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Podcast Transcription
Implementing Lean Marketing Systems



We want People to Go See for Themselves

Guest was Bob Petruska

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Bob Petruska of [Sustain Lean Consulting](#) brings 24 years of experience helping a variety of customers including Health Care, Aerospace, Automotive, Food, Office and Service industries improve their performance. He is a consultant, presenter, trainer and published author.

Bob holds a Masters of Science in Manufacturing Systems, and a Bachelors of Science in Industrial Technology. He is a Senior Member of ASQ and holds a Six Sigma Black Belt Certification. He is also a member of ISPI. An active Toastmaster, Robert recently completed his Competent Communicator requirements and is volunteering as a webmaster. He also volunteers his time at ASQ and the Metrolina Association for the Blind in North Carolina.

His new book, [Gemba Walks for Service Excellence: The Step-by-Step Guide for Identifying Service Delighters](#). It is heavily illustrated and includes a CD of his innovative “placemats” designed to provide stepping stones on a development path for your team to achieve a competitive advantage.



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Podcast Transcription

Implementing Lean Marketing Systems



Transcription of Podcast

Joe Dager: Welcome, everyone. This is Joe Dager, the host of the Business901 Podcast. With me today is Robert "Bob" Petruska. He's an independent consultant who helps organizations identify and remove barriers that prevent employees from delivering an exceptional customer experience. Bob is an avid presenter and; through presenting, Bob was contacted and got the opportunity to write the book "Gemba Walks for Service Excellence."

Bob, I'd like to welcome you. Tell me the story of how you ended up writing a book.

Bob Petruska: Hi Joe, It's awesome to be on your podcast. I really enjoy them. How did I get to write a book? It was interesting. I was passionate about service, and I was very interested to understand how some companies really seem to knock it out of the park.

It really doesn't take much to differentiate you in the service business, because we're so accustomed to such pitiful levels of service. When a company seems to click on all cylinders and get it right, it really stands out for us.

I was given the opportunity to present at ASQ's Lean Six Sigma Conference in Phoenix, Arizona, about a year and a half ago, and it was very interesting what happened. I put a Gemba Walk up on the walls, and basically, I had a conference room, if you can imagine it, was like an art gallery of all these different pictures and hand drawings. People came in, and they were...

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Podcast Transcription

Implementing Lean Marketing Systems



Bob: "Wow, what is this and how could it work?" and so on. Bottom line was that people; I think, really resonated with the message that I was giving. We had this very interesting thing happen. About 10 minutes into the presentation, the back door opened and a number of people just entered in. I'm like, "Where are these latecomers coming from?"...

It was the weirdest thing for me, because I was so surprised, and they were wearing such nice clothing. Ultimately, I found out later; it was people that were tweeting during the presentation that were saying, "This is so cool. This is so wonderful. This is so fun," and it was attracting others in concurrent sessions to leave it and come to my session.

Later, I met one of the latecomers, who was Michael Sinocchi from Productivity Press, and he said he's been to a lot of presentations, and he did not understand what was going on in most of the presentations.

The bottom line was that he'd told me that he could really follow what was going on. Amazingly, there was that situation that happened, and I guess I owe it to the people in the audience who were tweeting during the presentation for me to ultimately write a book.

Joe: That's interesting. Social media even plays a role today in conferences.

Bob: Exactly. I've been really thrilled to find out how Twitter was using...At that point, I didn't even know how Twitter was being used, but then it dawned on me that what people are doing is they're telling their followers what's going on at that moment of time.

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Joe: I don't know how this will come out, but it's meant as a huge compliment. When I looked at your placemats, which we'll get into in a little bit, you proved that you did not need to be a Picasso.

Bob: I take that as a compliment too. Part of the thing about drawing, it's really authentic, and it's from the heart. My drawings are messy and imperfect, but they capture your imagination because of their imperfections. I think that draws people to me, because they know it's authentic.

Joe: I always think the more precise it is...it's like a prototype. If you send a completed product to someone, they won't do much with it. But if you send them, a product that is duct taped together and have drawings attached to it, they'll take it apart and play with it. You'll learn so much more. That's what I thought about some of the information you had. I wanted to play with it.

Bob: I'm thrilled. Thanks for the complement. That's awesome.

Joe: Tell me, is the book a description of the placemats? How do the placemats fit in with the book?

Bob: What the idea of the placemats was to provide the leadership, the team leader if you were a step-by-step methodology to follow to raise the performance of the entire team. Basically, instead of using a PowerPoint--I'm pretty much anti-PowerPoint, because we've been Power-Pointed to death. But instead of using that, the placemat guides a conversation. It provides enough information for a team leader to take their team through an hour-long meeting and help them reach some higher level of performance.

Business901

Podcast Transcription

Implementing Lean Marketing Systems



We start very easily, but then it gets harder quick, as people learn different skills. Brainstorming is one of those, and then we explore other ideas like the Kano model, and how do you organize for excellence, and what's your value proposition? The team gets immersed in the education process that's being delivered to them by the team leader.

Joe: Your book, "Gemba Walks for Service Excellence," is it really getting out of the factory? Getting out and seeing customers? Is that the main message that you send in it?

Bob: The main message from the book is that there's an opportunity for people to identify new things that will resonate with customers. By this, I mean delighters. There are things that are unexpected by the customer, but would really cause customer delight to occur. O'Connell calls them "delighters." What I was challenging people to do with the book was to take a Gemba Walk. I've got several in there that I show people. Basically, we go on a Gemba Walk together, several of them.

But look at it from the standpoint of what could you apply to your own business that would increase customer delight, which would then lead to this ultimate goal, which is the word-of-mouth advertising and increased business.

You've got increased profit. You've got increased revenue and top-line growth, if you can innovate faster than your competitors. That's basically it, in a nutshell.

Joe: When you address Gemba Walks, the old story of go and see for yourself, what stops an organization from doing that? Why do they want to stay internalized? Is the fear of the interaction or what have you found out?

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Podcast Transcription

Implementing Lean Marketing Systems



Bob: It's very interesting that organizations tend to manage by reports. What I've found is that, when you ask the leader, "Hey, why don't you get out more often and find out what's really happening?" They'll tell you "I'm overwhelmed with the current requirements that I'm being asked to figure out."

Complicated Byzantine financial reports are a great example of a legacy that goes back, probably to the 1800s.

Unfortunately, many managers are just chasing this rearview data of how the organization performed to find reasons or rationales for changes in performance. Unfortunately, that requires so much time sitting in the office that it's very difficult for them to come out.

We really need a disciplined approach where a leader says, "You know what, I'm going to actually put it on my calendar to go out and do a Gemba Walk, to understand what's going on in the front lines."

Because that's where the action is, that's where the customer is, and that's where I want people to focus their energies and efforts.

Joe: What you're saying is really, "Get out of the car. Quit looking in the mirror, and go to the front of the car and look back at the car."

Bob: Or look in the parking lot to see what's around you. I really want people to not only look internally on what their operations are, but I think there's a lot to be gained by looking outside. We talk about benchmarking and benchmarking is great, but normally

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Implementing Lean Marketing Systems



benchmarking is within the same industry. What I'm challenging people to do is to go outside of your own industry and look there for the new delighters.

If you tried benchmarking, you can only get it as good as the leader. You can't really leapfrog that. You're always playing catch up. But there are truly innovative companies, I think, out there, and they're stretching the boundaries for what's possible.

Joe: Thinking of it as a service organization or a manufacturer or something, I hear people come in and tell me, "I got to get out." I got a lot of stuff to do. I mean; I'm just flooded. I've got way too much stuff the way it is. How do I prioritize? I mean is there a key there that says, "Gee, two hours of my day I can do Gemba Walks." Should it be that high a priority?

Bob: Well, I don't think it's necessary to spend two hours a day doing Gemba Walks, necessarily. But I think that there needs to be this thought process that improving the work is just as important as doing the work. If you believe in continuous improvement, then you are going to be looking for ways to improve the work. Gemba Walks is one of the great tools, especially when you start looking in the service organization, to identify things that will really improve for the customers.

Customer feedback is extremely important. Unfortunately, many times, it's, "A day late, a dollar short."

How can you get real-time customer feedback? How can you get customer feedback during the point of sale, during that moment of truth? How do you do that and how do you get real fast reactions to it to create that delight?

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Podcast Transcription

Implementing Lean Marketing Systems



There are ways to do that. I think there are a lot of new technologies that are coming out now; that will enable people to get a much better, clearer picture of where their customer's heads are at. This will help guide organizations with that priority of where they need to put their time and energy and effort.

Joe: A lot of the things that we talk about...what's the difference from the internal data that I gather, surveys, focus groups, different things like that than looking at it from a Gemba Walk perspective where I go see? Can you name me some of the big differences between the two different ways to evaluate my service?

Bob: Great, yeah. When you look at the data that's internal, it's very internally focused. It's focused on maybe the internal costs. For example, in a call center, it may be about how long are we spending with our customers. A Gemba Walk, you're not necessarily focusing on that, you're focusing on what does the customer need or what are the customer's problems you are trying to solve?

A great example of this is a company called Inuit. It's a software company. They decided that they weren't going to put their low-level people on the front lines answering calls to understand how the customers were using their products.

Instead, they put their top-tier programmers and a CEO, who at the time was the founder of that, is Scott Cook. He decided, "I'm going to invest in this."

The competitors thought he was crazy for doing that, but he thought it was so important for their company to get this first-hand data and have their programmers really understand what frustrations the customers are having, that they would design future products with

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Podcast Transcription



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those things in mind and improve it, and thereby reduce the need for those costs to come in the first place.

It's a different way of prioritizing and strategizing what you do as a company. There are some companies I call, and there is a cell phone carrier whom I have, I won't name them, but the first thing that I had happen to me when I call them is I get a computer.

The computer gives me these 10 options, and I've got to listen to all 10 before it allows me to select number one, you know? Then, it's going to transfer me to another computer and so on and so forth.

As a customer, I do a Gemba Walk on it and the problem, the reason why I'm calling them is they've been double billing me, and none of the systems in the cell phone carriers controls pick up the fact that I'm double billed. I have to call them. It's very, very frustrating as a customer when you have certain organizations that really put the wrong metric in front.

It's not about the customer experience. It's about controlling costs. I think the difference in the thought process is around that, and I think that needs to change.

Joe: One of the key things that jumped out at me in your discussion, you talked just briefly about innovation. Innovation really comes from that customer experience, doesn't it?

Bob: Yes and Apple is really interesting as we learn more about it. There is a trial going on currently with Samsung. It's peeling back the onion giving us new information and new

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Podcast Transcription

Implementing Lean Marketing Systems



insights on how Apple operates their innovation process. They're very team orientated. When you look at innovation in service, you can't do it in a vacuum, which is the reason why the Gemba Walk can't be done like the old undercover boss, where the CEO goes in disguise and incognito and tries to go behind the lines and work as an employee.

That's not a Gemba Walk. Some of the principles are similar, but Gemba Walks are done out in the open. There's one difference. The CEO is not necessarily involved in it.

We want people to really go see for themselves and come up with something new and innovative and learn from someone else, see how that could be applied to their own industry.

For example, if you're in the healthcare business, and you're benchmarking another healthcare, you might benchmark the Mayo Clinic or whatever it is, but who's benchmarking the hotel industry from the healthcare? What could you learn about the customer experience through the eyes of checking in at a hotel?

I think what's really key about the Gemba Walk is putting you in the shoes of being the customer, and you end up feeling like you are a customer. Would you enjoy the experience that you've created in that service design? That's just a question for people. What can you do to design your service system to do a better job to delight customers?

Joe: Back to instead of looking at a car, looking at a parking lot. If you're a healthcare facility, maybe you need to take a Gemba Walk at the Ritz?

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Podcast Transcription

Implementing Lean Marketing Systems



Bob: Exactly! If you think about it, they have a check-in process, right? There's also a check-in process at the hospital. When you go to the hospital, there's that insurance. You've got to show them the insurance card, how many times is it, nine times or 10? OK, I'm just kind of jabbing them a little. There's that. How many times do you have to write down that you don't smoke cigarettes? By the time you get down to the third floor, you've had to tell them you don't smoke cigarettes 10 times by then. It's just a question.

There're so many opportunities to improve that experience. Being on time is another one. How long should it take to get through? How do you manage the customers' expectations throughout the process? When you're standing in a big, long line, the last thing, you want to do is think that you're ignored and that you have no earthly idea when it's going to be your turn.

Joe: I think that's a good point, because you can go to Disney; you can go to the Ritz; you can go to some of the kiosks at the airport and learn from them and apply them to your business.

Bob: Thank you. Yeah, it's really about engaging the team. I was at a resort this summer, down in Myrtle Beach, South Carolina, which is our favorite vacation place. The resort has really ratcheted it up. I noticed it over the past year. They've had some consultants come in and help them. One thing I've noticed is employees starting to take initiative. This resort was very funny in that they fired some of their worst customers, and they fired some of their worst staff, and they replaced them with friendly, outgoing people. It was just amazing to see that investment in talent. In the process, I noticed people taking initiative.

I asked a young lady, I said, "Hey, what are you doing today?"

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She said, "Well, this is what I'm doing. I'm taking care of the customers this way."

I said, "What were you doing yesterday??"

She said, "No."

I said, "All right, well, tell me how you got permission to do this?"

She says, "Well, I thought of the idea, thought customers might appreciate this," which, by the way, I did, and she said, "I went to my boss and told her what I was planning to do, and my boss told me to go ahead and do it."

Now, that's the key; people feeling empowered to do an experiment on the spot to improve customer service, and that has to come from a culture that managers are receptive to the ideas of people. I think Gemba Walks is a great way to open the door for that.

Joe: The thing that is interesting to me, as time goes on here is that Lean has transformed itself from this process methodology to a people thinking methodology, for lack of a better word. As we've gotten more technology, we're putting more emphasis on developing people and leaving people react to other people better.

Bob: When we look at a team of people, they really need to understand how they all work together, and we've got to have rock solid processes and systems to support them. When we look at a Gemba Walk, we want to look at what's going on behind the scenes. It's one thing to see service excellence occur where it's really outstanding, and it blows us away, but what peaks my interest is what's going on behind the curtain. It's there that things start to shake out.

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Podcast Transcription

Implementing Lean Marketing Systems



As you mentioned Apple earlier, Apple's had that curtain drawn pretty tightly. In fact, on the iPhone, they had a team of 1,000 developers working on it, and they had a special floor that was completely sealed off, cameras in the hallways, special ID cards and everything, and no one was allowed to talk about it. That's really building that competitive advantage.

I think we, in our industry, could learn a lot from the different service providers if we could see what's going on behind there. That's rare to do, so we have to pay attention closely to what's going on where we can see what's out in front of us during those moments of truth but imagine the systems that are taking place behind it.

Another way we can find out is by reaching out to the people. I've had very good success with just calling them up and asking people, "I noticed that you did this, and it was fantastic. I love it. Tell me more."

I will get to the right person and then learn how they managed to build that team and how they managed to have seamless handoffs and people working together seamlessly and very effectively.

Joe: You're also saying, though, that we have to create a team, and that team just doesn't come from training. A lot of it is hiring.

Bob: Yeah and there are two ways to look at hiring, Joe. I think the first is do you hire for attitude or aptitude? Unfortunately, what happens in the service industry is that top talent, those with the attitude and aptitude together, are the most sought after, and so it becomes

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Podcast Transcription



Implementing Lean Marketing Systems

a shark tank, where people are fighting over that top talent and trying to steal from their competitors and it raises the cost and so on.

But I think that, when you take a step back and look at it, it's really the attitude that matters most, aren't it? The aptitude is something you can train people on, but the attitude should be the point of admission.

When you look at building teams, it is very difficult to hire the right people, no doubt, but if you had a choice, it would be the attitude over aptitude when you're talking about service any day of the week.

Joe: We've touched upon so many different facets of the organization, and we started out this conversation with the Gemba Walk. The Gemba Walk touches everybody.

Bob: Yeah. That's the funny thing about it. The Gemba Walk is easy. It's just, "We're going to do this thing. We're going to do it as a team, and we follow the entire step-by-step guide." But that's what I say. You've got to peel back that onion. It's one thing to talk about Apple and say, "Wow; they're fantastic. They're fabulous. Look what they've done and look how they've innovated," and so on, but what you don't know is what's going on behind the scenes.

That's the reason why those placemats are so valuable, and the reason why you would want to buy the book is because of that. Because you get the placemats, and you get a step-by-step guide to take your team and kind of peel back that onion and look behind the curtain and create that infrastructure yourself that will support an exceptional experience for your customers.

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Podcast Transcription

Implementing Lean Marketing Systems



Joe: Are the placemats A3's or kind of your version of an A3? Can you explain one of them?

Bob: Oh, thanks. That's a great question. I look at the placemat as a substitute for PowerPoint. Instead of giving a team 10 or 20 PowerPoints, I have one placemat. On the placemat, it's very boiled down to the essence of the information needed.

On one part, there're some definitions. On another part, there might be a drawing, a hand drawing with some more description, and how do get started. It even gives you a place where you can record your notes.

The idea with the placemats is that every team member gets a placemat that would point right in front of them, like a placemat...was the focus conversation, which the focus conversation is about pulling the wisdom of the team. If all you do as a team leader is talk, and all the team's members do is listen, you've got interaction and zero possibility for innovation.

But if you can, at the end, start engaging people with these questions that I put here, using that way to pull information and ideas, better ideas, new ideas come out.

I'll tell you something I've learned. People don't argue with their own ideas or their own data. They will do what they can to make it work and if it's wrong...

Sometimes, I'll let the team make a mistake as long as it is not mission critical. The reason why I do that is because I want them to learn from it. Maybe it's not the best idea in the world. Maybe I have a better idea as a team leader, but I'm going to bite my tongue, and

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Podcast Transcription

Implementing Lean Marketing Systems



I'm going to say, "You know what, you guys? I want you to try that and tell us how that goes."

They learn. What we are after is organizational learning, in essence.

Joe: What does ORID stand for?

Bob: ORID is the art of the focused conversation. That is from that book. This stands for Objective, which is what. Reflective, which is the gut. Interpretative, which is the so what. D, Decisional, which is now what. Ultimately, we want people to come up with actions and to take the organization in a step in the right direction. By asking those questions in that order, we engage all the people on the team, and there is some accountability at the end because now we want to know. What are you going to do now?

Joe: What would you like to add that maybe I didn't ask?

Bob: I'm interested in seeing all service industries improve. As a customer, I've got a vested interest in it. I am a customer of the service industry. People have choices.

I think there's a lot of room to improve overall. I like to help organizations improve, so my ultimate goal is to help my clients in my consulting practice to improve their operations.

Joe: What's the best way to contact you, Bob?

Bob: At this moment, it would be my Gmail account, which is gembawalks, G-E-M-B-A-W-A-L-K-S, @Gmail.com and my website, which is bobpetruska.com. All one word, B-O-B-P-E-T-R-U-S-K-A.com

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Podcast Transcription

Implementing Lean Marketing Systems



Joe: Well, I would like to thank you very much. I enjoyed it; I enjoyed the book, and I highly recommend people to take a quick view of it. There're a lot of colored pictures in it and different information. "Gemba Walks for Service Excellence," and it's available, of course, from CRC Press and Amazon. I'd like to thank you for your time and look forward to talking to you again, Bob.

Bob: Well, thank you very much, Joe. It's my pleasure. Appreciate it.

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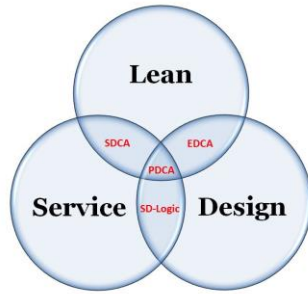
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Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

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