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Empowering Operations

Guest was Shawn Casemore

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Transcription of Interview

Joe: *Welcome everyone. This is Joe Dager, the host of the Business901 Podcast. With me today is Shawn Casemore. Shawn has spent much of his career leading a variety of teams across six different industries and across all roles within the organization. Shawn is also a graduate of the Alan Weiss Mentor Program, which I am extremely jealous of. Outside of that, we're here to talk about Shawn's new book that I believe was just released, 'Operational Empowerment,' Shawn, I'd like to welcome you and thanks for joining me.*

Shawn: *Thanks, Joe. It's great to be here. I appreciate it.*

Joe: *I enjoyed your book, but I have to say, it was not anything I really expected. I come from sort of the Lean slant and with the word 'operational', in the beginning, I was actually expecting operational type things, but I'll leave it to you to give the elevator speech about the book. What's inside?*

Shawn: *Sure. Well you raise a good point. The title is around operations. My bias is this,*

that after any company, whether you're in manufacturing or in a service-based industry, it doesn't matter; after you sell it, you have to deliver it, whatever it might be. How you deliver it, I consider that the operations.

The book itself is really written around the key topics of strategy, leadership, process or process I guess if I'm standing on the US, south of the border, and then how to build the continuous improvement and collaboration and innovation into an organization. That's kind of the overview, but I guess the one thing I'll mention is that to build on this, this comes from my experience in consulting with organizations across North America during the past – going on a decade, I guess, 7 to 8 years now that I've been out on my own.

The book is not just filled with theory and ideas, it's obviously based on research but it's also based on dozens of case studies and examples of my clients and how they've applied greater degrees of empowerment in the various areas of their businesses that I've mentioned and the results and the outcome that that's created for them which has been both profitable, but also helped improve their culture and their standing from a competition standpoint.

Joe: *Well could I turn that book in somewhat of a -- I don't want to say inside out, but you really do gather some interesting thoughts on the internal organization, but really making it transparent, I guess to suppliers and customers.*

Shawn: Yes, I was thinking a little bit about this but when I put this together, obviously the forefather of value, because I speak a lot about value in the book, is Porter and to me,

Empowering Operations

Guest was Shawn Casemore

when I think about an organization, there're really three components and I do a lot of speaking with Vistage and Intech and all sorts of different CEO groups and I break it into three distinct areas. One is employees, two is suppliers or your supply chain or the market if you will, and three is your customers. Because without any one of those specific groups, you don't have an organization, and you don't have value being exchanged. So the book specifically speaks to all three of those. It's heavily weighted around the organization, the operation, and the employee side but it speaks to all three groups because it's through all three of those groups that we can actually shift more autonomy, responsibility and create a higher level of engagement and collaboration between those parties to actually deliver more value which is what we need to do to sustain and survive in today's new marketplace.

Joe: *I want to touch upon a few areas that struck a chord with me in the book, and one of those is you challenge the traditional SWOT analysis. Tell me, what's wrong with a SWOT?*

Shawn: Well if you go into detail, I don't bash the SWOT too badly but here's my experience. We can use a SWOT for a variety of reasons. Historically I've used it as kind of a lead into strategy, but when you start to work through and identify strengths, weaknesses, opportunities and threats, invariably I find a couple of things happen. Number one, the weaknesses are two times that of any other list. Number two, opportunities if we're to agree in opportunities, it's probably one of the lists that's the shortest. And so the SWOT is a great analysis tool but if you think about all the statistics that we know that exist today, the most prominent one is the fact that most strategies fail, and they fail in

execution.

What I've done with my clients when we're putting together a strategy and rather than use a SWOT, I've changed it up to what I call the SWEAT analogy. The SWEAT analogy comes from the fact that when we're considering our organization, we're doing strategy, and we're looking at how to move forward. That consists of identifying our strengths, our weaknesses and painting employee input to this entire process or process and putting together action plans for how we're going to move forward, and then thrust behind that.

I've done a twist because again when you go back to a typical SWOT; you'll often find that the opportunities in some cases may be similar to the strengths. The threats may be similar to the weaknesses. I think it's almost redundant and I think what we need to focus more of our energy on is yes, there are strengths and weaknesses; strengths got us here, and we want to continue to capitalize on them. Weakness, we need to be aware of and we obviously need to be taking some actions to improve or resolve those if they truly matter. But what's more, important here is getting diverse inputs specifically from employees as to how they think the organization's doing because after all, they're on the frontlines and then putting action plans in place and a method to act quickly on this information in order to propel the organization forward.

Joe: *I think that brings in a kind of nice segue to my next question is, employees seem to be at the center of your thinking in the book and maybe the central point. Do you feel most companies do not utilize or as the book suggests, empower them enough?*

Shawn: The most direct way I can say this to you Joe is absolutely, yes, they do not empower employees. The reality is and again some of the points that I speak to when I'm discussing employee empowerment is the idea that if you think about today's generations, and I'm not going to make this a generational discussion, but regardless of your age today, at this point, we've got people especially in North America that are the highest educated group of employees, regardless of sector than we've ever had before. Yet we're putting them into the organization, many of which still have the management hierarchy that actually came from the military, right? We're trying to fit people into an environment that no longer matches them, their needs and more importantly, their capabilities. What we need to be thinking about is look, we have to change our way or our approach to engaging with people. We have to tap into this knowledge and experience.

I've spent a number of years of my last corporate career with Empower Generation, and it's a highly regulated industry for obvious reasons. I mean you make one mistake and things go boom, and that's not a good outcome. But the problem is that there's so much regulation, there's so much policy there're so many procedures that it drives people to turn off and not think anymore.

If you can't do what you think you need to do because you're constantly governed by, don't do this, and follow step 5 and make sure subsection 3 makes sense, then you stop thinking, and people give up. Now we have a bunch of people walking around but not really using their minds which they want to use and then we wonder, why is morale down? Why are people not productive? I just think we're trying to operate organizations with an archaic management model that's just completely upside down relative to what it should

be, if we think about people today, their level of knowledge, experience and how they actually want to engage in organizations and offer greater value.

Joe: *Boy, I struck a chord there.*

Shawn: Yes, I'm a little bit passionate about it I guess you could say.

Joe: *I think you even suggest like empowering your suppliers. Can companies do that and what suggestion do you have to create that environment?*

Shawn: Well it definitely can be done but here's what's happening. This might not make sense for a smaller company but if you're looking at any organization over let's say 20 million or even 10 million a year. You start to have people that are responsible for dealing with external suppliers, maybe you have a purchasing group or department, maybe you just have accounting handling those relationships. Here's what happens, everyday suppliers, contractors, service providers, I mean you and I can both speak to this, we're knocking on doors of companies saying, hey I've got some interesting information. I've got value to add. I'd like to talk to the people who make the decisions because I'd like to share this. If they decide it's not of interest to them, fair enough, but what happens is the door gets closed by those managing those relationships, and there's no possible way they can be in touch with all of the needs of the organization.

What we need to do is realize that any organization, service-based or manufacturing-based, a lot of their business today relies heavily on suppliers; suppliers of equipment,

Empowering Operations

Guest was Shawn Casemore

suppliers of technology, it could be suppliers of people, and if we're closing the door to meeting new sources of suppliers, then we're not able to tap into new innovations and new opportunities in the marketplace that will actually set us apart.

The experiences that I've had with my history, my career history validated this for me, so some of the work I do with clients today is we actually create forms and methods and means to tap into suppliers. For example, setting up a supplier day where we sit down, we bring executives in from the company, we ask only executives from certain key suppliers to attend, we present some of the company objectives or goals or maybe some of the challenges they're facing and we have brainstorming sessions where we ask suppliers – what would you do, how would you approach this. To them, the value is, hey they might be able to contribute to contribute something. They might be able to sell something.

There's got to be an exchange of value here. But on the flipside of that, you're able to tap into their resources, very intelligent people at typically no cost because they're more than happy to provide you that time. You're able actually to build your company through tapping into your supply base, rather than closing the door and saying, no we don't need any; we'll call you when we need it. It is again, a very upside down approach to managing the supply base because they have the next innovations for your company.

One of the companies that we've all know of and heard of that does this very well is Procter and Gamble with their Connect and Learn. They solicit through Connect and Learn the entire world to say, hey inventors, companies, the guy in the garage, you have an idea, get a hold of it, here's the process to do it. I've got colleagues, and I've also got

Empowering Operations

Guest was Shawn Casemore

clients who've actually gone through that process, now it's a slow moving animal because Procter and Gamble is huge, but it works, and they've been able to bring products to market through Procter and Gamble.

We have to start to approach our suppliers differently and not in such a regimented or a strict approach. We have to start to let them into the business and let them offer value and assistance to us.

Joe: *Well it sounds kind of like to me is we have all these sales and marketing strategies on the other side as far as key account management and different things, but you're saying that the supplier -- to me, I read that that supplier may need some hierarchy on that side to develop key account management of your suppliers and how you develop suppliers along the chain, because I think Toyota has something like that where they have like a 7-step supplier hierarchy of where they fit it. It's kind of the yin and the yang really. Should we manage them just like you're trying to manage customers on the other side?*

Shawn: Here's I guess another way to build on that or another way to look at it. If you think about those people who are in the supply chain; purchasing, contract management, those associations in education tell them, here's how to get through to your suppliers, to negotiate with them, to squeeze them. On the flipside, you've got sales and marketing folks in those supplier companies, service and manufacturing based saying, here's whom you're going to deal with. It's going to be purchasing, contract management. Here's how to get around them. Here's how to jump over them. Here's how to work through them. And we're battling one another. We're wasting time, energy and resources. If we could both

agree that hey, company A needs this value, this is what they're offering, and this is where they'd like to go, so potential future services and products, and in what the companies in the marketplace might be able to offer that and then let's create a structure, so it's not I don't have 500 people lined up at the door wanting to give me their card, but I've got a structured format for collecting information and solicitation, rather than just slamming the door on everybody's face. It is the phased approach, and it is a structured approach. But again, we're going the wrong direction. We're educating purchasing and supply chain folks to close the door, shut the door and manage them more than ever before, keep a note unless we ask for them, but if it doesn't make any logical sense at all and then we wonder, where has innovation gone? Where's the creativity? Well, it's out on the sidewalk because you wouldn't let them in.

***Joe:** I go back to Gartner saying, I think he published that statistic that a sales person is not invited to the table to 60% of the buying decisions over with, and that seems like utter nonsense to me to really select the best option for the company.*

Shawn: Yeah, exactly. I mean well in most cases, I don't speak for every company, but most cases, sales folks are highly educated on what products and services they can offer. I mean all I ever say to a CEO if I'm having this conversation is I say, think about your business today, where did a lot of your newest equipment come from? How did you learn about that? How did you install that? Where did your newest technology come from? What it typically was was a company that just would not stop in breaking through to get to the decision makers to present their products and services. Whether that means they had extensive budgets, whether the sales person themselves just had the tenacity to break

through, but that shouldn't be the way it is.

How many ever suppliers are there that just don't have the budget or the tenacity that could offer even more, and that's the question that should be keeping, to me CEO's awake at night. Wow, there might be a lot of solutions out there that I don't even know of and yet potentially we're closing the door on them. How do I create a structure to solicit to the marketplace for my needs and then I can look at those in again a structured environment where I can validate, prioritize and create a path forward. This is not a supply chain initiative; to me this is at the top of the house that needs to be created by the CEO and then acted on by those are potentially VP's.

Joe: *I forget where I heard this but I use it all the time that the customer experience mimics the employee experience, and I would say the supplier experience mimics the employee experience. Is there any truth to that?*

Shawn: Yes, I think if you take a look at any organization, all you have to do is look at the relationships that again, go back to our model. Employees, suppliers and customers, there are relationships that exist between all three of those and all you have to do is look at those relationships and when I say look at, whether your interviewing or doing group work and just having conversations, you can validate how strong your relationships are, how positive they are, how helpful each of those different parties are and connected, and that will tell you the success of the organization.

Some of my clients have me go and in and do interviews with their key customers to

Empowering Operations

Guest was Shawn Casemore

understand what's the company doing well, but, more importantly, how might they improve, what other companies are they dealing with today who might have similar products and services and if so, how do they differentiate? In this intelligence then is intelligence you can take back to the company to say, okay, how do we position ourselves differently to actually be helpful to our customers? But again, what most companies do is they rely on their sales folks, but most people in sales are not salaried, they're commissioned, and, therefore, they're not incentivized to spend a lot of time having a great dialogue with a customer other than to make a sale. You never necessarily get all of the intelligence back you need to bring stronger marketing and better operations in order to support your customer.

Joe: *Collaboration seems like the buzzword of the year or the last couple of years here, and you put some good teeth into it in the book that I've seldom seen, let me put it that way. Staying on the supplier side, what are some of the pitfalls and how can I collaborate effectively with suppliers?*

Shawn: I think the key goes back to our earlier discussion. So to start with, to me, I think the word collaboration is overused, just like the word innovation. But in every situation with the work that I do with my clients and even when I'm doing talks on some of these points, I put teeth in. Let's bring it down to the real world. What is collaboration? It's having an open dialogue between two parties that could help one another and then taking action on the items, the objectives, the ideas that come from that conversation or dialogue that will be helpful to both.

If you're a supplier to me, and you have something to offer that will help me grow my business and, in turn, I likely grow your business, that's a win-win. That's what we're looking for. That's what collaboration is all about.

If you go back to any organization that wants to collaborate with their suppliers ultimately, again it goes back to the points I mentioned earlier. We want to be forthright with what our needs are to the marketplace. We need to put that in there. Whether it's through our Website, conversations with anybody in a supply chain, purchasing, contract management role is having, one of the most successful I've seen is where a former client of mine would do an annual supplier event day. They bring suppliers out. It was a charity event but prior to the event, there was this kind of closed-door roundtable with non-compete suppliers all working with those executives and supply chain around some of the companies strategic objectives to brainstorm ideas and solutions, whether they could help or not.

You have to have a framework and structure for this, not a matter of just opening the doors, and you have to have the willingness to share. You don't have to share everything with everybody. You have to be selective, so you want to be choosing key suppliers that are important to your existing or future business. By applying those principles, you can actually create collaboration that has teeth, that has results. Go back to the idea of the SWEAT analysis, rather than the SWOT analysis. To me, it's about action. We can talk about this, but what would be the outcome? That's what truly matters.

Joe: *I get the feeling that you view an organization being this very transparent being out there and something that adds value not by adding value let's say in the traditional Porter*

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Guest was Shawn Casemore

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sense of building blocks and we add to this and put this together and everything, but more of something that attaches to things. Instead of building blocks, maybe more like a Venn-type structure or something that is just kind of -- I don't want, to say a big mess, but something like that. Am I right? Am I interpreting your book right or can you build on that a little bit?

Shawn: Sure. Well I think, your first statement, I think an organization should be very transparent: I don't know that many are. But if you go back to Porter's idea, his model around the value chain was really built around functions and roles that are necessary to deliver value. My philosophy is it comes back to the three components I mentioned earlier, which are employees, suppliers and customers and value transcends these three different components.

For example, employees in a company offer value to a customer. That could be from the product that they're building, the service they're delivering and go even deeper; that could be from how tightly the person in shipping wraps the product before it ships out the door, to ensure that it doesn't get damaged or fall over in the truck on the way. I mean you can take it as deep as you want. But in turn, the customer provides value to the employee. Obviously, from a standpoint of if we've got customers and revenue that an employee receives compensation for a job, but also the customer themselves. I've had a situation where customers have sent notes and thank you's and great feedback for employees that had different roles in the organization. So what we want to realize is that value transcends across all three of these different groups, and we need to start to approach them from that perspective, which means creating closer connections.

Empowering Operations

Guest was Shawn Casemore

When I do strategy work with clients, one of the things we do is I go out and get information from the frontline employees on how the business is doing, what they think the challenges and opportunities are for the business moving forward, and then I talk to some of the key customers. How's the company doing from their perspective? And now I bring this into the strategy session, and sorry, I also talk to key suppliers, the third component. I get feedback from all three areas. We bring that in, and that's a launching point for the strategy session.

I think from one hand, there's a school of thought that says your vision for the future of the company and your mission should be developed solely by the company. But I'm a fan of saying why would they develop a vision and mission if my customers don't want it and don't care about it. I need to create something that aligns with my customer's need both today and tomorrow and that meets with the capabilities and understandings of my employees both today and tomorrow and the only way -- and as well as the support of my supply base, my supply chain, so the only way to do that is to get their feedback and incorporate that in the strategy, to ensure that when we put this together, it's a future that is going to sustain our company and offer continuous value to the customer, the employees and the suppliers.

Joe: *Before the podcast started, we chatted a little bit, and we talked about the intermingling of those three areas that we keep mentioning: suppliers, customers, and the company. These roles are intermingling, and that person that's really managing these different areas has to overlap, kind of that Venn-type thing within the roles even*

individually now.

Shawn: I think the closer you can make connections between and I'll use one example, between employees and customer, the better off you are, I'm a big fan of cross-functional teams. I think the days of going back to our earlier points about employees that they are highly knowledgeable, experienced, they want variety in their roles and their positions, they want to progress quickly and so the way that you achieve that is by putting employees into smaller teams so that people can actually speak up and have more decision-making ability.

One employee in a group of 30 or 50 has a lot less of a voice than in a group of 5 or 10. We also need to create these collaborations between these groups. So smaller teams with employees where they have greater autonomy and ability to make decisions puts more empowerment in the hands of the employees. If they have closer connections with the customer and suppliers, understanding what customer needs are and how suppliers can help the company get there now you've got them making better decisions, faster decisions, relative to supporting what the company wants to achieve which is ultimately growth and profitability for every company that I've been to. It is really about creating these closer connections which I framed as collaboration, and I've specifically spoken in the book exactly how to do it.

Joe: *What's something that you like to add that maybe I didn't ask?*

Shawn: Going on to my last point, here's the last thing that I'll add to get your
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listeners thinking a little bit more. If you think about the fact that most companies today are built on a management hierarchy that comes from the – the military ultimately is the origin of it, when we do look at younger generations coming into the workforce today and their needs and desires, we're going to be forced here in the next five years to make considerable changes to how companies are led and how they're operated. I think the recent statistic I saw was that today, baby boomers are 29% of the working population in north America and diminishing. Generations are 22%, and millennials are 26% and increasing and expected to increase to 40% of the working population by 2020, which is less than 5 years away.

If their demands that they have today which is working in teams, working in smaller groups, having more ability to make decisions, having less expect or authority given to manager and more to the teams themselves, we're in a position where we have to start to think very quickly about restructuring our organizations to tap into the power that our employees have. Because if we don't, either A, they'll change the environment for us as they move into leadership roles or B, they won't work for us, and I think manufacturers specifically have that challenge. How do I take somebody that doesn't want to do repetitive work for 35 years and attract and appeal to them? Your robotics and automation are one answer, but that costs a fortune. All it takes is a shift in the environment we're creating for our employees. That's what my book talks to is how to create this environment, what the key areas are you need to consider in order to restructure and prepare for the future.

Joe: *I think you give some great advice in the book, and I look forward to reading it a second time. I encourage everybody to take a look at Operational Empowerment. What's*

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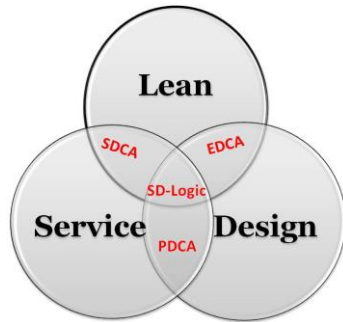
Guest was Shawn Casemore

the best way for someone to learn more about Casemore and Company and also contact you?

Shawn: Probably the easiest is through my Website at casemoreandco.com. I'm also on Twitter @shawncasemore and of course, you can find me on LinkedIn as well.

Joe: *Well I would like to thank you very much, Shawn. I appreciate it. This podcast will be available on the Business901 iTunes store and the Business901 Website. Thanks again Shawn.*

Shawn: Thanks, Joe.



Joseph T. Dager

Business901

Phone: 260-918-0438

Skype: Biz901

Fax: 260-818-2022

Email: jtdager@business901.com

Website: <http://www.business901.com>

Twitter: [@business901](https://twitter.com/business901)

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

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