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Podcast Transcription

Implementing Lean Marketing Systems



Blending Appreciative Inquiry and Continuous Improvement

Guest was Ankit Patel



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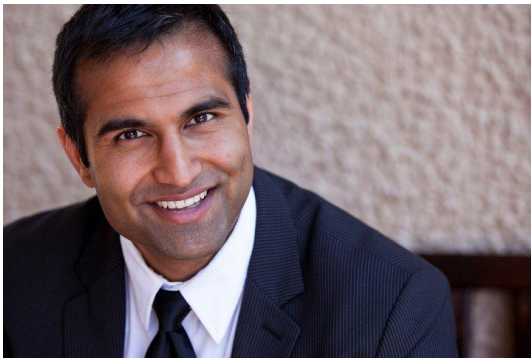
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Ankit Patel, principal partner with [The Lean Way Consulting](#) firm while doing some work with the [Cleveland Clinic](#), discovered Appreciative Inquiry and saw an opportunity to blend it with his work in Continuous Improvement.



Ankit Patel is the founder of The Lean Way Consulting. Prior to starting The Lean Way Consulting, Ankit was a Lean consultant for Dell Inc. overseeing Dell's Manufacturing, and Re-Manufacturing production processes in Lebanon TN. Ankit helped guide the multibillion dollar plant in strategic planning, coaching executives at the plant, facilitating Kaizen events, and training Lean leaders at all levels of the organization. Ankit is no stranger to the board room or the shop floor and has run several strategic initiatives as well as 100's of Kaizen events.

Ankit has also had several years of small business ownership. He has owned a Liberty Tax Service, started his own online computer education company [My Computer Buddies](#) and has been a partner in a sandwich shop and a motel. Ankit has guided a variety of small and medium size businesses ranging in services from veterinary clinics to tattoo parlors.

His experience to change and grow companies ranges from small businesses to multinational fortune 50 companies. Ankit has an Industrial Engineering Degree from Georgia Tech and lives in the Nashville TN area. You can follow Ankit on the blog <http://theleanwayconsulting.blogspot.com/>.

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Implementing Lean Marketing Systems

Joe Dager: Welcome, everyone. This is Joe Dager, the host of the Business901 podcast. With me today is Ankit Patel, who is a principal partner with The Lean Way Consulting. Prior to that, Ankit was a Lean consultant for Dell Incorporated, overseeing Dell's manufacturing and re-manufacturing production processes. He's also done work with the Cleveland Clinic, improving their culture and processes. Ankit's recent work has led him into bringing Appreciative Inquiry to the field of continuous improvement. Ankit, could you clean up that introduction a little bit for me and tell me what led you into the Appreciative Inquiry field?

Ankit Patel: Thanks, Joe. I appreciate it. No pun intended there. My background has traditionally been in Lean and Six Sigma. Before that, my college degree was in industrial engineering. I come from a pretty heavy process-improvement background. When I did some work at the Cleveland Clinic, I actually saw the clinic was doing something pretty unique: they were using Appreciative Inquiry. But they weren't necessarily applying it to continuous improvement. What I noticed was that there's an opportunity to blend the two approaches. For those that don't know, Appreciative Inquiry, at the basic level, is looking at the strengths in the system and in the people. So, what's working well, and how can we take what's working well and build off of that? What I did was I said, what if we took that approach, start from a strengths-based approach, as opposed to what's called "deficit-based," which is where typical process-improvement activities start as, and see how that works. What I did was I worked with the Heart and Vascular Institute. Actually, for those who don't know, they're definitely number one in the country, and they're probably number one in the world, in terms of their procedures and the care for any kind of heart problem that you have.

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Podcast Transcription



Implementing Lean Marketing Systems

One of the projects I did with them was helping them with the turn time between procedures: how do they make that more efficient? What I did was say, "Let's take a look at the strengths-based approach and appreciative approach and how that could get better and working with you to improve that." What that led to was things like standardization, things like takt time versus cycle time, checks and processes and auditing, how we're doing, putting in checklists, all these things that we typically see with a Lean or a Six Sigma or some sort of process-improvement implementation, but the driver was from the positive psychology.

Because of that, we were able to get a lot more traction with it. Folks who participated in the process were much more bought into the process and really, really were gung-ho about it. What I really noticed was that ability to really sustain and help sustain these processes was critical when you came from that angle. That's a little bit about how I got into it.

Joe: You look at Appreciative Inquiry, we'll call it AI as we go on, and you use AI as a starting point. How do you relate that to solving problems?

Ankit: AI, like I said, takes the approach of organizations are a mystery and there's a lot of good things that happen. What you are doing is your end result is still the same, you improve the business and you sustain results. The difference is in how you approach focus. What you're doing is, one, you're focusing on as much of the entire system as possible. If you're looking at let's say improving one department including as many people in the department as possible in this AI process. Then you go into what's called the discovery phase. What's going well? What are some of your best experiences you've had here? If you want to make it topic specific, what are some of the best customer experiences that we've

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Implementing Lean Marketing Systems

had? What caused that to be such a good customer experience? Then extrapolating that out to OK, how can we do that more often and make it a norm instead of a one-off occurrence we see once every two months?

At that point is really a great place to introduce the how. Once you start to get into this is what we want to do but how do we get there then you start introducing things like standard work, things like the DMAIC process of how do you get a rate to improve processes. Things like PCA cycles and some of the other cycles like you have come up with to really show how you can bridge the gap between where they are and where they want to be.

The trick is AI gives you that initial drive and that pull for wanting to change. I think that's a night and day difference with the projects I've run AI versus non-AI.

Joe: In problem solving we always think about the five 'whys' in finding root cause but what you're saying is you concentrate upfront with maybe the what and the how instead of the whys?

Ankit: I think it's a blend of that. It is a little bit of the five whys, too, but its why are things working well and not just why things are broke. Don't get me wrong, we're not going to completely ignore all the deficiencies and what's not working. AI is just a great starting point of initiating your change efforts. What you'll do is you'll be able to find the what and the how and also the why but try to term it in terms of success and wins that people have been experiencing. From a psychological standpoint, it actually ends up opening you quite a bit more, you active a whole different region in your brain. People just tend to react differently once they've focused on the positives. It doesn't seem like a huge

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difference but the actual results that you see from different approaches can be quite significant.

Joe: Are you trying to empower the individual, more so than sitting there and breaking down what's wrong?

Ankit: That's one big thing. When I do these type activities if I choose a traditional try to break it down and what's wrong approach you get very defensive type reactions sometimes. You'll get these reactions of, "Well, you know, this isn't my job," or, "That's not accurate, I don't believe it." And people tend to get defensive, because even though you're not indicting them as a person, they feel attacked because they feel some sort of ownership over the processes that you're looking at. But when you take that approach, the AI approach, of let's look at the strengths, you get all sorts of different reactions. I've had folks say things to me like, "Wow, this process that we're going through," referring to the AI process, "it gives me hope. I've never really thought of it this way. It's such a cool and unique way of thinking about it. I really think that we can make this happen, we can really get some significant change put in place." So all these different...you get a whole set of different reactions. You get people energized versus beat down or very, you know, best case, mutual, emotionally.

That has a lot to do with your future efforts when you work to sustain the changes. That drive and that pull for people that are engaged, that are, you know, activated, I'll call that activated, they're just so much more push and drive to really get change put into place.

Joe: Can you give me examples of some of the questions that I might use to lead into an encounter, or lead into a process and take more of a positive approach when we start out?

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Ankit: Sure, absolutely. I'll give a couple examples. I use a lot of AI with strategy. One of the approaches with strategy, I did an AI initiative with an organization here called the Organization Change Alliance, and what I asked them was...well, first off, what they were looking to do was grow their organization. They're a non-profit association for org development. What we did was we said OK, let's take a...here's a three set of questions that we want you to answer to do some initial data collection, just with the board. And so what we said was, first question, what is it that attracted you to the OCA, which is called the Organization Change Alliance, what attracted you to the organization? They would all talk about it, and they'd pair off in their views.

The second question is OK, what do you think is happening that's just fantastic and we're just knocking out of the park, and you want to see that continue into the future?

The third question there would be OK, let's imagine you fell asleep and you wake up 10 years later and the OCA has grown beyond your wildest dreams, everything you ever imagined is in place. What does it look like, and what are some of the steps that the organization took to get there?

What you're doing there is building successes off the past, and isolating core factors that are really working well, and then building a vision of the future. When you get folks thinking in terms of that, they start getting more hopeful, they get more engaged, they get more passionate to really drive forward.

Another example would be, let's say you're working more on a profit level. I'm working with a client at an IT service company, and one of the things they're looking at is speed of

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closure. They're an IT recruiting firm. They want to reduce the time it takes from the time they get a rec, a requirement, or a job, and the time it actually gets filled.

One of the questions that we would ask to the recruiters is, "Tell me about a time when you had just expedient customer service and closure of a job that you had on the table." We asked them that question and started getting ideas -- "Let's talk about that experience."

Then the next part of that question might be something like -- well, there's a couple parts, but one of the parts was, "If you had to bottle the top five characteristics of what made that experience so great, what would you put in that bottle?" Again same concept there, trying to isolate the factors.

The third part is looking into the future of designing what it would look like if everything was like that top experience that you experienced, that you went through.

The basic format is: what worked well in the past, what are the key factors in how you design a future around those factors. That's just an initial starting point, though. So, it's a very integrative process. Each situation is different. With the OCA, the Association, we'll actually be going back and drilling down into some more specific topics. We're going to ask those topics in a bigger session with both members and also non-members that we would like to become members to get their feedback on how to improve.

With the IT recruiting firm, the service-based industry, what we're going to do is actually take those pieces that we found, and once they're finished we're going to integrate them into some process change recommendations, and we're going to start bringing the team back to the table and say, "These are some things we thought of. Now how do we go and

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do this moving forward?" Things like, we need to standardize, and we need to change our prioritization matrix. Those type of things.

Joe: Sounds like you're doing a Hoshin with Appreciative Inquirer over the top of it?

Ankit: Exactly. It's a great way to drive that. I've used it in several different respects, not just process improvement but Hoshin, as well.

Joe: You mentioned the 4-D's in your conversations. Specifically, maybe not a tool, but certainly a concept of AI?

Ankit: You have the four D processes, Discovery, Dream, Design, and Destiny. Discovery is basically the data collection, asking those interview-based questions, getting that information from folks. The Dream -- you can do that a little bit while you do discovery -- but Dream is, "What's possible? What does the future hold? What can it be?" And then Design is the, "OK. Now we know what we want to be. How are we going to make that happen? What does it look like? What are the specific design elements?" That's a great place to interview some of the process improvement teams. Then you have Destiny. That's also another word for sustaining, but "How do we carry this forward and make sure these things get put into place." Again, a great place for these CI type tools.

Joe: It sounds a little bit like PDCA.

Ankit: It does, surprisingly, right? It's funny how that works. Just like PDCA, you'll go through these cycles repeatedly. We'll go through this 4-D process multiple times when doing our Hoshin planning, once with a board, once with maybe a larger group, and then maybe once again after with another substantive population. It's several rounds, several

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times. It just depends on each situation. But you're right it's very similar to a PDCA session.

Joe: When you talk about problem solving, people think of it very much in linear terms. The things that I've read on Appreciative Inquiry, they're talking about circular questions. Is there a difference in that thinking? What's really the basic difference between the two?

Ankit: I would say that traditional process improvement is a little bit slightly more linear, and there's nothing wrong with that at all. I think that's actually a much needed skill set. But look. I think where the AI process really excels is at non-linear type, breakthrough type of issues. If you want continuous improvement, traditional continuous improvement tools are great for that. If you want serious breakthrough types of initiatives, there are some tools in the continuous improvement belt that help with that. AI seems to work much, much better for that because of the non-linear nature. It allows folks to break free of necessarily what they think is possible because it lets them just think bigger. So you do end up getting much, much larger types of initiatives.

I'll give you an example. Roadway Trucking. They did an Appreciative Inquiry, what they call, Summit. They actually had their own drivers come up with their initiative for a specific depot that could save \$1 million. I think that was, if I'm correct, for Roadway Trucking, about 40 percent of a total revenue. It was an extremely aggressive goal, but they came up with that goal because of this whole process.

Now would they have achieved that otherwise? Possibly, it might have been an edict from the top down, but because they came up with it they were actually able to achieve it and get a lot of good cultural outcomes from that as well. People felt more empowered. People

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felt more engaged. You get fewer turnovers from your folks. People are happier to be at work. It's just a really, really neat way to approach any kind of problem or opportunity.

Joe: I'm from a sales and marketing background. Everything I've always been taught was that I needed to solve a problem for a customer. How can I use Appreciative Inquiry in sales and marketing? Can I?

Ankit: Well, I think you can, I've actually done sales before. What they taught us was you've got to appeal to one or the other things. You've got to appeal to a pain point or a hope and an aspiration. So AI really goes to that hope and aspiration, but I think you can use both. I actually haven't used AI in sales, but just thinking it through it seems like what you could do is obviously listen to what the customer wants. But you can actually talk through what their hopes and aspirations are what they would like to see. That's a very appreciative approach to doing a sales piece.

You could actually ask appreciative questions, like that future state question. "Well, where would you like to be 10 years from now if everything's successful?" If "everything is great, this is where I want to be," it's like, "OK. Well, I can get you there. This is how I can help you meet your vision of the future."

I think that's probably the best way to use AI, but again I haven't had direct experience with using specifically AI with sales. But I would envision it being used that way.

Joe: It would be a great way to really set the expectations of both parties.

Ankit: Yes, exactly.

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Joe: Are you familiar with SOAR at all?

Ankit: That's actually the methodology I use for OCA, is the SOAR methodology.

Joe: Is SOAR just another discipline of AI?

Ankit: It is. I would say it's like a subset, yes. Instead of using the typical SWOT analysis, you'd just go SOAR analysis. But you're really getting the same things. You're just framing them differently. Instead of having threats in there, what you do is you say, "Well, what are the opportunities that we have from some of the "threats" that might be out there?" So it's just a different way of framing it and looking at it slightly differently.

Joe: Do you use that in Hoshin? Instead of a SWOT analysis?

Ankit: That's exactly what I use. I like to use the SOAR. Most of the times I can use SOAR and be fine with it and get away with it. Occasionally you do have to look at things like threats because sometimes people just won't accept that there's opportunity in the threat, like government regulation. So OK, we'll leave it at, "OK, maybe it is a threat," but we try and keep it at the SOAR level.

Joe: When we start out with AI, go through the discovery, dream, design, and destiny that has to be a difficult change for a lot of us. Especially if we're engineers and from a problem-solving culture, that's not an easy step, it seems like we're jumping across a pretty big chasm there?

Ankit: Actually I use this with engineers, and surprisingly they've been some of the most appreciative of the process. They've actually really, really got a lot from going to this. They

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felt energized. I don't know why but some of the best comments...like I've had one engineer tell me, "This is the first time in a very long time I've got hope that things can be better." Things like that are said a lot. I'm not sure what it is, but there doesn't really seem to be, one group may not like it versus another. If the person doesn't necessarily see value with it, they may or may not get anything from it. But it's not going to be for everyone now. Appreciative Inquiry is not one of those things that everyone will see value in right away.

Joe: Have you see what some of the resistance is or when are the times that you would not definitely use it?

Ankit: You know, honestly the best place to use it, I'll refer to what one of the best cases to use it and then talk about when may not be such a good place to use it. But the best place that I've seen to use it is when someone is willing to have the whole system participate in coming up with a change. Whether it's a process change or whether it's a strategy change, but involving the whole group in this process or as much of the whole as possible. That is where AI excels. Where there may not be a need for this or may not be best with this is with a typical, we'll call it more of a dictatorship style of leadership where it doesn't matter. Whatever the team comes up with, it's my way or the highway. There won't be as much success there. There may be a lot of energy with a team, but regardless, the leadership team may still do what they want versus what the team wants.

Those are the types of areas where a traditional process grid may be a slightly better approach just so they can get the results, but they will get the cultural benefits of doing something like AI.

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Joe: Are there ways I can practice to get better at this? I mean are there certain tools out there and certain things that I can say, "Gee, I want to take more of this approach"? What can I do to get there? How can I start training myself?

Ankit: What you need to do is not that difficult. It's more of just looking on the positives and the strengths in people and situations. There are a few good resources out there. I believe AppreciativeInquiryCommons.com or .org. That's actually a great site. There are a few books out there on Appreciative Inquiry. David Cooperrider is the founder of Appreciative Inquiry. Any book by him is pretty good. There's the "Appreciative Inquiry Handbook." There are also some other books that are pretty good just in terms of positive psychology. There's a book called "Positivity" by Barbara Fredrickson that's good. My website actually has a few articles and blog postings on Appreciative Inquiry and how to get started with process changes.

So there's definitely a lot of resources out there, but ultimately if you want to take something away from this podcast today, just ask "What's working well?" instead of asking "What's broke?" That one thing alone is a great place to start. But you need to see what's broke, obviously a lot of us have been trained in doing that.

Look for what's actually going well and how you could take what's working well and grow that. That would be my advice. If someone wants to get better at AI, that's the great way to start.

Joe: If I take AI, I still need the "why" and solve the problems eventually, don't I?

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Ankit: Yeah, absolutely, and that's what the end goal is that's why having someone who's been through the process actually really helps. I think we've talked a lot about more of the touchy-feely types, but by using this process I've actually got a lot of really good results. For instance, reduction of patient wait time at the clinic by 40 percent just by using this process and combining it with some CI tools. Reduction in turnaround time by about 44 percent using this process and again, things like standardization. These aren't necessarily unheard of things, but where the difference is, the results that we saw was, the team actually was able to sustain these changes over a long haul. That's usually the trick with a lot of the change management efforts.

The other thing, too, we also noticed was less turnover. There's a lot less turnover with employees who are engaged in this manner. So we took another area at a small manufacturing firm that I worked with, that had a turnover of 19 percent, using Appreciative Inquiry and then tried to show them the ropes on how to do line design. They reduced their turnover down to three percent. They really got their folks engaged.

There's a lot of really cultural goodness you can get from it. Quite honestly if you're the owner of the business or if you're a manager you don't want to be the one that has to do everything and decide every single thing. You want those self-organizing teams that will be able to solve problems and fix things and come up with great ideas of their own. That's really what AI gives you, is that infrastructure to be able to do that.

Joe: Now what are you doing right now? Are you practicing Appreciative Inquiry? Are you still doing the Lean Six Sigma organizational things?

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Ankit: I do both actually. I look at primarily small businesses and some health care industries, but primarily small businesses, and taking a look at both strategy and process improvement. What I've really noticed I really like to do is apply the Appreciative Inquiry with that. What I find is that by integrating the Appreciative Inquiry approach, you really get a lot of drive and a lot of cultural improvements for small businesses that you wouldn't necessarily have. For instance, with one company that I worked with, the IT recruiting firm again, they were stagnating at around \$3 million revenue a year. Just by doing a simple Appreciative Inquiry Approach, getting them energized, and going through a simple Hoshin plan, we were able to double that. The trick was, some people might say, "Well, the Hoshin plan would have gotten you there anyways."

Maybe, but what I've noticed was that the folks were able to sustain those changes. That's why I really like that AI being put in there. But to answer your question, it's not just AI. I use it as lead and a frame most of my discussions I have and most of my approaches. But it's not the end-all be-all. It's definitely more an enhancer to what's already out there.

Joe: You talk about using AI at the beginning. Then you give it credit for sustaining things. Can you tie those two together for me?

Ankit: Really where sustain comes in is that the folks, because of this approach, become energized and you start getting the pull for these changes. Instead of the changes being pushed down to folks saying, "You're going to change. You're going to do this," they're saying, "Well, we want to change ourselves." Once you get that level of buy-in, then your probability to sustain goes up really high. That's really why I like this approach because it does get people engaged. If the management team can use that energy correctly,

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sustaining happens pretty much every time for at least a year. I've seen that track folks, that they'll sustain changes made.

Joe: Is there anything you'd like to add to the podcast about AI or maybe on the relationship to continuous improvement that I didn't ask?

Ankit: I think the biggest thing is that so many times as continuous improvement practitioners we focus in on what's broke and what's wrong. We don't look at how that necessarily affects the people side of things. You go into meeting sometimes, and you feel like you're getting beat down. AI, like I said, is a great way to get the information and get the results you need without having you feel like it's a beat down. If anyone has any questions on this, please feel free to reach out. If you have any questions on where to get started, I'd more than happy to help.

Joe: How can someone get a hold of you then?

Ankit: They can go to my website to contact me, TheLeanWayConsulting.com. Or you can actually send me an email. It's ankit@theLeanwayConsulting.com.

Joe: Thank you very much Ankit. I appreciated the time. I think you gave a great explanation of AI and how it's used...

Ankit: Thanks, Joe.

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Implementing Lean Marketing Systems



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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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