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Podcast Transcription

Implementing Lean Marketing Systems

Individual Lean, Root Cause of Success?

Guest was Dan Markovitz

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BIO

Dan Markovitz is the founder and president of [TimeBack Management](#). He focuses on improving individual and team productivity through the adaptation of lean concepts. He's a faculty member of the Lean Enterprise Institute and teaches classes at the Ohio State University's Fisher School of Business. Dan's book on improving personal performance by utilizing lean manufacturing techniques – [A Factory of One: Applying Lean Principles to Banish Waste and Improve Your Personal Performance](#) – was published by Productivity Press in December.

The book demonstrates how to apply lean principles to the individual. It delivers key concepts such as visual management, flow, pull, and 5S. Dan provides these concepts to the individual results in the same kind of benefits: greater efficiency, less waste, and improved focus on customer value.

Transcription of the Podcast

Dan Markovitz: I have been trying to get visibility for the book and for my writing, and I have to say I have been really pleased. For a long time, it seemed as though people were not terribly receptive to the notion of bringing Lean to an individual level. They said, "Yes, that's kind of nice." But they were thinking more about Lean in terms of large services, or processes and systems, I should say. What I am finding now that it is out in print is that more and more people seem to be getting it.

They begin to understand, "Hey, wait a minute! Lean doesn't just apply to systems and processes; it applies to the individual. We can use the same tools at an individual level, and realize the same benefits." That is really rewarding emotionally.

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Joe Dager: That's great, and let me introduce you. Welcome everyone! This is Joe Dager, the host of the Business901 podcast. With me, today is Dan Markovitz. He is the Founder and President of TimeBack Management. As you just heard, he focuses on improving individual and team productivity through the adaptation of Lean concepts.

Dan's latest book is "A Factory of One" was published in December. His latest articles are on the Harvard Business Review blog, and Dan is also a regular contributor to the AmEx Open Forum.

Dan, I would like to welcome you, and at the beginning you gave a great introduction. People are using Lean for their personal use now, and that has to please you.

Dan: It sure does. I have been preaching this message for a long time, and it is good to see people finally picking it up. It is important because I see so much wasted individual performance and potential squandered in inefficient systems and work habits. So it is nice to see people picking this up and improving.

Joe: Well, what does "Factory of One" mean?

Dan: Coming up with this title was actually a real dilemma. My publisher wanted something clever like "Individual Lean" or "Personal Lean," and that pretty much put me to sleep, and I am the author of the book. What I wanted to do was come up with something that was a little more resonant. It occurred to me one day when I was actually working with a company, and a client of mine, that people are factories, too. We are really small factories, but we are factories.

We think of factories generally something like Toyota, where you are making cars, or you are making jet engines, or you are making Pop Tarts or toasters. But the truth is, a factory is a place

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where raw materials are transformed by some magic into a product or a service that people want.

Whether it is a car or it is a marketing plan, or it is an advertising campaign, or whether it is a piece of music, we are factories. We take inputs of all sorts - customer desires, ideas that we have, requests from friends whatever it happens to be, and we work our particular magic, and out comes something really great, something we can be proud of.

And that makes us factories. Because we are factories, we can take advantage of the same Lean ideas that Toyota developed over the years.

Joe: Is it like the GTD, Getting Things Done or a Franklin Covey approach? What is the "Factory of One"?

Dan: You know Joe, that's a really good question. The truth is there is overlap between something like GTD or Stephen Covey's "7 Habits" kind of thing, or really any other kind of personal productivity. There are definitely areas of overlap. But there also are some real differences. For one thing, I believe that those approaches don't encourage you to look for root causes. A perfect example is this. Stephen Covey or Julie Morgenstern or any of these other time management people will say, "OK, don't check email in the morning, but when you do check email, this is how you should do it."

OK, that makes sense right? What I would say is, those ideas are good, but why are you getting so much email in the first place? I can make you really, really fast with handling email, but making you fast at dealing with something that's garbage is still a total waste of time.

It seems to me that it is better to figure out why you've got these problems in the first case, looking at the root causes to root them out, try to eliminate them, and make things more effective.

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I think that to me is one of the major differences. The other differences I think are that, what I am trying to do is take advantage of a common understanding and a common vocabulary of Lean ideas and concepts and tools, and saying, "Hey, you know all those things you have been using before? We can use them at an individual level."

There is nothing wrong with picking up GTD lingo. That's great. But if you have spent the last three years, say, on a Lean journey in your company, learning about flow and learning about 5S, and learning about standardized work, why should you now have to learn something like a GTD context, 30,000-foot levels, next actions and all that stuff?

Why not just keep using the same language and tools and ideas that you've been using in the production process? It seems to me that's easier.

Joe: Well, we've seen a transformation of Lean into service work and into knowledge work with Agile and Scrum and into hospitals. Now you're leading the cause to take it to the individual level, I believe. What have you found out? What are some of the common things that have worked well? Then maybe throw a few negatives in there.

Dan: In terms of what's worked - let me actually start with the negatives for a minute. I think it's sometimes easier to start that way. What I think is really dangerous is to transfer and not translate the concept. A real simple example of this is 5S. A lot of people in a manufacturing environment will start with 5S. They'll say, "This is the foundation." We can have a good discussion and argument about whether 5S really should be the foundation and the first step for Lean. But that's another story.

But what people will do is say, "OK. 5S, that means we've got to put tape outlines on your desk and show you where your stapler goes and show you where your computer goes." Or, "It means..."

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Kyocera, actually, in the United States there's a big article on them in The Wall Street Journal. They have basically a 5S desk cop who walks around to people's offices and says, "You can't have more than one photo on your desk, and it can only be 5"x7" and you can't hang your sweater on your chair." That is a transfer of 5S principles from the factory to the office. It's not a translation; it's a transfer. But it's insane.

Joe: Yes, I get that all the time about my dresser and my bedroom from my wife.

Dan: Now, your wife - if you're in a relationship, your spouse has the final say on what value is and what waste is. I'm not going anywhere near there. I don't even do that at home with my own wife because I want to stay happily married. But it's interesting, this is a lot of what Mark Graban - who, of course, you know - of Lean Blog calls LAME when Lean is misguidedly executed. "I'm going to walk in with my little tape outlines to ensure that it looks like a factory." But that's crazy because that's a transfer, not a translation.

To me a translation means saying, "OK. How do we take the fundamental principle and the goal and make it meaningful in an office setting?"

Let's come back to our 5S example. What a knowledge worker's dealing with really and working with is information. The goal here is not worrying about where the stapler sits. The goal is understanding where the information is so that we can make it easy for people to access the information and to spot abnormalities.

They're not working with wrenches and screwdrivers and hammers, we don't need a shadow board or the equivalent of a shadow board. What we need is a place for them to be able to put the information so they could get it more quickly. And they can see if there's something wrong.

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The nurses at the Covenant Healthcare System in Texas did something that was just a fantastic example of this. They found that they were spending - they did a survey - 51 percent, about 6.1, 6.2 hours per 12 hour shift working on paperwork, pure documentation.

No one goes into nursing saying, "You know, I want to become a nurse so that I can fill out forms." They go into nursing because they want to take care of patients. They were spending 50 percent of their time filling out paperwork. They were generating 2.2 million pieces of paper a year. God only knows what they were doing electronically, but 2.2 million pieces of paper a year.

So they said, "This is crazy. Why don't we take this principle of 5S down to a level of our work, down to our knowledge work." They simplified and standardized and set in order all the forms that they worked with.

They cut both the number of pages and the amount of time pretty much in half, down to about three hours, which is still staggering, but OK, three hours of paperwork. They cut it down to about a million pages a year.

What they're dealing with is not where their stapler is. They're dealing with where their signature goes, and where the doctor's orders go, and where the patient follow-on care goes, on the piece of paper so that they can find the information quickly. That's translating 5S to the knowledge environment. That's the kind of thing that, to me, is really, really exciting, because that's the kind of stuff that hasn't been looked at.

Joe: Think of applying Lean to sales and marketing and the first thing they want the salesman to do is be data collection points for how they're going to improve efficiency and effectiveness. I see sales guys spending a lot of time filling out their contact updates. Anymore a sales guy's job seems to be 50 percent of the time

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filling out paperwork. I struggle with that because to me that is not Lean.

Dan: This is an interesting dilemma I think we run into. Because we now have the computing power, the processing power to do more work, to get more information out of data we collect, we're now encouraged to collect more data, whether or not it's really necessary. I think you can make a pretty good argument saying, "Gosh, we've got these wonderful tools, and it makes sense for our sales and marketing guys to be collecting some of this information." I think you could have a good discussion. But then it requires us, I think, to say let's use the Pareto principle and figure out what...

I'm sure only of the data they're collecting, 80 percent of the value comes from 20 percent of the data. I would guess that you could get rid of a huge chunk of the work.

At one company I worked in, in one of my previous careers, we had our IT department. We're going back now to the days of AS400 computers and everything was all central processing. So if you ever wanted a report run, you'd fill out a form and give it to the IT guys, and they'd write a program. And they'd spit out a report on the big guy, the dot matrix screen bar paper.

Joe: How old are you, Dan?

Dan: Listen, we weren't using punch cards. I'm not that old. This is great because people would say we're going to a sales meeting, for example. I really need to know what our inventory is and what the standard costing is, what the inventory's been written down to, so we know how to close it out and so on and so forth. They'd ask information about the effectiveness of certain sales programs, or whatever. They'd write the request, and the IT department would dutifully do their job. They'd write the program, they'd run the report, and they'd start generating the reports on a daily or weekly basis, whatever the request was.

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Of course, no one told them to stop. You would see these reports. They would generate this every single week, hundreds of reports. Of course, the reports all had really clever names like PR13679A. You didn't really know what was going on. You'd have to work your way through all the column headings to understand what you were looking at.

They would just keep coming out and coming out, and no one was looking at them. Of course, the IT department, their job was to provide a service, and they did, and they provided it very well. The problem is that after a while, the data, the signal to noise ratio started going down because there was so much crap being generated that no one ever needed.

When I was with the company, we said all right, let's collect every single report we look at. It was hundreds. Literally, they were generating hundreds of reports each week. We said OK, which ones do we really need? We don't need this, don't need this, don't need this, and don't need this.

Anyway, we ended up cutting out about 80 percent of the reports. We're down to 35 or 37 reports a week that people identified what they wanted, out of the hundreds that we started with. That, to me, is another example of 5S.

Joe: You mentioned at the beginning that you use the typical Lean principles in doing that, and the Pareto you mentioned. Do you find people are more familiar with that now than what they used to be?

Dan: I think so. If they're not more familiar with it, I think they're more ready to hear the message. Again, with the data explosion that we've seen over the last 10, 15, 20 years, I think people are increasingly feeling, everyone I know is feeling overwhelmed by the amount of information that comes at them, by the amount of work they're expected to do to process that information or to provide the inputs for that information. I think

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people are willing to say wait a minute, maybe there's a different way or a better way. I think there may be either a greater knowledge of these ideas or just a greater willingness to look for help and say we've got to do something different.

It occurs to me, as you asked that question, Joe, if you think about Toyota, all the way back in the day when they were starting, they didn't go around saying, "Let's invent something called Lean." They had a problem. They had no money, and they couldn't buy raw materials and they couldn't store inventory. They had to do something to reduce the cash burden. They started developing the whole Lean production system.

It occurs to me that perhaps on an individual level, we're seeing the same thing. We're running into a constraint of peoples' time and attention and ability to process information. We're going to have to come up with different ways of managing that information so that we can still do our jobs.

Joe: When I picked up your book, and I kind of looked at it as a personal Kaizen or PDCA type thing. It's going to be continuous improvement on how I do things, let's say. One of the things that I always think about in PDCA is that they always say that 50 percent of your time should be spent on planning. We can't do that as people. Can we?

Dan: That's a good question. I'm not sure. I guess I don't know. I guess the easy answer would be what's the cost of not doing it? Your questions are really thought provoking for me, Joe. I haven't thought through all of these ideas. But it occurs to me that we often don't value, or we don't recognize the cost of not planning. In the knowledge working world, it's hard to quantify waste. It's hard to quantify inefficiency. I think we have a tendency to just look at this stuff as that's the cost of doing business. That's just the way things are. It's not ever going to change.

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If you worked in a manufacturing plant, and you saw five percent or 10 percent scrap rate coming off of the production line, you'd say there's a real problem. Our car doors, 10 percent of them are crap. The glass that we're manufacturing, 10 percent of it, we have to throw out. That'd be totally unacceptable.

We have no problem at all in accepting the idea that 10 percent of your day is total waste. I could go into chapter and verse about this, but let's just think really simply. How many times have you been in a meeting that started 10 minutes late, which had 15 minutes or 10 minutes of nonsense in it, and ran 20 minutes long? Of course, when you're running late to the next meeting, the people in the next meeting are waiting 10 minutes, 15 minutes until the meeting actually starts.

This is a colossal amount of waste, but we never actually quantify it, and we never value it. We never say gosh, this should be or could be fixed or addressed.

Joe: I go back to Kanban; one of the Personal Kanban things is to build slack time, which is seldom done. There's an expectation that we're going to get X amount done, but there's really not actual slack time built into peoples' schedules, is there?

Dan: No, there's almost never. I think actually Jim Benson, of Personal Kanban who really was very, very influential in helping me craft some of the thoughts in some of the chapters in my book, I think he really did a great service by drawing the analogy to a freeway in operations research. It says that any system that's operating at more than 80 percent to capacity or so is going to break, whether it's a production line or whether it's a freeway. You're going to overload it, and it's going to break. I think Jim's absolutely right when he says we have to look at humans the same way.

If you fill your life over 80 percent capacities, you're going to fail. You're setting yourself up for failure, and because you work in an

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organization in which everyone...it's a system, you're going to be setting them up for failure as well, because you're not going to be able to meet your commitments.

There's going to be a problem with the computers one day. There's going to be a problem where a client or a customer calls you up, and now you have to spend an hour talking him or her down off a ledge. Or you're not going to be able to come to work because your husband or your wife or your kid is sick, and you have to go to the hospital, and then everything breaks.

I think you're absolutely right. The notion of building in slack, we have to build in slack because we just can't operate at perfect efficiency all the time. It doesn't happen. The world is too chaotic for that.

Joe: Let me take that negative approach then, and throw something back at you. How much slack is enough, and where does that start becoming wasteful? All this stuff, it's hard to get your arms around it. I'm trying to say I can Lean it; I can do this, but how do I really grasp it and understand it and get it? Understand how to do it?

Dan: If you think about Taiichi Ohno, the first thing he had anyone do was stand in a circle, right, and just watch. Don't do anything. Just watch, watch what's happening and watch what people are doing. I think to a certain extent, we have to stand in a circle and watch ourselves. It's probably unrealistic to ask a colleague, "Could you watch me for the next three hours?" That would be an interesting exercise as well.

I think the first step is to watch what we're doing and figure out how we're spending time, what we're doing. How much of our activities are actually value-creating and how much of it is just busy work? How much is form and how much is content? How much is waste and how much is value? I think that's the first step.

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I think that ties into the next idea, which you had talked about earlier, this notion of PDCA. What if we try an experiment? The hypothesis is that if we leave a certain amount of slack in our schedule, or if we work in a certain way, things will go more smoothly. Then continue the circle to PDCA, I think that might lead to more effective work.

The other thing that occurs to me, I'm on a roll here. One last thing is that what we're talking about on an individual level, of course, cascades eventually to an organizational level. You've probably been in an organization that said, "Yeah, we've got 37 strategic priorities this year."

You can't have 37 strategic priorities in a year any more than you can have 37 strategic priorities for the day. I think the companies that really excel are the ones that don't try to do 37 things, they try to do three things.

I think it was John Toussaint at ThedaCare, tells the story about how they had, when they were doing their Hoshin Planning, they first started with, I don't know, six things or seven things. Then they went down to five things for the year. Then they went down to three, and now I think John Toussaint says, "If we can do two things great each year, that would be enough because it's just so hard to do."

Joe: I think that it is. To jump back a little bit, when you were talking about the reflection upon yourself, have you ever heard of anyone just videotaping themselves and going back and looking at themselves for an hour?

Dan: That would be creepy, wouldn't it? It's hard enough listening to myself on a podcast. I don't like hearing my own voice. I don't know if I could watch myself.

Joe: I just wondered. Because it's amazing what you see when you're looking from, let's say, the outside in.

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Dan: You know, I am working with the Lean Enterprise Institute right now to develop a workshop, a half-day workshop based on the principles in my book. One of the ideas we've been tossing around is, if we did something onsite, meaning not an open workshop, but we did it at a company, could we video one or two people for, let's say, I don't know, three hours or something, and then compress it by time. You'd go super-fast or something, so you can see it in three minutes or five minutes. What would we see? Because we couldn't, of course, have people watch it in real time. No one wants to sit for an hour in a workshop watching someone. But I bet that you would see that a lot of the waste, a lot of the ineffective work modes that we have would really come to the fore and be visible. I think we'd really notice something. Boy, that would be...here, Joe, don't mind me. I'm just going to set up a camera in your office. You don't mind that, do you?

Joe: On the other hand, what would be the difference between watching a golf swing or watching a worker at work? We do Time and Motion studies.

Dan: When you talk about that, I wonder what would happen if you made people sit through if you videoed people in meetings. This is another area, people involved in processes they don't necessarily recognize as a process. I worked with one company where they were very consensus-driven. They still had the DNA of a small startup company where everyone can sit around one conference table and make a decision, except now there are several thousand people. So everything has to be made in a group decision, but they don't actually have a process for reaching consensus.

So you see them go into a meeting and talk about a whole bunch of ideas. This is a meeting in which they're supposed to come up with an idea. Then they come up with what they think is a consensus, but then they didn't agree afterward.

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They'd meet the next week, and they'd say, "OK, so we all decided to do X." Someone would say, "I didn't hear that." Someone would say, "I thought we decided to do Y." And someone says, "I thought I heard Z."

I wonder what would happen if you had people watch those meetings, watch themselves, and watch the way they interact, and watch the way they don't focus on their goal, and watch all the digressions and the inefficiencies. I wonder if that would create a change in...

Joe: Behavior.

Dan: The way they...yeah, behavior. Because as you say, it's all about grasping the situation, and sometimes you can't grasp it unless it's objectively in front of you. Like you say, an athlete videotaping a golf swing or a baseball swing or whatever it is.

Joe: Everybody's common thing about productivity, especially from a knowledge work standpoint, is that here you are doing it, you have your task, you have your schedule at hand, and either your boss comes in or you'd pick up the phone and the whole world changes.

How does Lean apply to something like that?

Dan: I think that one thing people have to do is, again, if we start looking for root causes and we start looking for patterns, I think Lean is important for that. It's grasping the situation. How often do we get these interruptions? Why are we getting these interruptions? How might we be able to handle these interruptions better? That can change. That can either reduce or eliminate a lot of the interruptions. A perfect example of this was a pathologist I worked with at a hospital. Her lead times in processing cases and reading slides was going up and up. Her boss was displeased with that. She was getting more

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experienced. You would think that it would take her less time to read cases.

I sat in her office with her, and I just watched kind of the Ohno circle approach. I watched, and it turns out that every little while someone would come in to say hello. Then sometimes, several times during an hour, a technician would come by with a pile of slides, new cases for her to read. He'd say, "Hey, Marsha, I've got some new slides for you." And she'd say, "Oh, great, thanks. Just put them over there, and she'd gesture over to the cadenza or a table or whatever, and then he'd drop them off.

There was interruption after interruption. She was involved in a committee, and sometimes her co-committee chair would ask her about the next meeting and whatnot. Every time she was interrupted, she would pick her head out of the microscope and she'd talk to the person. Even if it was just for five or 10 seconds, she'd put her head back in the viewfinder, and she'd start reading the case from the beginning. She worked in a cancer center, and you don't want to make a mistake.

She never got to work uninterrupted. We looked at that. I said, "Hey, gosh, how could we get rid of these interruptions?" And she said, "Well, you can't."

I said, "Well, what about, for example, taking these slides, and let's use something really fancy, like a cardboard box outside your door with a little paper sign that says "Leave cases here"? Then you can create, as part of your standard work a cadence, that every hour, say, or whatever's the right time, every 90 minutes you open your door and you pick up the new cases that came in, and log them and do what you need to do. We did that, and she was able to reduce her interruptions dramatically.

Some of the interruptions that we get, I think, are totally avoidable or removable. For sure you're going to have interruptions. You're going to have things that mess up your

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schedule because there really was a problem with the product. There really was an upset customer whom you've got to deal with - the invoicing was screwed up and now your customer's irate and ready to fire you.

There are these exceptional cases. But I think that there're an awful lot of deviation or interruptions that we can avoid just by looking at the system and understanding what the causes are.

Joe: So you're saying if you really sit back and take a look at them, that you have much more control over the situation than, typically, applying that Pareto principle? You have a lot of control.

Dan: Yeah, I think often we do. I think oftentimes there is a lot more room for improvement than we realize. We just haven't bothered looking. We just say, "Oh yeah, I get interrupted all the time." "Oh yeah, I get these problems." But we don't really understand why because we've never stopped to really grasp the situation. The other thing, where I think Lean is really important, comes in the notion of visual management. I hear people saying all the time, "You know, I feel like I'm always reactive. I'm not proactive. I'm always being tactical. I can never be strategic."

They cite the same thing that you talked about - an email comes in that's kind of important or my boss comes in and says, "We have to do X, Y, and Z." I think what I see is that because we are knowledge workers our work tends to be invisible. It tends to reside in bits and bytes of electrons of data sitting in our email inbox, sitting in a document somewhere on our computer desktop, whatever.

But it's not real visible. It's not like an engine assembly in front of you. It's not like a fan blade that you're working on in front of you. As a consequence what happens is that it's very easy to pull my attention away from what I'm working on.

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I think visual management, the notion of taking the work that you're doing and somehow making it more visible, making it more visual, enables us to better judge whether we should be responding to this new problem rather than the thing that we were working on.

Again, the simple example, Joe, would be, I am working on something and then an email comes in, and I look at it, and I say, "Oh, boy. I'm going to handle this," and I get distracted by that.

The problem is I don't know what I'm supposed to be working on. Because my work is relatively invisible, I don't really have the ability to say which is truly more important, this new thing that came in or this old thing that I was supposed to be working on.

What happens is we're always distracted by the squeaky wheel and we start giving it the oil or the grease, instead of saying, "Gosh, this wheel maybe squeaking, but I've got much bigger issues to take care of."

I think ideas that you see in something like Jim Benson's Personal Kanban, that's one way of making the work visible. You've got the physical representation of it on a white board, and now you can say, "These are the three things that I am working on now. This is my work in progress. Oops. Here comes something new. Well, is it more important than these three things? Yes or no?" If the answer is yes, well then, great, change. If the answer is no, well then, figure out how you are going to handle it.

Stick with what you are doing and then figure out how you are going to cue up that new thing, or hand it off to someone else or ignore it or whatever.

Joe: I always heard more important than a pencil, an author's best tool is the door. I always thought that made a lot of sense, OK?

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Dan: It's a remarkable piece of technology that we are still unwilling to use, the door. If you close it, it's a remarkable signaling device.

Joe: You always hear these open door policies, but that doesn't necessarily mean that you can never close your door, right?

Dan: Yeah, you know, the open door policy is obviously true. You don't set up a moat, and a barbed wire fence, and crenulated walls with turrets protecting your office. But at the same time, that doesn't mean that you have to be available all the time and every minute. The truth is, your customers aren't. The truth is your boss isn't. The truth is no one is, and I think set expectations about what a reasonable response rate is or turnaround time is. I think that's really important. Oftentimes companies don't do that.

They just say, "Oh, you have to be responsible to everything all the time." But you can't do that. I mean, if your job is a receptionist, then sure, that makes a lot of sense. You have to be available anytime someone walks through the door, great.

But most of us are not working in jobs like receptionists, and so we need time to actually wall ourselves off and focus and solve the bigger problems. If the job is designed for you to both solve big problems, and people expect you to be available for instant response, I would say that job is poorly designed and is setting the person up for failure.

Joe: Does Leader Standard Work coincide with the "Factory of One"?

Dan: I think so. I think that's an element of it. If you think about a leader as producing, let's just say the person is not a front line employee, right? It's a VP, senior executive, whatever. He or she is producing an environment and an organization that can deliver the product or service, the results that the company or the

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customer needs. What tools can we put into effect to enable a leader to do that? How does 5S apply to his or her world? How would Standard Work apply to his or her world? I think it absolutely fits in. It's just these things take a slightly different shape. The principles are the same, but it takes a slightly different shape when you're dealing with what a leader would be doing on a daily basis rather than the head of the accounts payable department.

Joe: If someone could only take one or two things from your book what would you want them to take from it?

Dan: I would want them to take away the idea that their own work style can be improved. That's really important. I think people tend to think of the way they work as something immutable and unchangeable. Understanding that the way they work can be improved is really important. Second thing I'd like them to take away is the notion of experimenting. People are loathed to make any changes, and they're afraid to suggest changes to the company, because they say, "I can't do that, we don't work that way."

To have the mindset of, I want to try and experiment. I have a hypothesis that if we did X, Y, and Z, things would be a lot better. Let's try it for two weeks and see what happens.

If people took that away, I think what we'd see is a great deal more creativity in the way we work. We'd see enormous improvements across all kinds of job functions, across all kinds of companies, and all kinds of industries, because people wouldn't be shackled by tradition.

I guess the last thing that I would like people to take away, and this is a real global kind of thinking, is the difference between value and deliverables. I'm actually working on an article about this. The form in which we deliver things is not necessarily the most effective way to do it, and the form is not the value.

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I always talk about performance evaluations in this sense, and Joe, I don't know enough about your background, but everyone I know who's ever done performance evaluations hates them, just despises them. They're enormous time-sucks. They're not terribly helpful for the person doing it or the person receiving it.

We think that, well, here's the performance evaluation. I have to fill out this form and have this kind of conversation and talk about these six things. That's not what your customer, in this case, your direct report, wants. The direct reports wants, in terms of value, help in figuring out how to improve and how to advance within the company. He or she wants help in solving problems.

Performance evaluations are just one form, and a terrible form at that, for delivering that value. What we could do is create something so much more valuable that really is less onerous and less hurtful than a performance evaluation.

I know John Shook over at LEI has talked often about how you can use A3s as a performance evaluation. You define what the target condition is and countermeasures to approach that, and you go on.

Joe: And you work on the process versus the person.

Dan: Exactly, exactly. To me, understanding what the value is and distinguishing between the value and the deliverable, I think is incredibly important. I think people would find that if they focused on that more, they'd actually have more time to create value, to do stuff that's really important to them individually, to their boss, and to the company.

Joe: How does Lean fit in to, let's say, the appreciative inquiry approach? I've done a lot of research in that area in the last few months and quite a few podcasts. It seems that Lean is viewed from problem-solving and appreciative inquiry is a little more positive change orientated. How do they meld together?

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Dan: I'm not all that familiar with appreciative inquiry, Joe, so I would probably defer to you on how to blend them together. From what I understand of it, I think the notion of saying, taking a positive approach, where it's not a name, shame and blame kind of thing, but rather hey, there's a problem, what can we do to improve the current situation? What can we do to get to the target condition? Looking at this as a joint journey I think moves the discussion away from the assignation of blame and fault, and instead moves it towards a cooperative, problem-solving exercise.

Joe: I think that's one of the issues of Lean, and when we apply it to, let's say to a person, is that we really have to distinguish and sell the person on the fact that it's about the process, it's not about you. It's about the role and how to improve the role. It's not about John, Dick, Suzie or something. It's about the process of it and how to improve the process. That seems to me a big hurdle of applying Lean to your personal life.

Dan: Yeah, that makes a lot of sense. As humans, we all fall prey to the fundamental attribution error, in which we assign blame to individuals rather than to a process or to the environment or to the system. We tend to do that, I think, on an individual level. We say there's a problem with me, there's a problem with her. I think you're absolutely right. How to overcome that and get people to think about it as a process, I think that if we start applying Lean individually, by ourselves, it makes us more sensitive to that.

If I'm looking at the way that I work, instead of saying, "Boy, I really stink at this, or this is really hard for me to do," we can try to say, "What is it about the system that makes it difficult for me to accomplish this?" It starts to move our focus from ourselves to a process, to a system, to an environment.

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Then I think that translates well when we start looking outside of our own four cubicle walls or four office walls. I guess it's three cubicle walls. We become trained now, or we become accustomed to the notion of looking at a system, rather than looking at an individual. When we're looking at ourselves, we're looking at the systems that we have and the systems in which we work and trying to identify ways in which to improve those.

Joe: I think you explained that well. I look at the fact that from the times that I've talked to Michael Bally, he always said that Kaizen is an individual thing because you've got to be able to take care of yourself before you can help others.

Dan: I think he's absolutely right, absolutely right. I always say in order to lead it; you've got to live it. In order to lead Lean, you've got to live Lean. And that means not just using tools but really having the mindset of let's look at systems and let's look at processes, and let's try to continuously improve all that stuff. I think it's required for us to be able to be effective leaders.

Joe: What's coming up in the future for you?

Dan: As I mentioned, I'm working with LEI. I'm developing a program, both that will be open, just as they do with all their other training - all their other workshops are open in various cities - and hopefully will be able to deliver as well to companies. I'm developing a workshop for the upcoming AME conference in - is it October or November, in Chicago, where I'll be leading a half-day workshop on this topic as well. These are two areas that I'm very, very excited about.

The other thing that I'd like to do that I'm working on is trying to expand some of these ideas that you and I have discussed, to as I mentioned earlier, some of these processes that exist that we're not really even conscious of. The process of coming to decisions, that to me is a really...or consensus, for example.

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That, to me, is a process, and it can be improved. We just don't often look at it as a process. We just think OK, we've got to make a decision. Yes, but in order to make a decision, there's a process. Every company is a little bit different, but we don't look at that as a process.

I believe what happens often is companies take too long to do it, or they don't do it well. What I'd like to do is help people start to define some of those less obvious processes, and identify ways to improve them. Those are the three things that I'm working on right now.

Joe: How can someone get a hold of you?

Dan: You can go to my website, of course, timebackmanagement.com. You can follow me on Twitter, and I tweet under the handle @timeback. You can send me an email, dan@timebackmanagement.com. They can contact you, of course, and you can serve as my skill and forwarding arm. I also respond to smoke signals, Semaphore, and bright flashes of light in the night sky, sort of like Batman.

Joe: I want to thank you very much for your time. I appreciate it very much, Dan, and look forward to having more discussions about it.

Dan: Joe, it's been a pleasure. I do appreciate you giving me to the opportunity to speak with you on this podcast, and I look forward to working with you going forward as well.

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What others say: *In the past 20 years, Joe and I have collaborated on many difficult issues. Joe's ability to combine his expertise with "out of the box" thinking is unsurpassed. He has always delivered*

quickly, cost effectively and with ingenuity. A brilliant mind that is always a pleasure to work with." James R.

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

An example of how we may work: Business901 could start with a consulting style utilizing an individual from your organization or a virtual assistance that is well versed in our principles. We have **capabilities to plug virtually any marketing function** into your process immediately. As proficiencies develop, Business901 moves into a coach's role supporting the process as needed. The goal of implementing a system is that the processes will become a habit and not an event.

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