

# *Business901*

*Podcast Transcription*

*Implementing Lean Marketing Systems*

## Stories of Lean and Agile

Guest was Claudio Perrone aka the Agile Sensei

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## Implementing Lean Marketing Systems



Claudio, aka [Agile Sensei](#), is an independent Lean & Agile software development consultant, public speaker and dramatic storytelling journeyman. Currently based in Dublin (Ireland), he offers vital transformational

leadership and management experience to help individuals and organizations achieve phenomenal improvements. His current work on Lean Enterprise Architecture is set to enable tighter strategy alignment and collaboration between business and IT in service organizations.

He is co-founder of the Dublin Alt.NET user group and board member of the Irish chapter of the International Association of Software Architects (IASA). In his career, he has been driving the design and development of several large-scale solutions for global companies in the fields of e-learning, e-commerce, manufacturing and automation.



He is co-author of the official Italian translation of the [Agile Manifesto](#) and a guest author on Jimmy Nilsson's [Applying Domain-Driven Design and Patterns](#).

Claudio also has a couple of outstanding slide decks that have received tens of thousands of views on Slideshare: The [rise of the Lean Machine](#) and [Crafting Outstanding Presentations - Storytelling Techniques](#).

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## Implementing Lean Marketing Systems

**Joe:** Welcome, everyone! This is Joe Dager, the host of the Business 901 Podcast. With me today is Claudio Perrone a.k.a. Agile Sensei and he is an independent Lean and Agile software development consultant, public speaker and a dramatic storytelling journeyman. I first ran into Claudio with his presentations on the "Rise of the Lean Machine" and another one of his presentations on Slideshare called "Outstanding Presentations." He is currently based in Dublin, Ireland. He offers Transformational Leadership and Management experience to help individuals and organizations achieve phenomenal improvements. Claudio, how do you actually achieve the phenomenal improvement?

**Claudio:** Thanks so much actually for having me in your podcast. How do I do it? Well, I guess maybe going back to what I've done before. I was a CTO for a number of years of Watt in Ireland that was in 2005 was the New Irish Company of the Year. So, it's all about leadership and using methodologies to processes, ideas to align, maybe particular strategies. As usual, it's about creating a purpose and then creates a system that helps people to thrive.

**Joe:** Well, you specialize in Lean enterprise architecture. So, it's really about Scrum and XP, Agile and now Kanban. That's where you specialize in?

**Claudio:** Those are some of the methodologies tools, practices, and principals. On the Lean Enterprise architecture is something that I somewhat discovered much more recently where I had to pretty much face problems of excessive specialization which led to really a zero visibility across the various departments in the organizations. I created the kind of Enterprise architecture, this vertical slice of giving us upshots and then apply things like value stream mapping on top of that. It's interesting because you create then common goals for different departments, so you start seeing where Kanban can be applied and not totally on the

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service side, but you can apply it on the software development side.

Then suddenly people within the organization use the same tools. So, it's really impressive what can happen out of that.

**Joe:** You just recently participated in a Lean Summit or a Lean Agile Summit, did you not?

**Claudio:** It was the Lean and Kanban 2010. To date, the largest conference, certainly in Europe for software development. I just feel like this is a community, in the software community side, particularly with the outstanding work of David Anderson on applying Kanban in software developments and of course with principals and Lean thinking of Mary Poppendick. The community is growing, particularly on the agile side. We're seeing that perhaps we committed too early to imposing sometimes into organizations' certain processes or methodologies, I'm using the terms pretty loosely here but you have mandates that from now on, you need to apply Scrum for the entire organization.

Obviously there are big issues on doing that, so what we rather prefer to think in terms, and we're definitely trying to reorganize our thoughts around that, is to say "Well, wait a second. Maybe we can apply Kanban principals and Kanban mechanics and methods to establish change, organizational change but in a way that is more revolutionary."

So the things that you ask are what is your existing process? How do you do things right now? Let's take a snapshot of how you're doing things." And then by limiting working progress and measuring and doing a number of things, you improve the ability of these things to deliver software more frequently or a better quality.

So, more than anything else, is a way to, I'd say, is an improvement, you know, a process improvement, if you want.

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With an emphasis on the improvement side, of using, sorry, tools like Kanban and so on.

**Joe:** I find it interesting that as you see these things develop, such as Kanban and Scrum, we like to talk about the tools. We gather around the tools and do that and then Agile now, in recent talks with a few other people, they've talked how that's more the umbrella, more the cultural things, isn't it?

**Claudio:** Oh, absolutely! Joe, probably you don't know but I'm actually one of the co-translators, if you want, of the official Italian translation of the Agile Manifesto, right? So, the Agile Manifesto is a document that was compiled about 12 years ago. It is pretty much a statement of a direction where this umbrella you've been talking about effectively. Now there is sort of "Let's go back to basics, what we were trying to do back then or what the founders, I guess, were trying to do back then." And then, you talk about tools but it's like ... Recently I've been introduced to a team whose responsibility, in a large organization is to introduce innovation. What I think is a cool job to have, I guess.

We ended up talking about A3 thinking, for example. But it quickly turned out in the A3 report, you know what I mean? There is a difference between the tools and the deliverables. That is completely different from the thinking. That is a change of mindset that is hard to work on and in many cases is hard for people to grasp.

**Joe:** One of the things I always find interesting is that you start learning about something through the tools. It's the way to be introduced to them, it seems. Then you turn around, and to really appreciate the full use of the tools, it has to develop into something bigger than that. That's the culture side of it and as you said, and then it is able to spread into other parts of the organization or manifest itself larger in the organization to be able to get the full utilization out of it.

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**Claudio:** Absolutely. I completely agree with you. In fact, you probably heard of the Dreyfus model of skills acquisition. It essentially is a model to explain how when we learn new things we go through stages. It is not that we just fill our hats with information. We go through different stages. You go from the novice to advanced beginner to proficient, and then you become an expert. There are five levels. The point being is that at different stages you need different things. If you are a complete novice, you really don't want to learn. What you want is a recipe, some prepared information, so a tool in that sense is very useful, or somebody who really gives a very prospective set of procedures to follow. What happens is it all falls down because most of these rules are dependent on context. We need to change and adapt based on what we are facing, and everybody's work is different. That's where sometimes principles or the help of somebody else could help a lot more to quickly become more effective.

**Joe:** When you talked about lean tools such as Kanban and Value Stream Mapping and you talked about really enabling them in the operational concept of them, but you also talked about innovation and enabling the non-disruptive change with these tools. Can you kind of expand on that a little bit?

**Claudio:** Kanban in particular pretty much enables evolutionary change management. We are talking about evolution here. It is much, much easier as a consultant to get into the company and win the heart of teams by saying, "listen, I'm not here to threaten you with new rules, new ways of doing things. What I really want is to say 'let's visualize what you are doing right now.'" I think David Anderson in particular talks a lot about this. It's saying it's very hard for people to object to the idea that visualizing what you are doing is a bad thing. Then the next step is to say, "Well, let's limit work in progress." If you agree that maybe you are getting more stuff on your plate than you can actually handle, maybe let's try this then".

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It's evolutionary because when a work in progress limit in a particular stage.... Say you are doing testing and the tester is the bottleneck for whatever reason is stuck. Then the developers were supposed to develop their own software. They cannot pull more stories because their slot is full. That is because the tester can't pull anything because he is stuck and the work in progress limits enforce that. That forces the team to stop right then and have a conversation. What happens? What should we do?

Very often, particularly at the beginning, the first thing people say is "let's increase the limits. The limits are blocking the way we do things and I want to develop more. But, in reality if, you know, with a bit of help if you do respect the limits, the next step is actually to say, "Well why this tester is stuck?" Can myself as a developer help the tester so the first thing you do then is to start trying to see if you can remove some of the obstacles on the tester.

So, what you have is a just in time learning experience, which is something that you don't necessarily have in your normal process, software development process, So that's what I really believe is evolutionary. Because it's not threatening people to completely change the way they are doing things.

**Joe:** I always look at that in most things. It's always figuring where you're at. You know, having that current state and working from there and people have a tendency to sometimes not even understand where they're at. It's an awakening process to build a current state map or to build, as I call it in value stream mapping, is that it's hard for them to sometimes distinguish what they're doing in a step-by-step procedure.

**Claudio:** Oh, clearly. I mean, just to give you an example, what I did on the "Rise of the Lean Machine", that presentation. I talked about a story pretty much in this organization where everyone was really specialized for the nature of the organization.

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You know, if you think in terms of reinsurance, you can imagine that there are a lot of policies and so on, but there were a lot of systems as well. So, it typically what happens when you have organizations of this kind, a new person who joins the company tends to be assigned to a particular project. Essentially, they work in a corner for two years, right? And all they know is their part, and so it's very hard for them to see the big picture.

So in that particular case, I had that problem. I had to help the organization and series of systems that were connected in some way. So the typical software architecture approach is creating some enterprise architecture that takes the picture, a snapshot, if you want of the value systems. How they incorporate, interconnect together. So you have service-oriented architectures.

But that particular approach didn't satisfy me because if you think about -- I remember there was one story of, I think it was in Toyota, I read it somewhere that said pretty much the fresh IT manager went to plant manager and did show a diagram showing how all the various systems connect together.

And the plant manager looked back and said, "You know, here we build cars so you tell me how these systems are supporting the process of building cars."

So, I have a similar approach where I had diagrams that were showing how the systems were connected together, but they had absolutely no meaning because most people didn't see the picture. You know what I mean? Like they didn't know what the system was for and so on.

So what I did was, yes, I created an enterprise architecture, but I started from a different level, which is how does this company make money? What's the main process, or one of the core processes that are used to make money?



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So if you think in terms of reinsurance, you have a customer who's making a request and then, you know, there's a process it goes through. But they're servicing that request by providing a quote.

And this kind of process can take weeks. So I mapped the value stream of this process, and then explained well who supports this process. Let's write the services that are supporting this process, the application services and then what kind of software. What kinds of applications are realizing those services?

You see over time applications change the services a little bit less. And, so on, effectively leaving different levels, and for the infrastructure level as well. Then what I said was, well I remember, you know, the words from Taiichi Ohno about all we're doing is looking at the time. You know, like the typical value stream mapping sentence that you hear all the time is what he said, you know. We're looking from concepts to cash pretty much. We're looking at the timeline and then removing the waste.

So I thought about that, went back to the domain experts and said, "Well how long does it take to do this step? How long does it take to do that step? And how long in between?" And the guy said, "Well I'll come back to you on this. Can I come back to you tomorrow? It's not that I want to make the numbers, I want to collect them and make an honest statement."

So, the interesting thing about this is by doing a current state value stream map at the service level, not so much at the application level, but then having all the various layers so even how the applications are supporting that service, then we started thinking in terms of, "How can our software provide a shorter cycle time in this particular step?"

"Because there are problems here, because there's not enough validation in this part," and so on. Now you have like suddenly an

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alignment of the organization or different departments in the organization to one common goal which was in that case recognizing that a shorter lead time has an amazing competitive advantage for their kind of business effectively. So from then on you use value stream map in current state and then move to the future state where some of the aspects for improvement are perhaps yes applying combine, pool systems, for that to be for the service parts, changing things on the application parts and so on. Suddenly you have the entire organization pulling towards the same direction.

**Joe:** That presentation or a slide show deck that you use, "The Rise of the Lean Machine," was on this particular project?

**Claudio:** It was actually, it was. Yeah, I like to, we didn't talk about stories much but I am pretty picky on how I build my presentations. I truly believe the presentations that most effective presentations that at least I've seen tell stories. We tell stories to each other all the time. I like to take a lot from personal experience I guess and tell stories in a presentation and I use stories as a device to pretty much to put in all the information, all the data that otherwise would be sometimes very dry, you know for the audience. So it's a way to respect the audience. It's really like to tell a story and then in between put all information.

**Joe:** You put a lot of effort into making your presentations very descriptive and very real. How did you go about, how did you start doing that? What drove you to?

**Claudio:** I guess on one side was frustration on watching myself, as well as other presenters being fairly dry. The thing is because we have something that is important to be said doesn't mean that the audience listens to you? So like you know the old story starts from, from years ago. I was working in large company in Italy and I went back to the, I had a week training as

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a presenter at the CERN, the European Center for Nuclear Research, and I was doing automation at the time, realtime automation. So I was there like training fifteen scientists and at the end of the training, they absolutely killed me. They absolutely killed me, right? I was skinned alive pretty much. Ten years later when I made I guess somewhat of a career, I was offered to present at a large conference and my style of presentations I knew was absolutely dreadful so I started doing some research and seeing well what is the state of the art of you know how people deliver PowerPoint presentations.

I learned like methodologies or ideologies if you want, like there is the Presentations Handbook, I don't know if you ever heard of it, but effectively like a lot of presenters nowadays, they talk, what they do is rather than having a lot of bullet points, they move beyond that aspect and they recognize the fact that, you know, if you really have a lot of slides with a lot of text, essentially what you are providing are documents. You know, if you're, if they're there for the load that's fine, but if you have a presenter and if they are sporting a presenter, if they are supporting the idea that the presenter must carry across, and then you may look at different things.

The new wave, the most recent wave has been really following these presentations and concepts where you have more messages and pictures. So, you have all this kind of pictures. My very first presentation I had all this kind of stock imagery and messages. I remember talking to a professional speaker who told me pretty openly, oh yeah I heard about presentations Zen it's about putting a picture of your dog on the slides. He was right, you know like there are a lot of presenters who start talking about themselves, their family, this and that and I don't think people really care. What I really do care about is to be sure that is what I want to put across, goes across. If you want to know about me you will probably find out after my presentation. I think that's the best sign. You know what I mean?

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Anyways I evolved my style with a more logical outline, I put a little bit more structure there because I've been a series of teachers and messages doesn't really work that well, but at least in my opinion. I worked a lot in terms of structure. I started with a logical structure and you will see many people doing something around those lines. You have a main concept at the beginning, the points you want to make and then you have three key points that pretty much supports the main point you made before and then you have the conclusion which is typically a summary of what you said at the beginning.

**Joe:** So when you start with your presentation from the very beginning, the structure, you kind of make a decision tree out of it.

**Claudio:** I mean to me opening, launching power point and putting in images or whatever messages are there, it's the last step in my process. I never go there. What I do first is obviously collect information and do a lot of things like putting in a board I put note, you know, post-its with all the different ideas and I start to cluster them. But then I build a story. What I did before was to create a logical outline as I explained. All this information I have, what is the main point I want to make? What are the three key things I want to talk about and how I'm going to expand them? So this rule of three by three, so you say three things and then maybe you explode them even more and so on. It becomes really like a tree and I was pretty happy with that structure before. It is a logical way of explaining your concepts. Then one day, I watched television and I watched like a movie and, you know, for whatever reason I started crying. I was really emotionally engaged with this movie and I'm not going to say which one it is. Was a chick flick, so which embarrassed me, but it wasn't even the first time I was watching it. At some point, I started thinking, how come that most presentations are logical maybe, but dry and how come I can be so emotionally engaged by watching movies. So I started thinking, you know, I want to

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learn more about this. I want to learn more about storytelling and so on.

You know you can turn it into a what if. What if Spielberg showed up, what would he say? What would he say to our way of presenting things? So anyways I, you know, I started this journey, I guess, and that is why I call myself a romantic story telling journeyman. It is a journey that never ends in many ways. I learned a couple of things and one is what is a good idea for a story for a movie and it is simply this, someone wants something badly and goes after it against great odds.

If you watch a movie tonight, probably you will see that this kind of template works pretty well. Someone is character, wants something badly is desire, against great odds is obstacles. Character, desire and obstacles. This leads to the dramatic question that says will he succeed? Will he or she succeed? So, if we start with this premise, pretty much I can create a presentation. In fact, one of my early presentations was something around those lines. I was a talented software developer. My technical skills made me feel invincible until one day everyone turns against me. My career and self-esteem was put in grave danger by all the IT projects I couldn't run away from.

I created a little trailer, a one-minute trailer around that with horror music and all that kind of stuff. The point being is that in a few seconds I created a hook. You know what I mean? You want to know what happens. What was the project about? Did he succeed?

You know, the first time I created, so I created this one-minute trailer, then I did a presentation. I didn't know too much about story telling at the time. And, in fact, I did one stupid mistake. And, the mistake was during a presentation I said, yes, I faced all this terrible challenges and luckily the project was a success, and

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maybe this is why. And then, I started my three points or whatever.

That was a mistake because of the fact that I immediately told the outcome of that project? So, I released the tension I had just created. So, what I changed that presentation, then, was into rather than say it was a success and maybe this is why, I said this is what I faced and this is what I tried.

At the end the outcome of the presentation was, the outcome of the project, which happened to be a success, was only at the end as a, you know, pretty much as a logical end to what I explained all along.

So, I use pretty much this kind of simple structure to explain things about agility, effective communication and creativity?

So, these are little tricks, little ideas. Why do I care about stories so much? It's because it's about the influence? Very often a lot of your audience, I'm sure, will relate with that.

What we do is we go into organizations and we face any form of resistance or concern and so on. Rather than me trying to say this is the best way of doing things or this is a good way of doing things where people effectively raise a barrier like sweep it away. And, they say well, prove it to me. So, you have this kind of I make a claim and now I have to prove that claim.

With by telling a story, essentially what I say is well, this is what happens, this is the truth, this is absolutely an unbeatable truth because it's my view of what I saw or maybe of what I know that somebody else's did.

Because of that, I'm not trying to change you directly. What I'm just saying is a little story. That story potentially has got, you know, plants the seeds in people to actually potentially learn from

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mistakes that other people have been doing. That's why it's so important.

**Joe:** Well, I always find out, let's say I'm selling something or selling my services or even in my, what I call my past life, selling equipment, I would construct a story to the person about how someone used this or applied this. It always made more sense than showing them anything else and it opened up the communication and the dialogue so much better. It was just a natural flow as a result of it. And, you're saying in your storytelling that's really what you're trying to do, correct?

**Claudio:** Yeah, absolutely. This is something I discovered only afterwards, you know, that is a real incredible, persuasive tool. I didn't realize that. All I wanted to do was to make people cry. Not even that, actually, it was really like to release some type of emotion and make it more interesting. I suddenly realized now wait, hold a second, hold on a second, I can tell a story. I can tell a story coming back to my experience. I can tell a story about other people who did this work before me. I can even make up a story by saying simply what if, you know, what if it's so beautiful because you create pretty much a possibility and then you elaborate around that possibility.

It's very quick how people lower their barriers. It's like those barriers weren't there in the first place.

**Joe:** Let's say I'm an engineer, I'm a consultant, and I'm an IT guy. How do I go about telling a story? If I'm an introvert, can I use your process or do I just have to have a natural ability like you do?

**Claudio:** This is a great question actually because a lot of people tell me; I'm not a storyteller. But then actually, if you listen to each other, we tell anecdotes all the time, we tell little stories all the time. We do tell stories to each other. The point being is I'm an engineer, I'm very logical. Tell me, how do I start one of these

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dramatic stories? I think there is a very simple idea. I came up with, in a moment of lucidity that I will never find again I guess, but it's this one, right?

Say you have an idea, a product or two, a process, whatever. Your goal is to create a story so that you convince somebody else, right? We need to create those dramatic stories where, as I said, someone wants something badly and goes after it against great odds.

We need to create obstacles and so on. One idea, even for creating basic scenarios to start with, is to say let's create a list of all the features of my product, if we're taking a product, the attributes of a product. You look out what you really want is a list of the benefits? That could be an idea, a service and so on.

Benefits now differently from the attributes from the features of a product are really specific to the audience, whomever you are talking to. Actually I have a pen in my hands right now. If I take this pen in front of me, attributes of a pen would be the color, the make, and so on. But, the benefit to me as a writer is probably different from the benefits than a student would have and then a poet would have.

They are completely different from the benefits from the investor who puts money in the company that produced this pen for us. So, benefits are really, really focused to the audience you are talking to. This is mistake number one when we do presentations is that sometimes we pitch to the wrong audience? Having said that, once you have this list of very explicit benefits, you write another list and that list is the opposite. If the pen can allow you to write beautiful poetry, to give that analogy, then you write the opposite. You can't write beautiful poetry.

If value stream mapping allows you to visualize what you are currently doing, then you cannot visualize what you are currently doing, and so on. You know what I mean? Or, if Kanban allows



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you to have something that enables continues improvement, you don't have improvement, and you don't have a mechanism for improvement.

**Joe:** It sounds to me something like why go back to theory of constraints, the evaporating cloud. Are you familiar with that?

**Claudio:** Yes. I guess it would be. I guess it would be. The point being if you write a list of the opposite of the benefits that your idea or process or tool or whatever provides, then now you have a list with one or more potential elements for creating your starting point for a story because, you know, how do you create the story that puts your technology under the best possible light? Well, you start from the worst possible situation

So, that to me-- And now, interesting enough, when you look back into your own experience, you will find out that you find situations like that very often. It's just; perhaps, you didn't have a tool to actually help you out to say, "Well, what story should I tell? How should I tell it?" I think it's a very simple, but interesting way to start. I absolutely love reversals all the time. One of the key aspects of Stories is really that, while you're telling all these obstacles, we all grow. OK?

There is a transformation of the main character. There is a transformation of what happens. There is some insight in the end. So, that's really the approach.

**Joe:** You're saying that anybody could do that because you're telling stories all the time in conversation during the day. They just freeze up and don't present their natural way of telling a story to people.

**Claudio:** I've been reading pretty much screenwriting books. I'm a speed reader. So, I can read books really, really fast. Which is a capability you learn? It's not something that I had in me. But, the point being is I became so interested in this. And I started

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reading 10, 20, 50, 60, 100s and God knows how many books, on screenwriting. And then creative nonfiction, which is pretty much using screenwriting techniques, creating novel writing techniques on top of real Sensei to create those kind of editorial journalistic articles that win Pulitzer Prizes pretty much for the last 20 years.

That's the type of stuff that I've been studying and learning. Obviously, at some point I codified some rules. And then, you go by instincts after all.

But anyway, one of the presentations that you did mention, the Crafting Outstanding Presentations, provides pretty much a framework that I used for a long time. I keep using them, in fact. But, I think it's very usable by others as well. Now Sensei really explains, in the very basic ways, as a simple process for building some stories.

**Joe:** You actually have a seven-step process on that.

**Claudio:** Yeah. That's right. Yes. And funny enough actually, I was on the phone with a friend of mine in South Africa and he was writing a presentation right then. I was doing my own presentation. But anyways, he sends me this question, "You know I'm building this presentation and do you have any tapes and ideas?"

I was under pressure to do my own and I was saying, "Well, I don't know but I'll tell you what, this is what I do. I do step #1 is this, step #2 is this, step #3." Then at the end of that I thought, oh, this is a seven-step process. I'll just call it a seven-step process.

Interesting enough, the presentation I was doing was actually that presentation, "Crafting Outstanding Presentations." I was really thinking, how I am going to explain the methodology, the tools that I use and so on. And funny enough, people still come back to me saying, "Oh, I loved your seven-step process."

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If they only knew I just made it up.

**Joe:** Well, I don't think you made it up. I mean, it's something that's evolved over a lot of years.

**Claudio:** What I'm saying is I made it up in terms of the name if you want. It just came out of pressure. Sometimes you need that line to get some results.

**Joe:** Is there lean tools involved in this process, when you develop them?

**Claudio:** Interestingly enough, when I'm really under pressure, which is pretty much all the time I do presentations, I use a personal Kanban. So in fact, I literally have a very basic to do, doing, don't with a limited working in progress with one, pretty much. So, I literally take a backlog of potential slides or ideas that I want to develop. Then I go through this simple workflow to just pull that through. I also use a 48 minutes rule, which is pretty much, have you ever heard of the Pomodoro technique?

**Joe:** Yes, just recently and I haven't been to the store to get my tomato yet, OK?

**Claudio:** Oh, yeah, very good. Well, you see, Pomodoro is actually an Italian word for tomato, all right? It's tomato technique, Pomodoro technique. An Italian guy invented it. But, the technique, pretty much, is a very engineeristic way of pretty much something that I believe is pretty simple which is creating time boxes as we do with methodologies like with processes like Scrum and the classic first generation agile method methodologies where, in fact, have fixed timeboxes. And, I think what happens is Pomodoro technique usually I think it's 25 minutes and then two or three minutes, and then 25 minutes where the idea is you focus your time for 25 minutes and then you take a really short break and then you begin again for another 25. Prior to that, you write a list of things you wanted to

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do for the day, there's a little bit of pre-planning then focus, focus, focus.

I do exactly the same only my time box is 48 minutes. Simple because I use it to do 48 minutes and then 12 minutes of break. What happens with that is that pretty much I can go all day long in a very focused mindset and just crunch in a lot of work, pretty much, by doing this.

So, it's strictly is not lean. It is definitely agile. But, so use, as I say, Kanban to organize, prioritize the work and do one piece flow if you want, and then 48 minutes techniques to actually complete the work.

**Joe:** I found both of them kind of complimentary and interesting. You bring up a point, and back away from the storytelling side to the lean side and the agile methods. Is Kanban replacing Scrum then as the ideal method?

**Claudio:** No, actually. And, I must say just last year I made a statement on Twitter and maybe I should make another statement saying I was wrong. Last year pretty much said for me Scrum is dead. This was when I was using Kanban a number of times and so on. What I realized was a couple of things. One is that Kanban can absolutely be used. I knew that before but I just didn't acknowledge that it can be used on top of Scrum, limiting work in progress can be done on what you're currently doing, and visualizing the work can be done on top of what you're currently doing. If you are doing Scrum, well you're still doing Scrum.

If you are very descriptive on how you describe Scrum and everything that deviates from that in terms of you have to have one to four weeks iterations, and if you deviate from that, then you may be considered one of those Kanbans, pretty much. You know one of those people who actually don't follow the prescription.

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But, I changed my perspective at this point and in the end agile means delivering frequently, having better quality of work, enjoying what you're doing, continuous improvements. Everything that tells you to continuously improve to me helps.

If Kanban is the mechanism that on top of Scrum or any other methodologies, including XP, rational unified process, Waterfall, any other methodology, allows you to continuously improve, then it is a good thing. In that sense, it does not replace but it extends.

**Joe:** What we're talking about is that we go back to Agile being the umbrella, and then Scrum and Kanban and others. But you can use all these different methodologies really in combination if you would like. It's really what you develop and what tools you're comfortable with that fit your situation.

**Claudio:** Particularly the situation I think is the most important thing, right? There are situations where having a heavy iterative process, I mean time boxing in particular, not so much the iteration but the time boxing aspect is just not applicable because of the amount of interruptions that you get every day. There are a number of teams that don't even do software developments, but they apply Kanbanic pooled methods very easily, essentially, on top of what they're currently doing. That's saying that nothing can be detrimental more than limiting yourself to one single tool. We have different situations; we face different situations all the time. What I find is that having Kanban on my pocket means pretty much that I have an extra idea or an extra element that I can use.

**Joe:** Do you think Kanban has allowed the Agile Methodology to move and become...move out of just software development, move into bigger fields?

**Claudio:** Well it's certainly happening in my own experience, no doubt about that. Before at least, again this my own personal

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experience, is that by practicing software development practices, you cannot focus on the team, on your team or maybe another team. Then you have this problem of scaling various teams together, and how you deal with that and so on. But generally wise to me is being a very, very team-centered approach. But start using Kanban; I learned a couple of lessons, another mistake I made, for example, was to believe that maybe the community, the Lean-Agile community, particularly the Kanban group and so on. Was focusing on, too much on Kanban as saying, well there is a lot more to learn, right? There is Lean, how about this Lean stuff, how about lessons from Toyota and so on. That kind of failed, are we only cherry picking one to on top of everything else? I did believe that, I absolutely... in some way I still believe it. But what happened lately was actually to realize that the Kanban really enables us to do this continuous improvement, which does allow you to... to reach into more Lean thinking then you would otherwise. So it's kind of a way to kick start a Lean transformation.

I am not saying it's sufficient, by any means at all.

**Joe:** I don't think it is sufficient. But I think it's interesting because as we look at software development, we'll look at Agile, and then we look at the development of it with XP and Scrum. It was in the software community, but it was foreign to others; manufactures or service industries. I mean, I am not going to involve service industry in time box iterations.

Now that I have Kanban on the table, it seems people go, "yeah this is a nice introduction", and "yes the iterative of process starts making sense to me."

**Claudio:** Well, I mean it's interesting enough that you don't need... I mean Kanban is about... iteration fewer developments. I mean if you want to do iteration-less developments, you can keep doing iterations again if they are on top of Scrum if you want to.

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So you're not constrained right by that aspect. There are two approaches that I see that work really, really well, I had a conversation a couple of years ago when a guy I never met before, but he said pretty much they had some Lean program on the shop floor. He knew about Agile, but he really couldn't make the connection, between what happens on the shop floor in a manufacturing company and what happens on the software side. Just there was no Lean, and I think that happens pretty, pretty often, where you have maybe some Lean program at some level, maybe at service level.

I think what is interesting now that is kind of involving, is the fact that, well wait a second, if I... I can use two approaches if there is a Lean program already in place then it means that the management that I am talking to knows about Lean. So they will know about Kanban, so I can explicitly tell, you know, more about the origin of Kanban and then the adaptation and software development.

It's a good approach to actually take that aspect. Then you're talking about Lean principles and so on. But another approach is to actually say, which maybe the more bottom-up approach, is to say, "Well, I'm not even name it as Kanban. What I'm saying is I go there to the team and say, tell me what to do and let's limit work in progress, and let's see how it works." You know what I mean.

So, you evolve, without necessarily pushing people into principles that are absolutely valid as principles. But the risk is sometimes that by talking about the origins of that, and saying "Well, it comes from manufacturing," then people say "Yeah, but software is this for manufacturing. Yes, I know it's different from manufacturing. There's a lot more variation, the type of problems that we need to solve are different."

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That's true. We have a modified version of the same concepts, which actually deals with variation very, very well. You know what, what you will learn is that some of the tools and ideas that are emergent from the software side will become very, very relevant in the next few years, months, or whatever, even on the service industry and manufacturing. I'm 100% sure about that.

**Joe:** I believe that's true too. I see it more and more, and I'm seeing people talking about it, and how it flows into that community will be interesting. It's on the edge of it now. As I always talk about, finding that path of least resistance and how it's going to go to the core will be interesting to see.

**Claudio:** We're really at the edge. In fact, I'm starting collaboration with a couple of Lean Six Sigma black belts as it turns out, exactly for that reason. Because they have a lot more experience than we do on the software side on certain aspects of service and manufacturing. There's no doubt about that. So why not learn from each other? So there are big, big chances that my customers are your customers, and vice versa. They need to solve different problems on different levels, you know what I mean?

That's how Value Stream mapping, that's how Kanban on both sides, that's how, you know, the work I've been doing, which has been kind of a realization in terms of Lean enterprise architecture. Using this architecture, literally physically connect the two worlds: service at the top to the process at the top and the business process at the top to the applications and workflow of teams that are building those applications at the bottom.

**Joe:** Claudio, what's on the horizon for you?

**Claudio:** What's on the horizon... at the moment I'm involved in doing pretty much Lean and Agile transformations. There're kind of interesting things coming up as well though. The presentation I did about crafting outstanding presentations, which is not the rise



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of the Lean machine, but was the first one that I did that, explained all these methodologies in terms of creating stories and so on. It really caught the attention of a lot of entrepreneurs and managers. So, I'm not 100% sure what's happening there, but I'll tell you a couple of things. I've been involved in projects where, in particular, one project could not fail, not so much from the operational point of view, but actually from the idea of actually saying "We need to sell this idea to different countries in the world, to different governments in the world." So, you can imagine having these big projects that have maybe several months, if not years, of work that just cannot fail.

So, these guys started calling me for some consultancy on literally, "How can I do these presentations? Can you help me on that?" And of course, if there's enough at stake, then there is a point on investing a bit of time and effort to build something that makes sense, you know what I mean?

**Joe:** Exactly. I'm always amazed at people who will spend so little time on the presentation and how important the presentation may be to them.

**Claudio:** Oh, yeah. A presentation can literally make or break an idea. If we take presentations not so much as a sequence of slides, or things that we want to cram into the audience, but of something that we want to use to influence others, then maybe we need to rethink about how we do all these things. This kind of screenwriting is sort of becoming a hobby, if you want, that is maybe becoming a profession, and I'm not sure about that yet. Certainly, I'm enjoying all these transformations and also having, you know, using things like registry map to really make clear either the type of either savings or the type of continuous improvements that companies can have.

I love to witness that continuous improvement. I love to witness teams, as well. Start saying: "Hold on, what is the board telling

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us"? Once they're blocked, maybe, for whatever reason. I try to maintain that kind of Socratic teaching, right? Where you don't tell the answers, you let them struggle themselves, I guess, and find the issues by themselves and have them go and find the root causalities for identifying the root cause of their problems. This is really what I like, I guess.

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

**Claudio:** You can find me at [claudio@agilesensei.com](mailto:claudio@agilesensei.com). You can certainly contact me on the website, as well. I live in Ireland. I know my accent is not Irish at all, I'm Italian. I moved here 11 years ago. I travel anyway, so if you want to get a hold of me, definitely send me an email and I will definitely answer that. You can also reach me on the phone, of course. It's an Irish phone number 353-86-775-9223.

**Joe:** You're also on Twitter, correct?

**Claudio:** I am on Twitter under the moniker agilesensei. In fact, I'm a much more frequent user of Twitter than I am on blogging, and so on.

**Joe:** I'd like to thank you very much. It was a delightful conversation. I enjoyed it. It was a nice story told.

**Claudio:** Thanks very much, Joe, and thanks to everybody for listening. Thank you very much.

**Claudio:** Yeah, yeah. One thing I just realized, we didn't even mention, it's not that important anyway, I drew all those images on the "Rise of the Lean Machine".

Actually, I wrote a blog post on that. If you just look on [agilesensei.com/blog](http://agilesensei.com/blog) you will find the latest post. It's actually about the making of "The Rise of the Lean Machine". It just appeared from my head when you were asking me questions. For a long time, all my focus was on the structure of the story, to

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make sure that the story is sound. You don't have a story until, I don't have a presentation until I have a story, the outline of the story, and I know how it resolves and all that kind of stuff. Maybe you should record this piece, I guess. The point being, in "The Rise of the Lean Machine", instead, I didn't follow my own process in many ways. I tried to, but I just didn't. And in hindsight, I guess I used the Toyota principle of standardized work, or standard as a baseline for further improvements. You have to try new things to improve over time. In that particular case, what I did was a little throw-in, which I put on Flickr. It's on my Flickr account, you will see it, and "It was a dark night in Dublin".

Doing that took me two days. I realized I cannot do the presentation for the conference in two days. I think I was three weeks ahead, but I was going on holiday for one week. There was no way I could make it. In that particular case, though, it would really hard to be through in two days. I started writing notes about it, doing more drawings, and so on. At the end of the first week, actually I did it on holiday, I had a lot of just pen and pencil drawings, and I said "Maybe I can make it." Back home I started painting everything like mad. At that point, indeed, I used the Kanban system; indeed, I used the 48-minute rule. I didn't sleep, pretty much, to get there in time.

The focus was much more on the visual aspects of the presentation rather than the structure of the story. I just had the story in terms of what happened I had a bunch of events. Then it was all images. You have this image of the guy in front of the building; everything burning pretty much, that was my starting point, the hook, if you want. I think this applies to, I mean it's not just the Disney storyboards; it's absolutely everything, every business. If you think about it, at some point, you have to sell something. I'm not saying selling has to be through slides in a slideshow or even a physical presentation, and so on. The key aspect is, you may love the visual aspects of what you see, but

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there's something behind it that is more important. People don't realize how critical that is. Years ago I used to be fairly annoyed, I must say, not annoyed but just disappointed, maybe. People would look at my slides - not illustrated, this is the first time I did everything illustrated in this way, I didn't even know I had it in me - they would look at the pictures and say "You know, Claudio, where did you get those pictures? They're fantastic". And my answer was "I get the pictures where everybody else gets them". If you know about stock photo websites like istockphoto.com, I get them there. I used to get them there. So they're exactly the same source.

Now obviously, you do have to spend the time to find the right method for it and all those kind of things and that becomes hard. But I was kind of disheartened by the aspect that people don't understand the amount of work that goes behind any presentation if you want to do a decent job, I guess. That may be, it is an obstacle on doing this on a professional level.

A lot of people tell me "Oh, but I need the bullet points, I need all that text, because I need it to support myself, to remember what I said, what I need to say". I do the same, but I do it through images. And through the fact that I construct the messages and the sentences so that maybe you have a full sentence, or you have the beginning of a sentence which you resolve maybe on the following slide. You create this kind of flow. There is always an action and then a reaction to that, and then what happens afterwards that really helps the entire flow.

# Business901

Podcast Transcription

Implementing Lean Marketing Systems



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