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Podcast Transcription

Implementing Lean Marketing Systems

Developing a Learning A3

Guest was Matt Wrye

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Matt Wrye is a Lean Implementer that has a passion for continuous learning on all subjects related to business and lean. He is the author of the popular blog "[Beyond Lean](#)," which centers on evolving leadership and changing business.

Matt has a Bachelor of Science degree from Purdue University in Industrial Engineering. Among his other accomplishments are Lean Principles and Kaizen Certification from Lean Learning Center, Lean Coach/Mentor, Proficient in Lean tools and concepts, Shainin Red X Certified Journey and Master Candidate, and a ProModel Simulation Software expert. He is proud to have played a large and significant role in starting the Smith County Lean Consortium in Tyler, TX.



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Transcription of the Podcast.

Joe Dager: Welcome, everyone. This is Joe Dager, the host of Business901 podcast. With me today is Matt Wrye. Matt is a lean implementer that has a passion for continuous learning on all subjects related to business and lean. He has been a site lean leader executing strategies to improve the business. He is the author of the popular blog "Beyond Lean," which centers on evolving leadership and changing business. Matt, I would like to welcome you. Could you fill in a few of the blanks in that introduction?

Matt Wrye: Thanks Joe. It's an honor to be on here with all the people that you've had on the podcast in the past. Right now, I work for a company; our role is a member of a group that is helping the business transform to a lean business model. It's a large company, and we do everything from creative art and design to product design through manufacturing and distribution. It's a wide range.

My background has included work from HVAC, consumer goods, consumer electronics, metals. Where I got my biggest lean experience was as an automotive supplier back in the early 2000s. So quite a range, moved around quite a bit, and I have enjoyed it a lot.

My degree is in industrial engineering, which has always had that improvement, or doing-things-right kind of focus. When I was in automotive and started working with Toyota and Nissan and some of the other companies, as we were going down our lean transformation path in our facility, it really stuck and hit home with me and continued it ever since. I've met a lot of people and done a lot of things that help continue to grow my learning and everything from day to day.

Joe: Matt, you're pretty active with your blog. How often do you post on it?

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Matt: Yes, I started a blog about two years ago and my goal for the first year was three posts a week, just to try to keep it fresh and keep ideas coming out there. I did that for a couple of reasons. One, having an engineering background, my writing skills are not all that good, or at least I felt they weren't that good. So, I wanted to improve my written communication aspect.

That's writing and learning how to get my message out there in a short and concise way was a goal. Earlier this year I added another author to the site, Joe Wilson. By adding him, there are now four posts a week. I do two and Joe does two posts a week. So we keep the content going out and fresh weekly.

The blog has been a great way to meet new people too, and just my network and learning has grown immensely just from meeting other bloggers out there and learning what they're doing. People who may not be blogging, having conversations off to the side, and it really helps incorporate some new ideas and stuff into my work.

Joe: I think you've done a great job, and I think it's one of the more popular lean blogs out there. One of the things that caught my eye recently was your "learning A3" post, where you took an A3 and started laying it out for a standard method of learning. That really intrigued me. What caused you to do that?

Matt: Well, with the group I'm working with, we were using A3s and implementing A3s within our group on all kinds of communications of how we work with our clients, writing up the work that we're doing with our clients. One of the colleagues I work with said that she had done them before from a learning standpoint.

So not only is this the business result that we want out of going from this current state to this future state but these are the learning results we want from moving from one current state to the new future state.

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I'm engaged with an organization where, not only am I trying to help them set up their business strategy for the year, and move towards goals. One of our people goals is to take four people within that organization and develop them to lean leaders. So, at some point when I withdraw from that organization, they can continue to run with it and stand on their own.

When my colleague had mentioned how to use an A3 for learning it just kind of clicked with me and said, hey, let's try this for these people that I'm coaching and teaching. That way we can set goals, we have a format of knowing what we want to accomplish. And we can measure that progress to whether we're getting where we were hoping to go by the end of the year.

Joe: Why create an A3? Why not just a checklist on a piece of paper in a file folder?

Matt: The A3 format, as we were trying to roll this out company-wide to help people communicate better across our company on the work that needs to be done and having high agreement of not just what to do but how to do it, just put that thought process that we were doing.

You know we kept saying, hey, it can be used for everything. The A3 format is just a format to create discussion, to show where we are and where we want to go and tell a story as we get there, a concise story. Though part of it was, let's use this tool. It's something for me to learn and see if it can fit in that format.

Number two is, in our group we keep saying, hey, we got to walk the walk. We can't just ask people to do it. We got to show them how we're doing it too for different things. I was lucky enough to have three or four people that I'm working with to help them learn about lean that were willing to say, yes, let's give this a shot.

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In fact one lady, just the other day, said, "Hey I'm so glad you did this, because this helps me keep an eye on things and where I want to go and what we want to do with all this." It was something that she could hang, and it's just a reminder for her, OK, I need to help complete this, I said I would do it by this time. Let's do that and keep it focused and working on it.

Joe: It's not exactly like your typical A3, where the left-hand side is the plan, and the right-hand side is the do-check-act. You formatted it slightly differently. Can you try to explain it and why you used the blocks that you did?

Matt: The basic thing is we want to always understand our current state and then our future state, so where we're at and where we want to be. That's, for the most part, the top half of the sheet and so that way we can draw out bullet-points, where we're at and have that conversation beforehand.

It's really effective when trying to set up something for like even a kaizen event. You know, even a kaizen event, it's very easy to determine where we're and where we want to be but what we tend to forget to do a lot, is say, during this kaizen event we want the members and the team members, participants to walk out learning something about lean.

It may be just one or two small things, it's not an overall course or anything like that, but if they can just start to get a handle on a couple of the principles or rules of lean that we're implementing then that would be a win. We're starting to spread that word across. So that's what we do up there, is just kind of getting, I'll say, the plan of where we're at and where we want to be.

The bottom half is more tactical. What is it from a learning standpoint that we want them to learn, what is the specific concept or principle or tool or whatever it may be. Then what are the behaviors we want them to exhibit with this concept? What is

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it that we really want them to see? If we went and watched them, what would we see differently?

We have a target that we want to set, where do we want them to be by the end of the year as far as understanding. We sit down and have a conversation to say, where do you believe you're at on this continuum? So we put that in where the actual is.

Then the last part of it is creating a time, or the action items -- how we're going to accomplish getting from where they believe they're at to the target condition and then a timeline. So it becomes that plan part. Instead of doing it left to right, we just kind of did it straight down instead of left to right.

Joe: I noticed that, I thought that was very good. One of the things that you did not mention in starting out is that the first step in your A3 was that you put a block in there -- the learning needed related to a business need.

Which I think so many times we kind of forget about because we think just generically - oh we learn about 5s or we learn about some other lean practice is going to help us but tying it to a business need is pretty important, isn't it?

Matt: Yes it is, and actually I mean just having that box brought it to the forefront of my mind and made it a more conscious effort, especially in something like a kaizen event or problem-solving team or anything like that that says, so here's the business need. Let's say it's a problem-solving team. Well, from a learning standpoint, two things I may want them to walk away from are understanding the PDCA process and the behavior or the principles directly observing work.

During that problem-solving exercise and that team, as we're going through the project, can always lay out things and how we're going to do that and be able to see if people are moving and starting to click with those two things.

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Whereas before, I would say it was more subconscious. You know, not that I didn't want them to learn, I always figured, yeah, they're learning it, we're going through it but now it becomes more conscious and we can have that concentrated conversation around it as opposed to just having that unspoken conversation and you just assuming that that's what's happening.

Joe: When you start out with a current condition, is that something that's related to the person or is this used more as a group process, the current condition of where everybody is at?

Matt: It's both. It kind of depends on how you're going to use the learning A3. So for a problem-solving team, or let's say you are doing a kaizen event team, then that's probably going to be more around the team and where they're at.

But if you are doing some kind of one-on-one coaching or teaching then that current state would be more around where that particular person is at. It would just depend on the usage of the A3.

Joe: Did you make it very visual when you did it? I know you didn't share the actual A3 that would be somewhat proprietary, I would think. But did you make that visual or did you just break it out in paragraphs?

Matt: I've done both. Actually a skill I'm working on because I'm used to thinking in bullet-point format. I'm working on how do I take bullet-points and make them pictorial to illustrate it a little bit more and a little bit more concisely. In that case, it ended up being more bullet-point, is what the person and I went through.

Joe: It is the year of visual learning. I think we're all trying to do that somewhat -- improve our sketching skills and drawing happy faces more because I think people relate, and they remember that so much easier.

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Matt: I would agree. The pictures are amazing at what sticks with people just trying to relate something that creates the conversation, so people can ask. I think that drawing pictures, it seems to stick. It just is something that can give a person an idea of what is wanted but isn't all the detail.

Trying to work with people in an A3 that aren't used to it, that's the first thing that I try to talk with them is in order to tell a good, concise story, you have to get a lot of stuff out of it that traditionally we put into reports and everything.

So the 30 pages of support, I'm not saying don't have it, but it's in the background. It's something that is supplemental to the A3. If people ask the question of how do you get to this number, or how do you determine this, then you can pull out the supplemental materials and show them. I'll have to say, in 10 years of using A3 for different things, I've had that maybe happen less than five times, where they've wanted to see all the detail behind it.

I think it becomes more appreciated when it can become graphs, pictures, flow charts with a quick explanation of what it is to tell that story.

Joe: You outlined it very well on this, and one of the things I wanted to compliment you on that was the fact that you're walking the walk. Many of us sit there and say, oh, you needed an A3 over here, you needed to do this, and you needed to do that. But when you look at your own way that you do things, you're not necessarily practicing what you're preaching. You are, so that's a great compliment here.

Matt: I appreciate it. I'll tell you what it's not easy at times. I mean, even the group I'm working with and I'm part of, we had to sit down a year ago and looked at each other and said, "How are we asking people to do this when we're not even doing it?"

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That started to change our minds on how we had to approach our work. Whether we're still good at it or not, I won't say.

We are making more of that effort to say, hey, we're asking you to use the A3; we're using them, but here is how you can use them and use them well. Because the first question we get from an internal client, is, "Well, do you have any examples?" Or, "How are you using it?"

Now, because we've gone through the pain of trying to use it and the learning from it, we can give them hard copy examples, as well as tell them, we went through the same thing that you're going through, trying to understand what this is and this is and how to put in on here, here's some pointers. It seems to help and relate with our clients a lot better.

Joe: What have you found is the difficulty in using A3s?

Matt: Well, honestly, the first part is getting kick-started, and just saying let's sit down and do it. A lot of people, me included, with A3s years ago, said, really, do I need an A3 for this? That's just going to be extra work. What I've found is, I quit trying to make them pretty on the computer and just did them in pencil by hand. That's where I took the meeting. For many companies and people, especially if you work with upper management, that can be a shock to them. I've even had to fight the stereotype of "you're not prepared" because it's not all prettied in a PowerPoint presentation and all that stuff.

So you kind of fight that sometimes. Sometimes you have to know your audience. You go through the effort to do it, and then you get looked at in that way, and you're going, wait a minute, no, I am prepared. That's the problem. I put a lot of thought into this. It's just not as pretty.

I've also found that if I've spent more than 15 minutes on it at a time, then I'm probably spending too long. It's better to come

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back in small chunks and keep updating and making the changes and it's breaking that mindset. It's OK to come back and erase and start over and create the new A3 or the new information that gets added on to the A3. It doesn't have to be perfect the first time - it won't be perfect the first time. That seems to be the hardest part. Once you can try and get over that hurdle, it seems to be easier.

Joe: I think it's interesting that we're seeing more and more of this iterative thought put into things. You go to the Lean Startup™, you go to the business model canvas, where they're talking about relativity, integrative business models, even, and changing them and updating them all the time. Really, it's very similar to taking a look at an A3. Is an A3 ever final?

Matt: I will say problem-solving A3's are. I would say there is an end to them. Now, the end isn't usually until -- if you're solving a problem -- you have put the countermeasure in place, and you have measured it, and you have done the checks for, however, long you decide to use to make sure that the improvement has held, that you're getting the results that you were hoping for and that they've held and stabilized.

Then at that point is when I close up those types from a learning A3 standpoint. Using some of my first ones this year -- mine are built for a yearlong -- I can't tell you there's an end. I could see it end in one of two ways.

At the end of the year, you say, this is where you are at, we're closed out on that A3, and we start a new one for the next year of learning. I could easily see carrying on that A3 and adding to and building onto the next year for it. How that plays out at this point, I don't know.

Joe: I did not mean that the A3 wouldn't be final, but you would iterate and create a new A3 and continue on as newer problems

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develop, as newer thought entered into it on a particular subject. I think that the iterative thinking is embedded in an A3, is it not?

Matt: Yes, I would say you're absolutely right, I would agree with that. It's just more thinking and coming back and looking at it over and over again. If you're going about the problem, you're talking to new people, you're going to see new facts, and you're going to see things happen. As you do that, you're learning more. As you learn more, you should be able to update your current state more, have a better understanding of what you might want the future state to be like, make the improvement, all that stuff. I would definitely say yes.

Joe: I always think the one great thing about developing any type of planning is the consistency in the plan or the consistency in the way you do it, such as in A3, makes people stop looking at the plan and they start looking at what's in the plan better.

Matt: Not only do the people around that you're working with, or the clients start to do that. There's also a very large confidence boost from the person using the A3 and using the process. As they do more and more of them, in the beginning, it's easier to take it and do it and learn in an environment in something that you're very comfortable with.

But as you get better and better at it, you can take it to areas you're not comfortable with or something you know very little about. If you can just follow the process, you have the confidence that you're going to get to the end with a good resolution and a good thought process that gives you the confidence to know you're going to have a good solution or a good idea at the end that will make sense that people will buy into.

It even helps the person using it as they get through and be put into situations where they might not normally feel as confident. Because they don't know the process, they don't know the area,

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they don't know the people, and they don't know the environment, that type of thing.

Joe: Have you seen A3s starting to happen outside of the Lean champions of the organizations? Have you seen it being developed where it's becoming a standard way that people put proposals together or solve problems?

Matt: Yes, which is great, because it's taken us a year, a year-and-a-half, to get there within our organization? We're talking a company that's close to 4,000 people. We're nowhere near there, but we have some pockets where it's nice. In fact, I was working with one director on how to use the A3, how to use the A3 for strategy, and how you can use the A3 for the tactics and initiatives that they have to go after for that year.

That director pulled out a piece of paper and goes, "Oh, like this area. They're using one." She handed it to me, and I said, "Yes, exactly." Maybe laid out a little differently, but all the thought process was there. They're trying to communicate what they're going to do and how they're going to do it, what the plan is, and everything. So, it was great to see. Some areas are starting to use it as more of a communication tool now.

Joe: Where would you warn people not to jump in and use an A3?

Matt: Well, I don't know if there's a place or a type of situation where I would warn them not to use an A3. But what I would warn them on is formatting or the A3 itself. In our example, or in our case, we have multiple A3 formats depending on what type of work we're trying to do. So if we're trying to solve a problem, we have one format. If we're trying to develop a strategy, we have another format. If we are trying to work with a client in scope work, we have a different format.

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We've used the A3 format in concepts to lay out the work that we need to do but have set it up and put templates in place to meet that need. It's not a one-size-fits-all. You know, we're even having a discussion now to say, "Is that's working for us or not?" and having a reflection piece on it now. I don't know, because, honestly, from my standpoint, I could see A3's being used anywhere because it's a great tool to help foster discussion and bring items to the table. A side benefit of using it and putting it on paper is it actually will focus -- it's a small psychology thing -- the discussion on the issues on the paper and not the person whom you're talking to.

I've even used an A3 one time for no other reason than that I've framed up the current state and what I believed the future state needed to be, to go have a discussion with a person where it was believed their area was causing problems in another area. Just by using that and focusing on the piece of paper, we were able to have a discussion and a better understanding where both areas wanted to be, and not the areas pointing fingers at each, saying, "No this is your fault, no this is your fault," type of thing.

Joe: I think that's very intriguing that you say that because it is a great way when you're looking at that piece of paper. It's not like you're looking at the person. It's kind of symbolic in itself, isn't it?

Matt: Yes, it is. It's kind of crazy, because the first time I heard somebody say that, I kind of gave them a little look out the side of my eye like, yes, you seem a little crazy about that. But as I tried it, it worked. So the conversation didn't get adversarial. They were truly about the problem and what was going on.

Joe: Is there anything about an A3 that maybe I didn't ask that you would like to comment on or add?

Matt: Use the A3 to create the discussion, to have the discussion. You've got to remember, it's not a reporting tool:

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finish your work and put it in this format. If you've already finished it, there's no need to put in in an A3, because the A3 is to help that discussion across areas and borders and functions so that everybody gets on the same page. It gets the agreement of what they want to do and how they want to do it. That would be the biggest thing to remember when using it.

And it doesn't have to be a one-size-fits-all format. In my eyes, there are a few main components that an A3 carries, and that would be the background of the problem, what is the current state, what is the future state that we want. What is the gap or the implementation plan to get to that future state and what are the results. If it contains that in any kind of format, then you're telling a pretty good story.

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

Matt: There is contact information through my blog, beyondlean.WordPress.com, and there's a contact page. There's also my email, which is mwrye75@Gmail.com.

Joe: You're also on LinkedIn, I believe, correct?

Matt: Yes, I am on LinkedIn.

Joe: All right, well, I'd like to thank you very much, Matt. I think it was a good conversation about A3s, very practical information for all of us to be able to take ours to the next level. I'd like to thank you very much.

Matt: Thanks, Joe, it's a pleasure.

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

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

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