June. If people are interested then, they can get in touch with me and I can give them the details. I'm also actually working on a book on this topic which I hope to launch later on this year and it's pretty much laying the possibilities and the connections between classic Lean Six Sigma and all the Strength-Based approaches.

By the way, there are also other approaches that I use. It's not just AI. I also use something called solution focus, positive deviants, and couple of tools from the strength movement and positive psychology. There's a lot that goes into Strength-Based Lean Six Sigma but they're all enabling the exact same results we want to see in the classic world of Lean Six Sigma.

Joe: What's the best way for someone to contact you?

David: They can get me online through LinkedIn David Shaked or they can email me to david@almond-Insight.com and they can call me of course. There's lots of ways to get in touch. They can also join the LinkedIn group that I mentioned, which is named Strength-Based Lean Six Sigma.

Joe: What's your website again?

David: My website is www.almond-Insight.com

Joe: I'd like to thank you very much, David. I appreciate the time and you had some wonderful ideas on Strength-Based Lean Six Sigma. Thank you again.

David: Thank you very much Joe and thank you for the opportunity to do this podcast.

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What others say: *In the past 20 years, Joe and I have collaborated on many difficult issues. Joe's ability to combine his expertise with "out of the box" thinking is unsurpassed. He has always delivered quickly, cost effectively and with ingenuity. A brilliant mind that is always a pleasure to work with." James R.*

Joe Dager is President of Business901, a progressive company providing direction in areas **such as Lean Marketing, Product Marketing, Product Launches and Re-Launches. As a Lean Six Sigma Black Belt**, Business901 provides and implements marketing, project and performance planning methodologies in small businesses. The simplicity of a single flexible model will create clarity for your staff and as a result better execution. My goal is to allow you spend your time on the **need versus the plan.**

An example of how we may work: Business901 could start with a consulting style utilizing an individual from your organization or a virtual assistance that is well versed in our principles. We have **capabilities to plug virtually any marketing function** into your process immediately. As proficiencies develop, Business901 moves into a coach's role supporting the process as needed. The goal of implementing a system is that the processes will become a habit and not an event.

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