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*Podcast Transcription*  
*Implementing Lean Marketing Systems*



## A Starting Point for Lean

Guest was Natalie J. Sayer

*Business901*

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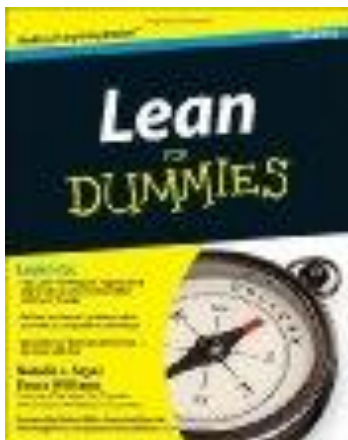


**Natalie J. Sayer** is the owner of I-Emerge, an Arizona-based global consultancy, and co-author of *Lean For Dummies, 1<sup>st</sup> edition*. She has traveled the world extensively, working with leaders in English and Spanish, to improve their daily lives, businesses and results.

Natalie began studying and applying Lean in the automotive industry, in the US and Mexico before it was formally known as Lean. She has trained, coached, mentored and rolled up her sleeves to implement Lean in organizations ranging from Fortune 130 companies to micro-businesses.

She brings a unique blend of people, process and cultural skills to every project. Natalie has a Bachelor of Mechanical Engineering, a Masters of Manufacturing Systems Engineering, is a graduate from Coachu, a professional speaker, a Six Sigma Black Belt, a Global Leadership Executive Coach and an actress. She is a passionate people person, who lives her life with the convictions “there is always a better way”, “change won’t happen without the people”, “adjust yourself accordingly” and “learn from every life experience and move on.”

“To strive, to seek, to find and not to yield” - Alfred Lord Tennyson



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## Transcription of Podcast

Joe: Welcome, everyone. This is Joe Dager, the host of the Business901 podcast. With me, today is Natalie Sayer. Natalie is the founder and the President of iEmerge, a firm dedicated to moving individuals and organizations ahead through coaching, consulting, and her speaking. She is the coauthor of "Lean For Dummies", which I will add, is an excellent book if you haven't read it. Natalie, I would like to welcome you. Could you start the podcast off by explaining why you decided to become a Dummies author?

Natalie: Thanks, Joe, for your kind words. It was one of those interesting serendipitous moments. I actually happened to meet my coauthor, Bruce Williams, here in Phoenix, at a group called The Phoenix Think Tank. He was just coming out with "Six Sigma for Dummies", so he really had the connections for the Dummies people.

I've been involved in the continuous improvement world and particularly Lean long before it was branded as 'Lean'. I'd come out of the automotive industry, and I had two main motivations. I wanted people to realize that Lean isn't just about tools that the people, the respect for people pillar and the strategy is maybe even more important than the tool part. The tools will get you so far, but if it's just disconnected use of tools, you're not going to sustain what you gain.

Then the other thing is people want to add modifiers after the word 'Lean'. When they do that, I think it shortens people's minds as to what's possible. 'Lean

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manufacturing', you'll hear that term a lot; Lean did start in manufacturing, but it rapidly expanded to all the operations that support manufacturing because you can make a product in 5 minutes, but if it takes you 5 weeks to get your materials; you got a problem.

The second motivation was to make sure that people realize that Lean can be applied not only away from the factory floor but also in other industries, whether in healthcare, in construction, in services, really anywhere where you have a process, you can apply the principles of Lean.

Joe: I thought you published a second edition last year?

Natalie: We did.

Joe: Why did you?

Natalie: It had been 5 years since the first edition, and it sold so well they were looking for an update. They felt that there was a market out there for it. The book is still selling well, but there were some things that we wanted to be able to include. For more super-users, people who have the book dog-eared and tabbed up so much that I think they might even know the book better than we do, they requested that we move people and strategy stuff up front. It really is important to make sure that the culture is considered, as well as the strategy and the bringing people through change-piece.

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The other thing is the first go-around there were a couple of tools, 3P, in particular that we weren't able to fit in the first version, so the second version has a few case study vignettes. There is no one large case study or recipe for how you apply Lean. It was an example of how some different people in different industries have applied different tools of Lean. It was really time to update it.

One of the things that we've been told is that it's a really good first primer. Unfortunately, the Dummies title does scare people away from it. Dummies does not mean stupid. The brand identity of Dummies is for the curious or the uninitiated. Not too long ago, I had a company approach me, "Do you have your book? It's really good. We want to use it as a field guide, but do you have it without all that Dummies stuff?" To that, I say, "You can print up brown paper wrappers or stickers." I had one client that Photoshopped the Dummies away and put "For busy executives." Get over yourselves. It's actually a pretty good as we've been told, a pretty good first introduction to Lean. This one company is going to use it as their field guide for their Lean journey.

Joe: How helpful has a book been to you, as marketing yourself as a consultant?

Natalie: It has gotten me to places that I wouldn't otherwise have been in contact with through my normal work. I come out of the automotive industry. I've done a lot of leadership work in the last 5 years, and the Dummies book has had people from the food-industry contact me; the construction industry contacted me, the

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transportation industry, so it's been a good calling card. Although as I just mentioned about the Dummies part, people sometimes shy away from it, so it's been a good first introduction for people and a good calling card. I guess it adds street credentials; you're a published author by a major house. That I guess is worth something.

Joe: Do you think every consultant should write a book?

Natalie: That's an interesting question. The book does lend credibility, but I will tell you that don't expect to get rich off of a book. It's more of a calling card; it's more of a portfolio. I think if you have a quality blog, that might be a better place to start because it does take a lot of time, number one, to do a book, and the book publishing industry is changing so much. To be able to get it done by a major house is not as easy as it used to be. In addition, self-publishing is an option. Before you would invest the time, I think it would be important to make sure you're clear on what your message is and where your niche is.

Joe: Your book serves an introduction to many people about Lean. You have to have a pretty good idea what people's misconceptions are, I think. Can you help me with that?

Natalie: I think the misconceptions are Lean is a tool. People try to cherry-pick tools; they've been doing it for years. As a matter of fact, when people first started studying Toyota, they just saw these tools. They saw the model of the Toyota

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production system. I'm assuming that your listeners know that Lean really came, or was a branded version or observation, by some MIT academics studying Lean saying, "Hey. What's different with these guys? You know what, it's like they don't have any fat; it's like they're Lean." Thus, the brand of Lean or the tag of 'Lean' became the way it was known.

People would try to implement the tools but without understanding the context or the environment in which they were generated or thrive. I hear a lot of people say, "That's just what we used to do back in the day." That's another misconception. While Lean did from people like Dr. Deming, helping out in the reconstruction after World War II, Taiichi Ohno and others really added to what we know as Lean; the body of work, some of the different tools. There're inspirations that come from a lot of different places.

Another misconception that I hear is leaders think they can phone it in if you will, or they can delegate Lean away. When you disconnect Lean from your strategy, you lose the sustainability. It becomes 'that other thing that we don't have time to do', instead of 'the way we do business, the way we think about our work'. I think those are two of the big misconceptions. The other one is as soon as you add those modifiers, "It's not for us. That's for those construction people. That's for those manufacturing people. That's for those healthcare people. It doesn't really apply to me. In reality, as I mentioned earlier, Lean applies to anywhere that you have a process. You can apply the principles and reductions.

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The other thing with Six Sigma entering into the world, I can remember when Six Sigma was a research paper that was published out of Motorola back in the late '80s. It was before it became an offering by consultants. It really goes back to the variation. Six Sigma as a practice, was starting to wane, and then another consultant combined some of the tools from Lean and called it Lean Six Sigma; again, missing the cultural piece and the people piece and the strategy piece.

One of the other misconceptions I hear a lot is, "Statistics? That's for Six Sigma. Lean? That's just for getting rid of those easy wastes." If you truly understand Lean, you know that they're 3 major categories of waste: Waste due to variation, waste due to overburdening, overstressing the people process and system, and the general wastes that people use or associate with Lean, known by a couple of different mnemonics. The one that we used in our book is 'downtime'. Another one is 'Tim Wood' that people will use. We used downtime; we actually changed in this go around. We changed the pneumonic to include the people piece.

Joe: I think one of the misconceptions I always see is when people attack Lean that don't really understand Lean; they use Six Sigma as the description.

Natalie: Exactly.

Joe: They do the command, control, and all these other things, and it's like no, no, no.

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Natalie: I so agree with you, and that's one of the other things, this belt stuff. OK. Six Sigma, when Michael, Harry, and company decided to form it as a consultant offering, it has merits. I have my Black Belt, so I'm not here to rag on the community, but one thing that I don't agree with is the way that it was rolled out. It was rolled out as something special. You have these super-secret Black Belts that are statistical gurus, and then you have Master Black Belts. Then if, you do a project, then you're a Green Belt or you're a Yellow Belt, and then all this belt stuff came over into the Lean language. Now there are people offering belts or certifications. What does that really mean? It means you've done a project. Does it mean you understand all aspects of Lean? Don't think so. Have you run into that, Joe?

Joe: I think so, yes. I see it more and more where people are asking for Lean certifications. This is not my intent to, let's say, to bash human resource people because this is where you see it a lot, but it's a way of justifying experience, just like a college education. "Are you a Master Black Belt?" Now you see, "Do you have Lean certification?" These are really tough subjects to get into.

Natalie: It's interesting because I don't necessarily know what the answer is, but I can tell you I've met a lot of people with a certification that really don't understand what they're talking about.

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Joe: That's where I think the struggle is. Lean, I have seen developing less as this expert status type thing and more migrating towards the coaching aspect. Which I think fits Lean better.

Natalie: I think it's interesting because if you don't have the right Lean guide if you will, call it a sensei, call him a consultant, call him a coach, whatever you're going to call it; if you don't have the person with a breadth of knowledge, and also implementation experience, there's also a chemistry fit. I was at a conference last week where they talked about one of their lessons learned is they wouldn't have brought in a Lean consultant, it was because the person that they had brought in didn't have a lot of experience and had no experience in their industry; it didn't seem like a right match. I think independent of what you call it; I do think coaching skills are definitely required in a Lean guide. You got to make sure that they're the right fit for your organization.

Joe: Has Lean become the dominant continuous improvement methodology just because of Toyota's success?

Natalie: That's an interesting question. Definitely, the fact that Toyota has been successful, but the reality is I think it just makes sense. When you start studying it and understanding it, I think you find that it makes sense. When you start looking at your business through the eyes of continuous improvement, through what waste can look like, and how can you deliver, it's really about delivering value effectively to your customer. Once you start identifying customers,

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understanding customers, and understanding what we do that doesn't really add value to the customer, I think it just starts making sense.

You can carry it to extremes when you truly start being a Lean person. I have one colleague who Kanbanded his kitchen and his teenaged boys were pretty unhappy when they didn't have the cereal that they wanted. He said, "Did you put the card in the box?" They're like, "No." That didn't happen again.

Joe: I'm sure you can get carried away. I have a little pet peeve that I'll say about this. It seems like every time we do something Lean; someone has to justify or verify whether Toyota did it or not. Do you think Toyota limits Lean, and can Lean grow without Toyota?

Natalie: Honestly, yes, I would agree with you on this one. I was thinking about this the other day when I was coming back from a conference that while Toyota is the touchstone, if you really believe about the idea of Lean, then you need to continuously improve. You can't just implement what Toyota did in your culture. It's not going to work because you have a different culture, different person, a different way of doing business. It was successful. Am I saying it's not successful? No, I'm not saying that. I'm saying if you look at the origins it grew up in, in a Japanese culture, which is very different than an American culture. From a communications standpoint, tend to be much more high-context, versus American low context, tend to be much more indirect versus American direct; tend to be much more hierarchical than the independence of America. There are

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some things that you do need to adapt to the culture that you're applying it in. I don't think we should be limited by, "Did Toyota do it that way?" I think if you believe in continuous improvement, then you can improve, based on your environment and your context.

I think in some ways, there is some limit. The other thing that I've seen is, "Look at Toyota's troubles." That is going back to the question you asked me earlier about the reason for the book. One of our editor's questions was, "Is this stuff really working? Look at all the problems Toyota's had with the different recalls and the issues that they had a few years ago." I think it still works. When people look at Toyota and their troubles and say, "See, it must not work, because look at them," that's just a data point. I think that Toyota, yes, is by far the most successful organization, but there're a lot of other organizations that have had success, as well. I think it's OK to evolve beyond and try things in a continuous improvement journey that didn't necessarily come from Toyota.

Joe: One of the things lately about Toyota, they seem really quick to pull the trigger on recalls. Do you think it's from that before? Do you think this is part of their continuous improvement culture to do that now?

Natalie: I don't know if it goes back to the continuous culture piece of it, Joe, but I think it does come back to they learned some really key lessons from their troubles. One of the things, most of their decision-making was very centralized in Japan. We talk about silos, and the silos over there did not understand the cultural

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context of just because the data didn't prove it out didn't mean that there wasn't a problem in the States because of the way the media covered it, the way people were expecting responses, etc. I think that they learned from their troubles. One of the things that they're more quick to do is to recall because in our society here in the States, it's probably a safer path than not.

Joe: You mentioned something really key there was central decision-making. Are they going more to decentralized thinking?

Natalie: I don't know if it's completely decentralized because I'm not in the organization, but from what I understand, is that they have given more decision-making empowerment to the country heads, to people on the ground in locations where they operate. I'm not sure what the touchpoint back into Japan is. I don't have that knowledge, but I do know that one of the things that they did was to give some more decision-making power and customer touchpoint power to the home countries.

Joe: Which I think goes hand-in-hand with the type of thinking that is now taking place that you have to move decision making closer to the customer.

Natalie: You also have to have; I think, the people making the decisions understand the customer; the way the customer thinks, what they're looking for; in this case, the customer being the consumer. There were other stakeholders, and Toyota's reputation to be number one in the world is key. They just regained it, and then

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I think we just had another recall announced. With the governmental agencies, those other stakeholders that aren't the ultimate consumer, but understanding the environment in which you operate is, I think, one of the things that are very important.

A lot of companies going global, if you will, still retain their identity and their mindset of their country of origin, whether it is an American company working abroad or a Japanese company working globally. I think what they've done to make sure that people who understand the culture and the consumer where they're operating having more decision-making authority, I think that's just good business.

Joe: You talked about a couple of things there; labeling Lean, Lean Healthcare, Lean Construction, Lean Services, and Lean Manufacturing. You also talked about Lean 3P design. We talk about standard work. We're getting close to having a truly Lean Enterprise. Is that possible in the near future where all the components are clicking on Lean?

Natalie: I would like to think so, Joe. I think it depends on the leadership of the organization in which you're operating; how that leadership carries through the organization. I've seen a lot of organizations that have pockets of success, whether it is on projects, and I was part of an organization that had pockets of success. It's interesting; this is how key leadership is. I was part of an organization. It was an organization within General Motors. People might not

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think General Motors as being a pinnacle of Lean, but there were parts of the organization that had a lot of success. We were on an 11-year journey at the point and time we were sold; this has been a few years back now. The company that purchased our operations dismantled inside of 6 months what we had taken 11 years to build. Then they wondered what happened and why the performance wasn't there. 1½ year later, tried to hire back a key executive who was a leader of the journey, gave him more responsibility than he had originally, and he didn't have the infrastructure or the people that had the right mindset that had a Lean mindset operating.

Without the leadership there, then you're only going to have limited success. When you have new leaders come in, that was one example. I believe Wiremold was taken over by another company that didn't understand the whole Lean journey, and they lost ground afterwards. I don't know what you've seen, Joe, but that's one of the things that I've seen. To truly get to an overall Lean organization, if you don't have the support at the top, it's not going to happen.

Joe: Let me jump back to your book, in your book, you do explain different tools. You explain 5S and 5 why's and things. It's not all about culture and strategy.

Natalie: Absolutely, Joe.

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Joe: Let's say I read your book and there're some tools I want to pull out, and I want to use. Do I have to go to my CEO and say, "Hey? We got to install a Lean culture around here," before I start using some of these tools.

Natalie: No. Like I said, you will have success using tools. Don't expect to transform the way you do business just by using some tools. What happens is people think the tool becomes Lean; "We do 5S. We're Lean." No, that's just one small tool. I have a neighbor here, and he works for an auto shop; it's a national chain. They started doing Lean, and they started with a 5S, and his local manager here basically just says, "Let's Lean it up. Let's do 5S. Let's Lean it up." Lean has become synonymous with 5S.

You don't just do 5S to clean up. You just cleanup to cleanup. If you truly are going to have the discipline of 5S, which is a workplace organization technique that brings you visual management, so you have a place for everything, everything in its place. You eliminate safety hazards. By having a clean environment, you think of like NASCAR garages; they're immaculate. Why are they immaculate? Because you need to be able to detect, are you leaking any drops of oil from anywhere after this maintenance? People take things out of context, and that's the problem with being a tool-monger.

Absolutely, Lean is delivering value effectively to your customer through respect for people and continuous improvement; continuous improvement synonymous with elimination of waste. The way the book is setup is we give you a little

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background and then we talk about the culture, strategy, people, and change. Then we talk about value: What is the value? How does your customer define value? The whole idea of the value stream and mapping your value stream and identifying an ideal state to work towards, and the incremental next steps, and the idea of Kaizen, which is continuous improvement.

Then the next part is the specific tools: Tools around flow, tools around perfection, and tools for the executive or leadership-level. We get into the toolbox if you will. It's like you go Home Depot, and everything's not a hammer job, so that's the problem when you just pick one tool as your favorite tool. If you're going to do a landscaping project, your tools are different than if you're going to do an indoor remodeling project. It's finding the right tools for the right time, but always understanding the bigger picture of the value stream.

You say you have pet peeves: Another one of my pet peeves is move the Muda; it's like a game. I'm going to do this workshop over here so I can get credit for doing my workshop, and I'm just going to move all the waste back on that team over there because it's not in my scope of the project. You've got to understand also the overall context of the value stream and how you make your improvements.

Joe: What would you then warn someone about before they would attempt Lean?

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Natalie: I wouldn't say maybe warn. I would say advise them. That is to find a project that will have an impact on your customer if you improve. Two, get the leadership on board and get their support. Have your idea of the first place you'd want to start, have an idea. If you've read the whole book, then you might have an idea of what tools might be appropriate for that project and the scope of the project, and get your leadership onboard. If you just want to start in your own work area, start small. Maybe it's something that will help you to be able to do your work more effectively. Workplace organization is a good place to start.

I have a home office, and it's kind of funny because if I start abusing the systems that I have in place of not following them, it's amazing how much time you waste looking for things. It's not where you expect it. We're all human. There is no Lean robot perfection, so there'll be times that you put something in place and then you, yourself, don't have the discipline to follow-up. Then when you don't follow it and you waste a lot of time looking for something. Let's talk about your keys. How many times do people lay their keys down somewhere and then can't find them? As a matter of fact, there's a kind of funny little spaghetti diagram in the book around, where the heck did I put my keys? There's tracing the path looking for them.

I would say, to succinctly say that, start small. Start with a place that can affect your abilities to deliver to your customer. Get your leadership onboard. Get the ear of someone in leadership, and try a pilot.

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The other thing I think is advising companies to avoid the big launch event. It's almost like that sets a company up for failure because people expected then, "When are we going to get there?" Like kids going on a destination, "Are we there yet? Are we there yet? Are we there yet?" Then you lose momentum because you've put this big, 'Yahoo. We're going Lean' banner. I am kind of a supporter of stealth.

Start talking about in your strategy, where can it fit; a leadership decision to move the direction. What does it mean on building capability, serving the customer, and understanding value streams? Then just start with projects and start with behaviors. Train as you go, don't just send a bunch of people to Lean classes to get Lean certified, as we've already talked about, when, in fact, they don't have a project that they're going to immediately implement.

Joe: one thing you say that makes sense to me and everybody else that has been successful at Lean that I've talked to; I can't think of one of them that didn't chime in on this. They say when they look back on implementing Lean, they wished they would have tried less, rather than did more.

Natalie: It's interesting. My next project is a book on Lean construction with another consultant out of the UK. We had decided before we wrote the book that we thought the community needed that we would talk to some of the early pioneers of Lean construction. Again, Lean construction kind of refines it. It's Lean in capital building projects. One of the questions; what are three things you wished

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you'd have known when you started? For the most part, some of the answers we're getting are the fact that it is a journey; it's a long-term change, the importance of bringing people with you, and the importance of connecting it to this company strategy.

Joe: It is something you take your baby steps, right?

Natalie: Yeah. We're always looking for silver bullet quick-fixes. You can apply it in a turnaround situation. I am of the belief that Lean is not a quick-fix bullet, so if you implement 3 projects this quarter, don't expect the bottom line to completely reverse its course if it's on a downward trend.

The other thing that I think is important for people to understand is we are so results-focused, and "Did we get the quarterly results?" You have to absolutely measure results, but you can get results a lot of different ways. Inventory in the traditional accounting system is considered an asset, so if you need your balance sheet to look a little better, buy a bunch of stuff. That, in fact, might be inventory that you're writing off 2 or 3 quarters down the road because it was obsolete, it got damaged, or whatever. Lean also, when you start leading from a Lean perspective, you're caring about how the results are obtained just as much as you're caring about the results themselves.

Joe: What's upcoming for you, Natalie?

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Natalie: I mentioned earlier the Lean construction book; we hope to have that finished this year. I'm in the process of rebranding my company. Right now, I refer your listeners go to my iEmerge website; they will find my executive coaching. My new rebrand is called "The Blair David Company". Hopefully, the site will be up by the end of February, at least a limited site. That will have not only the executive coaching with a global focus, but also the Lean practice and customized facilitated solutions, which are something that I love to do. I did an interesting job the other week for a marketing team that was a team trying to incorporate new team members. We did a day of teambuilding best practice and a day of case studies and identifying, essentially value stream mapping their process; again, that beautiful mix of people and process.

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

Natalie: You can find me on LinkedIn, Natalie Sayer. You can contact me through LinkedIn, or you can go to my current website, which is [www.i-Emerge.com](http://www.i-Emerge.com).

Joe: I would like to thank you very much for your time and I look forward to having further conversation with you another time. This podcast will be available at Business901 blog site and the Business901 iTunes Store. Thanks again, Natalie

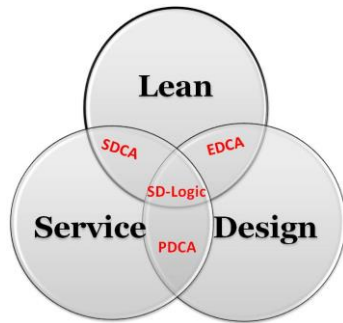
Natalie: Thank you, Joe.

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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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