Strategic Aspects of Team Building

Northeast Supply Chain Conference – 2005

People Work more effectively in Teams
Developing a Project Oriented Organization is a Monumental Change in most Businesses
“The companies that find a way to engage every mind, harness every volt of passion and energy, bring excitement to the lives of the people and break every artificial barrier between people, will be the companies that win in the 90’s and beyond.

Jack Welch, G.E.
COMMUNICATING THE STRATEGIC PLAN

• Teams Need to Understand the Company Strategy

• Problems, Issues and Objectives must Relate to the Strategy

• Managers and Supervisors Help Interpret Strategic Plans
DEMONESTRATING COMMITMENT

- Management involvement
- Providing resources
- Education / training to meet the need
- Allowing people to try something new
- Encouragement
- Avoid standardized solutions
THE FOUR STEPS

THE OVERVIEW

1. Define the problem thoroughly
   Determine its complexity
   Keep it as simple as possible & Establish Objectives

2. Analyze known information
   Verify and Prove the current conditions
   Study the details and Determine the most likely cause(s)

3. Research Causes and Develop more detailed information
   Drive to Root Cause(s)
   Recognize symptoms and Substantiate causes

4. Execute by Defining the solution
   Developing a plan of action
   Implement and Verify that issue was Resolved and the Objectives met

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MANAGEMENT STYLE AND PROBLEM SOLVING

- Supervisors become coaches and/or team members
- Teams required only guidance via business plan, strategy and objectives
- Managers facilitate, assist and guide the overall effort
- Look for the cause rather than place blame
- Performance evaluations become heavily based on team-based problem solving accomplishments
- Identified problems are incorporated into individual yearly objectives.
# The 4 Step Problem Solving Process from HELL

<table>
<thead>
<tr>
<th>Step</th>
<th>Define</th>
<th>Analyze</th>
<th>Research</th>
<th>Execute</th>
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<tbody>
<tr>
<td>1</td>
<td>Define the Problem/Issue/Goal and Establish an Objective</td>
<td>Analyze Known Information and Develop Potential Causes</td>
<td>Research - Drive to Root Cause and Prioritize</td>
<td>Execute - Define Solution, Action Plan and Verify</td>
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<tr>
<td>2</td>
<td>RECORD THE PROBLEM</td>
<td>OBSERVE THE PROCESS</td>
<td>FOCUS ON MOST PROBABLE CAUSE</td>
<td>DEFINE THE OBVIOUS SOLUTION</td>
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<td></td>
<td>ENSURE THE OBJECTIVE</td>
<td>DIRECT RESOURCE PRIORITIES</td>
<td>SUBSTANTIATE EACH LEVEL OF CAUSE</td>
<td>DEVELOP TIMEFRAMES</td>
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<td>3</td>
<td>CONSIDER REDUCING THE SCOPE</td>
<td>ESTABLISH TIME FRAME</td>
<td>SEPARATE SYMPTOMS FROM CAUSES</td>
<td>ESTIMATE RESOURCES REQUIRED</td>
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<td></td>
<td>QUANIFY THE OBJECTIVE</td>
<td>STUDY THE PROCESS</td>
<td>IDENTIFY PREDOMINANT CAUSE</td>
<td>DEFINE SOLUTION RISKS</td>
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<td>4</td>
<td>RELATE TO BUSINESS STRATEGY</td>
<td>ASSEMBLE COSTS</td>
<td>CONSIDER TREATING THE SYMPTOM</td>
<td>IDENTIFY SOLUTION RISKS</td>
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<td></td>
<td>RELATE TO BUSINESS STRATEGY</td>
<td>IDENTIFY COMPLICATIONS</td>
<td>UPDATE COST/BENEFIT ANALYSIS</td>
<td>DOCUMENT STEPS</td>
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<td>ASSESS THE OBJECTIVE</td>
<td>DIAGNOSE THE PROCESS</td>
<td>PROVE ROOT CAUSE</td>
<td>CONTROL CHART</td>
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<td></td>
<td>RELATE TO BUSINESS STRATEGY</td>
<td>IDENTIFY REQUIRED INFORMATION</td>
<td>ACQUIRE KNOWLEDGE</td>
<td>PROJECT PLAN</td>
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<tr>
<td>5</td>
<td>ASSESS THE OBJECTIVE</td>
<td>CATEGORIZE CAUSES</td>
<td>CAN YOU AFFECT THE CAUSE?</td>
<td>PROBLEM SOLVING DATABASE</td>
</tr>
<tr>
<td></td>
<td>ASSESS THE OBJECTIVE</td>
<td>ASSESS THE OBJECTIVE</td>
<td>ACQUIRE KNOWLEDGE</td>
<td>PROBLEM SOLVING DATABASE</td>
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**Tools**
- Team Charter
- 5S
- Meeting Management
- Kaizen
- Process Map
- Brainstorming
- Dendogram
- Fishbone Diagram
- 5S
- Process Map
- Control Chart
- Project Plan
- Problem Solving Database
CLARIFYING THE STRATEGIC BUSINESS PLAN

- Focusing on external customer needs
  (Define the perspective of the customer)
- Understanding quality objectives
  (Where are we now, where should we be?)
- Optimize resources
  (Apply resource to high priority issues)
- Clearly state lead time goals
  (What are they actually, what should they be?)
- Clarify inventory goals
  (How much and where?)
- Understanding product life cycles
  (How long do product configurations last?)
SUMMARY OF DESCRIBING A PROCESS

1. Define the limits of the process
2. Flow chart the process
3. Develop a process map (detail the complicated or constrained steps)
4. Detail may be pictures, video or verbal description
5. Analyze for non-value added steps
6. Gather and present data (productivity, quality, capability study, etc.)
7. Document areas of concern
8. Determine areas requiring more study
PROMOTING INNOVATION

• The best solutions address numerous causes
• Change company policy
• Go into a different market
• Apply new technology
• Brainstorm “wild” ideas
• Get “crazy”
TEAM CREATIVITY

- There are revolutionary thinkers in every company
- Look for foresight in people
- No business is mature
- Tell teams that they can be creative
- Couple creativity with hard work
  (Combination is worth 40-50 IQ points)
- Train people to be activists
- May require a deep diagonal slice through the organization
- All employees deserve a voice in the destiny of the company
BREAKTHROUGH IMPROVEMENTS

• The “Prowler”
• Satellite telephones
• The Internet
• Each new Intel chip
• The “Hovercraft”
• Combination electric / gas vehicles

All lead to creating wealth for employees and stockholders
PROVIDING THE ENVIRONMENT FOR CREATIVE THINKING

- Training to allow people to be creative
- Provide for outside influences (magazines, books, seminars, professional organizations, etc.)
- Make time available
- Supply necessary resources
- Let people challenge the rules
- “The Creative Room”

(A new, creative idea is a fragile thing)
# PROBLEM SOLVING TOOLS

<table>
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<tr>
<th>Section</th>
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<tbody>
<tr>
<td>Team Charter</td>
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<td>5 S - Workplace Organization Steps</td>
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<tr>
<td>Ten Kaizen Principles</td>
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<tr>
<td>Meeting Management</td>
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<td>Purposes of Meetings</td>
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<tr>
<td>Determining Who Should Attend</td>
<td>6</td>
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<tr>
<td>Initiating a Project, Task, Objective, Etc.</td>
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<td>General Guidelines for Participants</td>
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<td>Brainstorming</td>
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<td>Brainstorming Rules</td>
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<td>Brainstorming Process</td>
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<td>Brainwriting Form</td>
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<td>Dendogram</td>
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<tr>
<td>Cause and Effect Diagram - (Fishbone)</td>
<td>21</td>
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<td>Cause and Effect Diagram</td>
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<tr>
<td>Cause and Effect Diagram - Blank</td>
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<tr>
<td>Ask 5 Why’s</td>
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## TEAM CHARTER

### STATEMENT OF ISSUE, PROBLEM, TASK, ETC.

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### OBJECTIVES OF THE EFFORT

**Quantitative Improvements:**

**Estimated Time Frame:**

**Interim Measurements:**

### CORE TEAM MEMBERS

**Leader:**

**Facilitator:**

**Others:**

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### ORIGINATOR

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### ADDITIONAL GOALS

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### ESTIMATED RESOURCES

**Human:**

(Skill Type and Days)

### TEAM CHARTER - CONTINUED

### INITIAL PLAN

**Meeting Frequency:**

**Action Items:**

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### CURRENT KNOWLEDGE OF ISSUES, CAUSES, SYMPTOMS, ETC.

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### TEAM SIGNATURES

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<th>DATE</th>
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### STEERING COMMITTEE/ SPONSOR SIGNATURES

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<th>NAME</th>
<th>DATE</th>
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HELLE ASSOCIATES - Business Management Education and Consulting - West Boylston - Massachusetts - 888-835-4152
<table>
<thead>
<tr>
<th>JAPANESE</th>
<th>LITERAL TRANSLATION</th>
<th>ENGLISH EQUIVALENT</th>
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<tbody>
<tr>
<td>Seri</td>
<td>Straighten up and Organize</td>
<td>Sort</td>
</tr>
<tr>
<td>Seiton</td>
<td>Put things in order and arrange</td>
<td>Store</td>
</tr>
<tr>
<td>Seigo</td>
<td>Clean up workplace</td>
<td>Shine</td>
</tr>
<tr>
<td>Seiktse</td>
<td>Personal neatness, orderliness</td>
<td>Status Quo</td>
</tr>
<tr>
<td>Shitsuke</td>
<td>Discipline to follow procedures</td>
<td>Stick to It</td>
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</table>
TEN KAIZEN PRINCIPLES

1. Get rid of old assumptions
2. Don’t look for excuses, look for ways to make things happen
3. Say “No” to the status quo
4. Don’t worry about being perfect -- even if you only get it half right, start now
5. It doesn’t cost money to do Kaizen
6. If something is wrong, fix it on the spot
7. Good ideas come when the going gets toughest
8. Ask “Why” five times to get to the root cause
9. Look for wisdom from ten people rather than one
10. Never stop doing Kaizen
MEETING MANAGEMENT

PURPOSES OF MEETINGS

• Education, Training, Learning, etc.
  – Dominated by Presenters
  – Questions for Clarification
  – Attendees Listen and Learn
  – May Be Sales Oriented

• Information Transfer
  – Typically Updates on Tasks
  – Presentation Oriented
  – Dominated by Designated Presenters
  – Some Interaction for Clarification

• Development, Problem Solving, New Systems, etc.
  – Planning
  – Brainstorming
  – Discussion
  – Multiple Contribution
  – Consensus
  – Decision Making
  – Reaction Oriented
  – Evaluations

• Combination Meeting
  – Meeting May Be Segmented
MEETING MANAGEMENT
DETERMINING WHO SHOULD ATTEND

• Those who can affect decisions
• Those who have skills or knowledge
• Those involved in the action phase
• Those who are affected by the outcome
• Those who can enhance the process
MEETING MANAGEMENT

INITIATING A PROJECT, TASK, OBJECTIVE, ETC.

- Discuss Frequency of Meetings
  - Regularly Scheduled
  - On Call
- Discuss Desired Length of Meetings
  - Shorter Is Better
  - 50 Minute Hours - 20 Minute ½ Hours
- Attendees of Meeting
  - Full Team
  - Core Team
  - Isolated Task Team

- Purposes of Meetings
  - Education, Training, Learning, Etc.
  - Information Transfer
  - Development, Problem Solving, New Systems, Etc.
  - Combination Meeting
MEETING MANAGEMENT

GENERAL GUIDELINES FOR PARTICIPANTS

• Be Receptive To Other’s Ideas
• Show Respect For Others
• Do Not Drive A “Stake”
• Avoid Side Discussions
• Be Prepared
• Minimize Joking
• Do Not Interrupt
• Offer Your Opinion
• Focus On The Meeting Purpose
• Decide To Be A Contributor
MEETING MANAGEMENT

• OBJECTIVE
  – Clearly stated in advance
  – What part does each play

• PURPOSE
  – May be different than objective
  – Clearly stated in advance

• TIME FRAME
  – Start and finish
  – Interim times allocation
  – Consider 50 minute hours

• START ON TIME
  – Everyone arrives on time

• FINISH ON TIME

• PUBLISHED NOTES
  – Assigned scribe
  – Who does what by when
  – Use Meeting Record format

• Determine if a facilitator is required
MEETING MANAGEMENT

- Review conclusions
  - Consensus
- Assignments for next meeting or project
  - Accepted
- Everyone is allowed to participate
  - Address serious objections
- Keep on track - Avoid Distractions
- Listening more than talking
- Mediating
- Critics should be positive
- All should observe the process
MEETING MANAGEMENT

TYPICAL REASONS FOR INEFFECTIVE MEETINGS

• Participants are not prepared
• Agenda not published or understood
• Unclear purpose
• Decision makers are not present
• The process isn’t focused
• Meetings last too long
• Participants lose interest
• Too many meetings
• Inadequate notice
MEETING RECORD

<table>
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<th>DATE:</th>
<th>TIME:</th>
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GROUP OR TEAM NAME: ______________________________

RECORDER: ____________________  TEAM LEADER: ____________________  FACILITATOR: ____________________

PRESENT

TEAM MEMBERS: ____________________  OTHERS: ____________________

MEETING OBJECTIVE

(As Previously Announced)

MEETING AGENDA

(As Previously Announced)

TOPIC(S): ____________________

PROGRESS SINCE LAST MEETING:

<table>
<thead>
<tr>
<th>WHO</th>
<th>ACCOMPLISHED WHAT</th>
<th>WHEN</th>
<th>RESOURCES USED</th>
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ACTION PLAN

(See Subsequent Pages)

WHO

<table>
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<tr>
<th>Individual or Task Team</th>
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WHAT

Description of what is to be accomplished

<table>
<thead>
<tr>
<th>WHEN</th>
<th>Resources Required</th>
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ADDITIONAL COMMENTS

NEXT MEETING

DATE: ____________________  TIME: ____________________

AGENDA: ____________________

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PROCESS MAP
BRAINSTORMING

- Free Wheeling
- Idea Gathering
- Everyone Participates
- Based on “One Idea May Trigger Another”
- Group Creativity Better than One
BRAINSTORMING RULES

1. No one criticizes anyone else’s idea
2. A quantity of ideas is the immediate objective
3. Each person can offer an idea in turn
4. If you have no idea at the moment, say “Pass”
5. Scribe is NOT allowed to interpret
BRAINSTORMING PROCESS

- Scribe records all ideas
- Process continues until all ideas are exhausted
- Combine like items by consensus
- Determine which items (potential causes) are Most likely or highest priority
- First round of voting, members vote for all ideas they like
- Second round of voting, members vote for items having the most votes in first round. Member has only one or two votes
BRAINWRITING

• Distribute a piece of paper with twenty-one squares
• Each member writes down three ideas
• Draw a new paper from the pool and add three more ideas
• Exchange papers until each member’s form is nearly full
• Have members read aloud in a round robin the ideas on the form
# BRAINWRITING FORM

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**DENDOGRAM**

A Dendogram is used to break a problem down to an actionable level. Where a fishbone goes in a lot of different directions, a dendogram uses one idea and breaks that down to a level where it can be worked on.

A Dendogram is a series of questions and answers.
- You must write how you reached the answer.
- Each answer must be backed by fact.

Example:  Why does this happen?  This happens because . . . We know this because . . .

<table>
<thead>
<tr>
<th>QUESTION</th>
<th>ANSWER</th>
<th>FACT</th>
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</thead>
<tbody>
<tr>
<td>Why won't the car start?</td>
<td>The battery is dead</td>
<td>We checked everything else</td>
</tr>
<tr>
<td>Why is the battery dead?</td>
<td>The alternator is not working</td>
<td>We checked it with a meter.</td>
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</table>

By asking questions and basing your answers on fact, you can break it down to where the root of the problem lies. Now you can find the best solution for the problem.

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<thead>
<tr>
<th>QUESTION</th>
<th>ANSWER</th>
<th>FACT</th>
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<tbody>
<tr>
<td>Why did the alternator stop working?</td>
<td>It got old</td>
<td>We last replaced it 10 years ago.</td>
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</table>
CAUSE AND EFFECT DIAGRAM (FISHBONE)

- Provides an opportunity to divide the problem into major types of elements
- Provides a formal process to begin driving to root cause
- Establishes an on-going graphical record of the process
- Eliminates the possibility of losing focus and status
- Each structure may have back-up data to support conclusions
CAUSE AND EFFECT DIAGRAM

SYSTEM

MATERIALS

MACHINERY

OTHER

HUMAN

METHOD

PROBLEM
ASK
5 WHY’S
Thank you

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