

A3 Coaching Strategies

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**Michigan Lean Consortium Annual Conference
August 7 & 8
Traverse City, Michigan**

Oil Change A3 exercise

- You own a car dealership
- I will be the service manager
- I am going to present an A3 to you focused on reducing the time to do an oil change

- With the post-it notes at your table, please write down three questions you would ask me

- Wait until I complete presenting the A3 to write your questions; take notes directly on your copy of the A3

Theme: Reduce Oil Change Time

Owner: EME

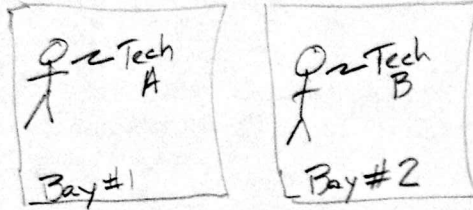
Mgt:

DATE: 2013.10.30

Background: Oil change times are too long, leading to customer dissatisfaction.



Current Situation: Current change time @ 45min

- ▷ 2 techs
- ▷ Each has own dedicated service bay
- ▷ Oil changes are performed w/ cars lifted



Goal: Reduce oil change time from 45min
Implement a new employee selection & training process

Analysis:

- | | |
|---|---|
| 
Tech-A | 
Tech-B |
| ▷ almost @ goal | ▷ Slow, not near goal |
| ▷ needs to focus | ▷ Needs to learn from tech-A |
| | ▷ Sent to corporate dealer tech training |

Recommendations:

- ① Match breaks & lunch time
↳ provides focus to Tech-A
↳ reduces Tech-B times
- ② Have tech-B observe & learn from Tech-A
- ③ If tech-B's performance doesn't improve in 6 weeks, interview, hire & replace Tech-B

Plan:

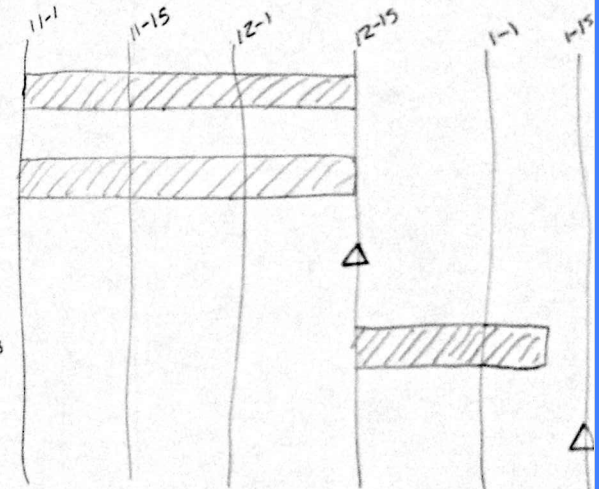
Service mgr monitor breaks

Tech-B observation & improvement

Check Tech-B perf

Begin interviews

Hire new



Follow-up:

- ▷ Service mgr to continue to monitor throughput & get feedback from writers

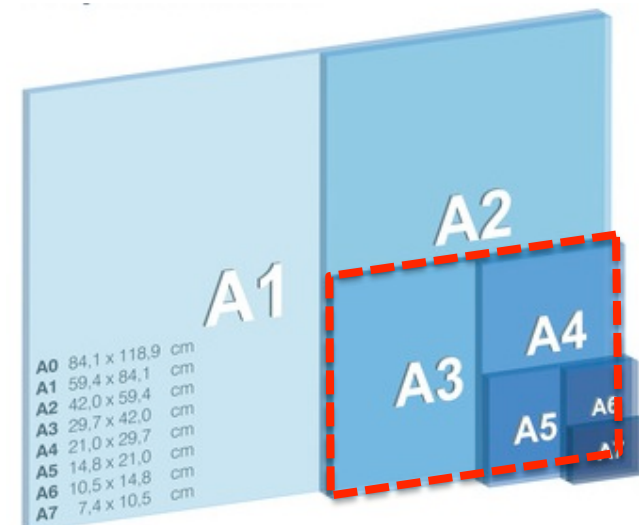
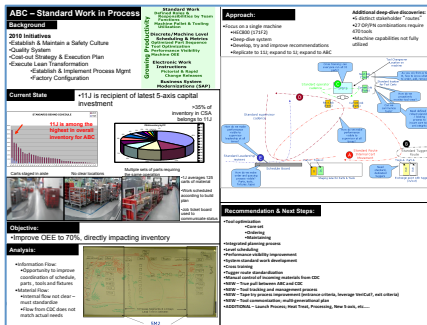
What can we achieve in 2 hours

- Why use & what is the A3?
- Mentoring dynamics
- Coaching strategies
- Monday morning

WHY & WHAT– THE A3

What is the A3: Common Knowledge

- **The Tool:**
 - A3 is just a paper size
 - Began in the auto industry as the Quality Circle problem solving format
 - Tells a story which anyone can understand
 - UNDERSTAND means follow the logic all of the way through
 - All on one sheet of paper



What is the A3: Uncommon Knowledge

- **The Process & Thinking behind the tool**
 - Engages the organization, creating alignment
 - Develops people while doing the work
 - A3 owners
 - Leaders / coaches
 - More effectively “solves” problems
 - Limited space = respect for stakeholders
 - 5S for information

A3: The business case

- We are going to learn why organization should utilize the A3 process by considering:
 - A definition of lean & it's relationship to problems
 - Project failure
 - The role of leadership

Problems are everywhere

The gap between....

...where you are....



....and where you want to be....

...is a problem

I have news for you, **Lean** is going to make you see **MORE** problems

- With standardization at its foundation and making those standards visual, **lean** makes even more problems visible – to you, and everyone else
 - Not bad: they were always there
 - You just couldn't see them
 - Now you can
- And since you are here I think your organization is committing to **lean**

Enough problem solvers?

- If lean reveals more of the problems that already exist in your organization,
- Do you have a process to develop more problem solvers?

The A3 is that process

When your organization began it's lean journey, what processes were focused on first?



Why?

- Easy to see the work

When you solve a problem, where is the actual work happening?

- In your brain



So, if improvement is fostered by making the work easy to see, do you have a process that makes **THINKING** easy to see, helping you to develop people while they do their work?

The A3 is that process

Where are we?

- We need MORE problem solvers
- We need to be able to see their thinking to better develop them
- What could make your problem solvers even more effective? Let's consider why projects fail.

Why do projects fail?

- **Success =**
 - **On-time**
 - **Within budget**
 - **Addressed the issue**

Take 2 minutes to write down three reasons individually

As groups, take 5 minutes to discuss what you wrote down and reach a consensus on the one most significant cause.

Why?

Lack of follow-up Varying interpretations

Scope creep Not enough time Agreement

New “fire” erupts

Lack of support from top management

Wrong team members

Lack of resources Poor planning

No buy-in Target poorly defined

Leaders change

Do you have a process

- That gains alignment & agreement?

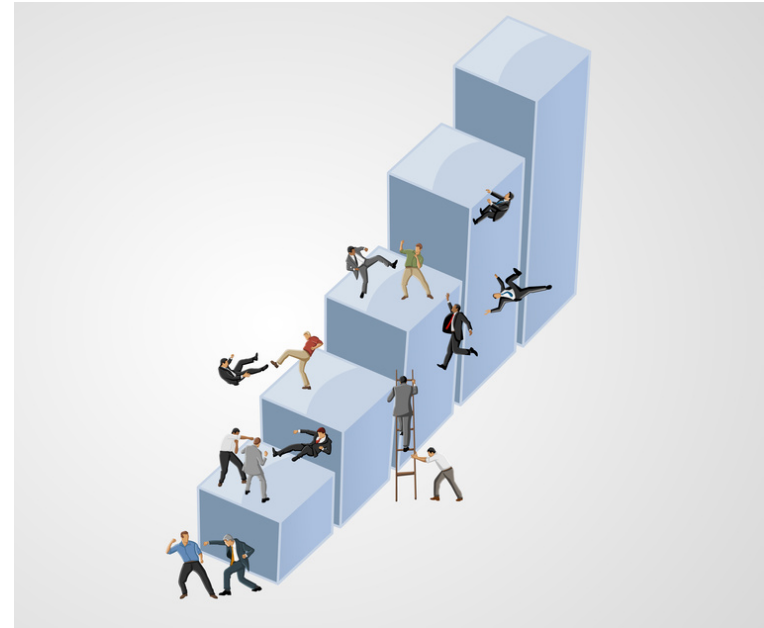


The A3 is that process

Tool vs. Process

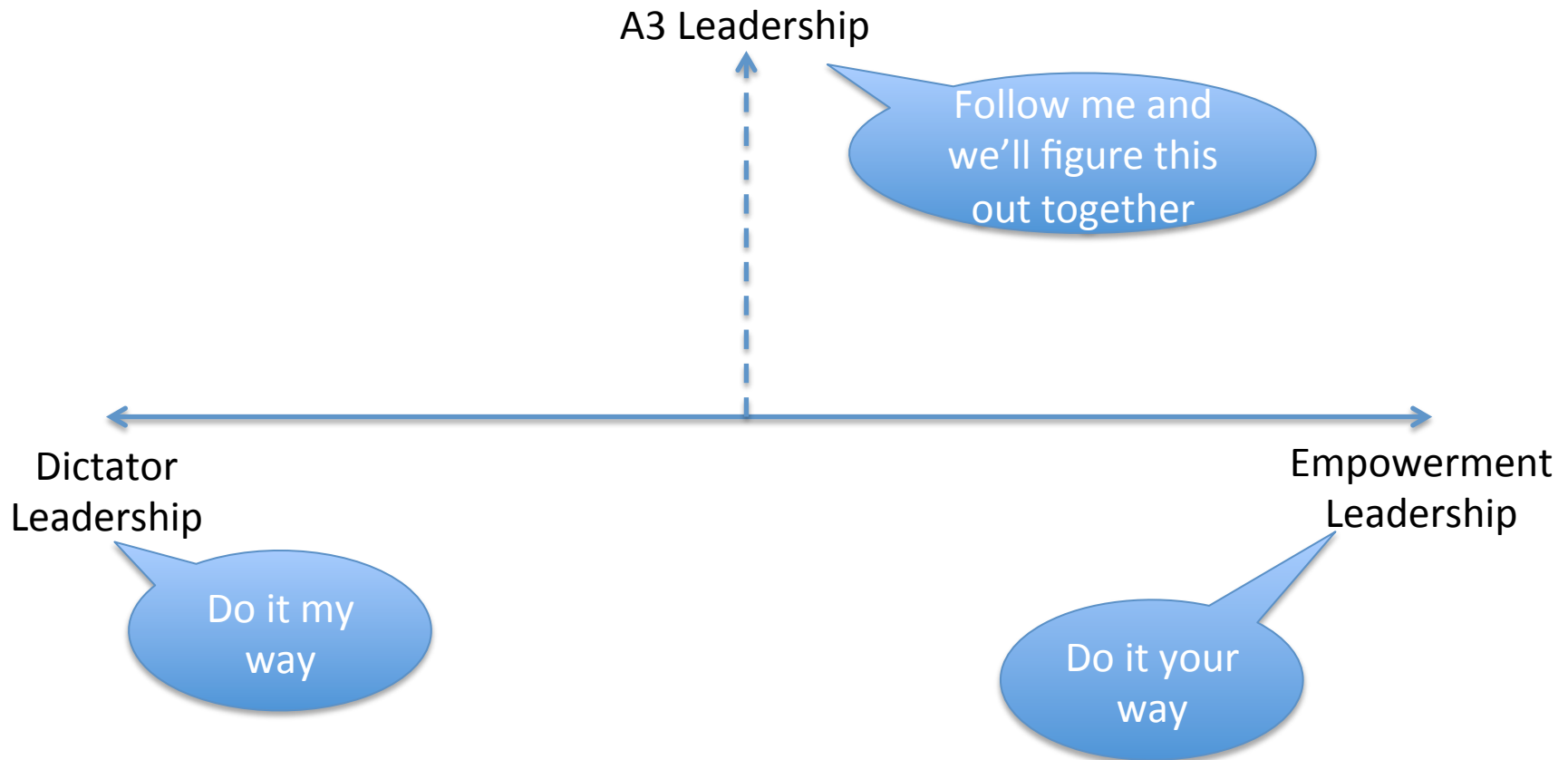
- Think of the A3 as less of a tool
- And more of a process that:
 - Gains alignment & agreement within the organization
 - Develops thinking & effective problem solvers while getting the work done
 - Solves problems
 - And enables quick sharing of lessons learned





MENTORING DYNAMICS

The Leadership continuum



Let's look at what is meant by each of these

The “Dictator”: What happens when we tell people what to do?

We will hold the world
ransom for one MILLION
dollars!

- 1. We deprive them of the opportunity to think.**
- 2. You take the responsibility away.**
- 3. They might do it (and you might be wrong!).**

The “Empowerer”: What happens when we provide results targets and get out of the way?

- 1. Sub-optimization**
- 2. Waste resources (positive harm)**
- 3. Short-term benefits if any**
- 4. Loss of direction and control**

The A3 style and achieving organizational goals



- I will help you find the way
- But you are still going to have to do the work

Follow me and we will figure this out together

The Leader's challenge

- Too specific
 - Dictator
 - No ownership



- Too vague
 - Empowerment
 - No direction



The Lean Leader's Challenge

- **Make assignments clear enough that the subordinate can approach the task with confidence.**
- **Yet, open enough that responsibility is not taken away.**
- **So the subordinate has clear responsibility to propose solutions with a sense of entrepreneurial ownership.**

Clear direction with clear ownership

A3 dynamics

Our focus



Coach



Author



Peer

A3 Coaching Strategies

- Practice humble inquiry
 - Pure inquiry
 - Diagnostic inquiry
 - Prompting inquiry
 - Coaching process inquiry
- Keep a diary (PDCA)
- Become a better writer
 - The clear logical thread
 - Learn how to share
- Practice, Practice, Practice – all of the above

PRACTICE HUMBLE INQUIRY

What would Edgar do?

- Edgar Schein
- “Grandfather” of organizational development
- Professor Emeritus at the MIT Sloan School of Management
- Credited with creating the term “corporate culture”
- Author of the book, “[Helping: How to offer, give and receive Help](#)”
- We can learn a lot from him on this basic human act
- **Four kinds of questions**

The type and focus of questions should shift depending on where we are in the problem solving process

Grasp the situation:

Recommendations:

Analysis:

Action Plans:

Follow-up:

Four kinds of questions : Edgar Schein

1. Pure Inquiry (framing the problem)
 - “What is happening”
 - Builds confidence and status in the learner
 - Creates a safe situation to share
 - Fosters ownership
 - SOME Examples:
 - Why is this important to talk about?
 - How will this help the business?
 - What is happening?
 - How does the process work?
 - Exactly what problem are you trying to solve?
 - What have you looked at or heard?
 - Is this the entire process?
 - What is your goal?
 - How are you going to measure that?

Four kinds of questions : Edgar Schein – contd'

2. Diagnostic Inquiry (digging for root cause)
 - “Why is it happening?”
 - Focuses attention on the elements
 - Builds new diagnostic skills
 - Causes the learner to think about new areas
 - SOME Examples:
 - How did you arrive at this?
 - Why did you select that approach?
 - How has this tool helped the analysis?
 - What makes you sure you have a cause / effect link?
 - How does this tie back to the goal?

Four kinds of questions : Edgar Schein

3. Prompting Inquiry (considering options)
 - “What would happen if....”
 - Produces new hypothesis options
 - Insures linkages
 - SOME Examples:
 - What have you looked at or heard?
 - What have you thought about trying?
 - How do these options tie back to the root cause?
 - What are the pro & cons of these options?
 - How did you select this option from the many?
 - What does the future state process look like?
 - What steps are needed for implementation?
 - Are things going according to plan? Why? Why not?
 - How long will you track your changes to insure effectiveness?
 - How will you sustain your gains?

Some helpful questions – not all inclusive

Grasp the situation:

- What is happening?
- How does the process work?
- Is this the entire process?
- Exactly what problem are you trying to solve?
- Tell me more?
- Have you told me everything?
- Can you describe what's happening versus what should be?
- What have you looked at or heard?

Analysis:

- What makes you sure you have a cause / effect link?
- How did you arrive at this?
- How has this tool helped the analysis?
- Why did you select that approach?

Recommendations:

- What have you looked at or heard?
- What have you thought about trying?
- How do these options tie back to the root cause?
- What impact do you expect that countermeasure to have?
- What are the pros & cons of these options?
- How did you select this / these particular options from the many?
- What does the future state process look like?

Action Plans:

- How will that step impact the gap to the goal?
- Are things going according to plan? Why or why not?
- How will you track changes to insure effectiveness?
- What steps are needed for implementation?

Follow-up:

- Was the goal achieved? Why or why not?
- How are you going to insure ongoing success?
- Are there any open issues?
- Is there an opportunity to replicate / share?

Let's look at the questions you "asked" about the Oil Change A3

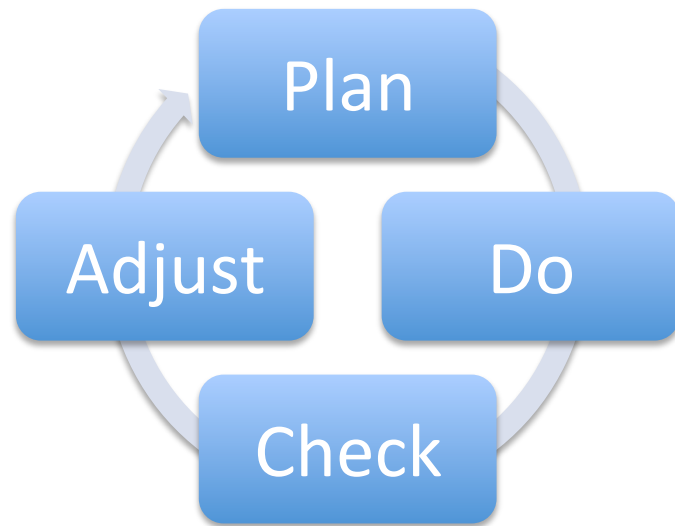
A3 Coaching Strategies

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- **Keep a diary (PDCA)**
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Four kinds of questions : Edgar Schein

4. Coaching Process Inquiry (reflecting)
 - “What is happening between us, right now?”
 - Focuses on how the learner / mentor process is working
 - SOME Examples:
 - Are my questions helping?
 - Are we getting anywhere?
 - How do you think the conversation is going so far?

Keep a “diary”

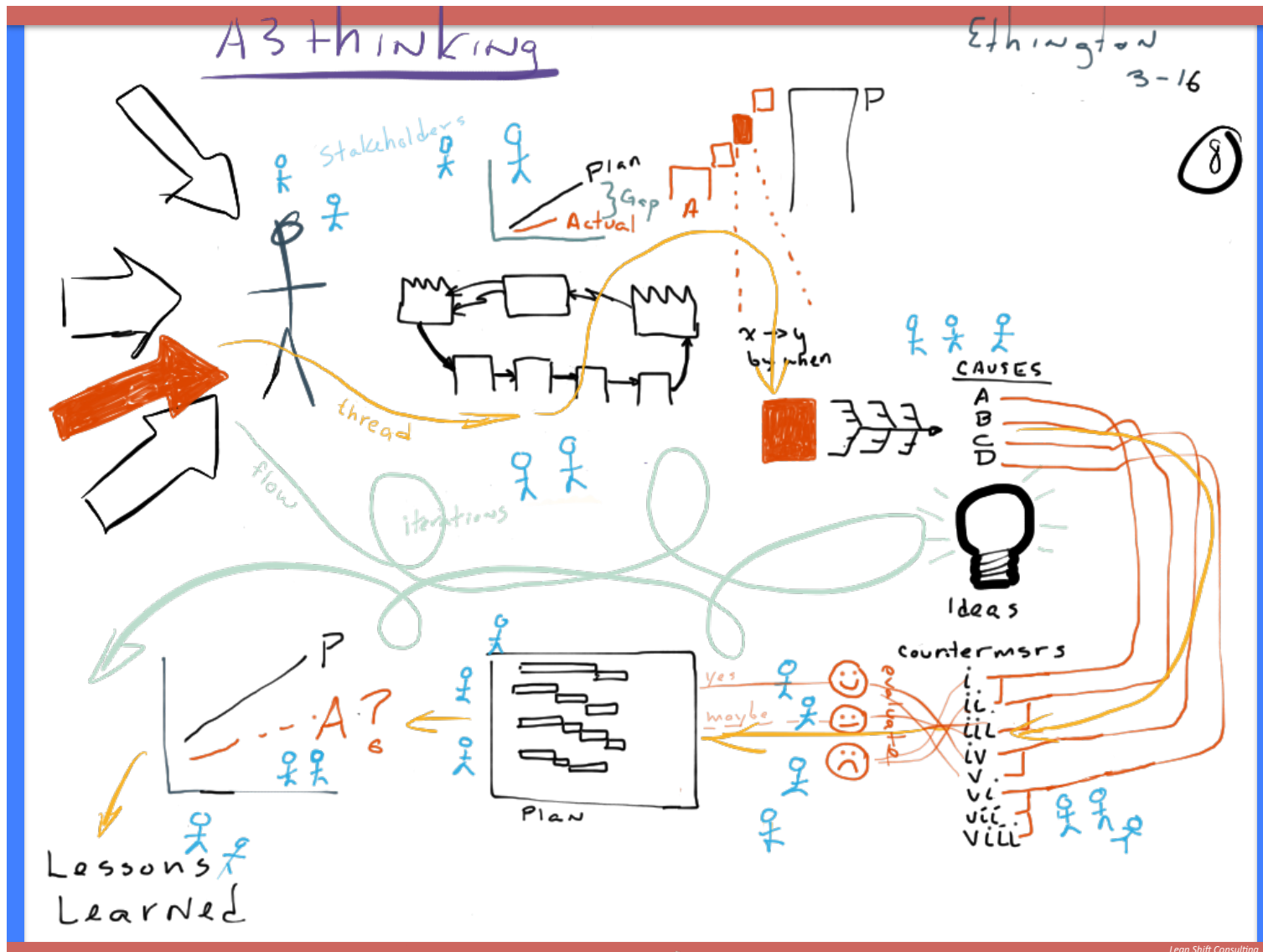


A3 Coaching Strategies

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- **Become a better writer**
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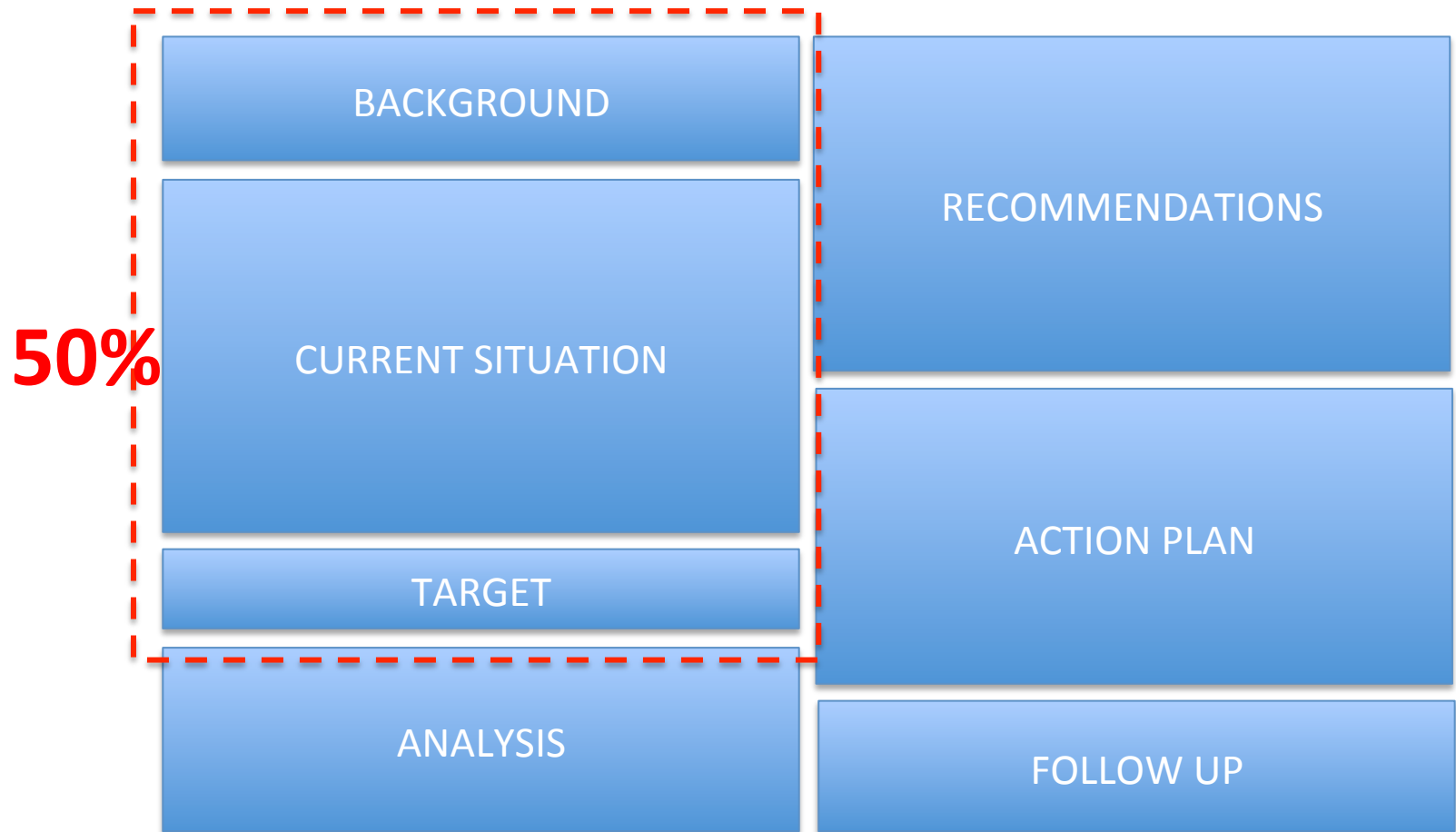
Become a better writer: The clear logical thread



Learn how to share

- 50% and go
- Share, don't present
- Messy is okay
- Small lot works with A3's too
- Captured dialogue = instant meeting minutes\

50% and go



Share, don't present



It's your portable white board

Messy is okay

Theme - Operating System Leadership thru TUSA research EE, DS, NZ 12/15/10

Background
LEI mission: Advance Lean Thinking throughout the world
Educational VS Publishing VS Research VS Conferences VS

Observation: Many companies gain competency in focused areas, but plateau in performance. Lack of an integrated system linking tools & leadership into a comprehensive operating system is a common factor

Current Situation
Partnership Timeline - 2006 to 2010 Today
Completed: Medtronic, Cardinal, UMS
In progress: Johnson & Johnson, GE, Siemens

Goal
Leverage the Lean Enterprise Partnership to fulfill LEI's mission

Analysis
Tools Age: [Diagram showing transition from old tools to new tools]
Leadership Age: [Diagram showing transition from old leadership to new leadership]

Reflections
- Add the internal control dates to the top of each page
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Goals
1. Continue LE development up to 10 card dates next #2
2. Bridge current LE's w/ new #2
3. Utilize 100% of paid-for capacity
4. Knowledge capture? Do we have a process? Publications? Case study activity? Symposium? (LEI website) (TS)

Strategy
1. Public w/s - provide periodic notifications of upcoming w/s w/ quarterly
2. Summit - provide the theme: who are best card dates? who do we need to engage to drive this plan?
3. Partner w/s - 10 all 12 card dates now - set on calendars - CAH manage drop/add/exceptions internally

Stakeholders
Schroeder, Ehrenfeld, Ehinger, Raposa, Richardson, Shook, Verble

Version #1: 07/10/12

Process Step	Component	Output/Lead Fulfilled
1) User Community	1) User Community	Emerges, Enables Learning, Growing Lists
2) Dojo	2) Dojo	Easy to use, Provides quality info, Timely responses, Interesting
3) Columns	3) Columns	Easy to use, Provides quality info, Timely info for users, Interesting
4) Columns	4) Columns	Easy to use, Provides quality info, Timely info for users, Interesting

Design to support needs

2) User interface

3) Paid App link

4) Paid App link

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Small lot works with A3's too



Captured dialogue = instant meeting minutes

Clarification points

Alignment with other initiatives

LEI Partnership Strategy

Enterprise Partnership created in 2006 to promote:

2. Research and development for business process transformation
3. Development with partner companies to create the lean enterprise
4. Documentation of process of transformation (individual & organizational)
5. Partnerships for growth and self-sustainment
6. Partnerships for CI methods and implementing bottom-line improvements

2012 Support Program: Lean Leader Development Program: NOTE: LLD activities targeted towards business needs

Overall *Point 5*
 Total learning attendance = 218
 Total learning hours = 3084
 LEI @ corporate leadership events = 0
 Seats at Partner W/S = 5(1)/ 12
 Seats at annual summit = 2/4
 Seats at public W/S = 18(2)/24

RESULTS:

1. Improving Lean Leader assessments:
 - 37% improvement in participants overall
 - 92% shift from "does not meet" to meets or exceeds
 - 33% of LL's "meet" expectation; 66% of LL's "exceed" expectations
 - VSM weakest element across participants
 - External communications highest amongst all participants
 - 6/6 LL's value the program
 - 5/6 Business leaders value program
 - 1 Business leader is nominating another person this year
2. General Lean Leader development results
 - Pilot felt to be successful
 - Process is and continues to be documented
 - Specific project impacts to be collected
3. Overall Cardinal results
 - Transactional OSA pilot successful; materials updated

INITIALS: DATE 1/18/2013

REFLECTIONS:

Positives:

- Lean Leader program- Detailed timing plan helpful for schedule
- HR involvement a key success factor
- Feedback is positive
- Bi-weekly calls necessary and helpful (w/Coach) Partner workshops

Overall:

- Good use of public workshop seats (75%)
- Continued exposure to LEI for many employees
- Both parties remain open to "experiments"

Opportunities:

- Lean Leader program- Add key dates to timeline
- Hold kick-off earlier (Feb)
- How are we recognizing participants?
- Align assessment to 12 capabilities; simplify
- Align internal professional eval with LL pgm

Overall:

- Improve utilization of w/s & summit seats
- Improve utilization of LEI at leadership events

GOALS:

1. Continue LL development (up to 10 candidates)
2. Engage current LL's with wave#2
3. Engage top ex leaders as LL coaches in wave#2 as needed
4. Utilize 100% of paid-for capacity
5. Formalize knowledge capture for:
 - A. internal use
 - B. if desired, sharing with partner companies
 - C. if desired, external sharing / publicity
6. Set a long-term vision for the partnership (2-3 years)

STRATEGY:

A. Timeline in-process for goals 1, 2 and 3

Activity	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Organizational Meeting												
Public Workshops												
Partner Workshops												
Summit												

B. Improve effectiveness and robustness of planning and communications (goal 4)

C. Leverage LEI resources for improved knowledge capture and sharing (goal 5)

D. Continue to dialogue this A3 (goal 6)

Would they do it again?

Do we need a routine cadence?

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Some final thoughts on coaching

- Coaching implies the coach is regularly engaged. Just because someone knows the rules of **football** **doesn't mean they do not need regular coaching**. Likewise, just because someone has been trained in the **A3 process** **doesn't mean they do not need regular coaching**.
- If “clear direction with clear ownership” is taking place:
 - The mentee will be engaged on the problem
 - Closer to the problem than you
 - So respect their knowledge
 - Don't use questions to guide them to **YOUR** answer



NEXT WEEK

So on Monday morning....

- Proclamation
 - Make a decision
- Process
 - The A3
- Practice
 - Practice
 - Practice



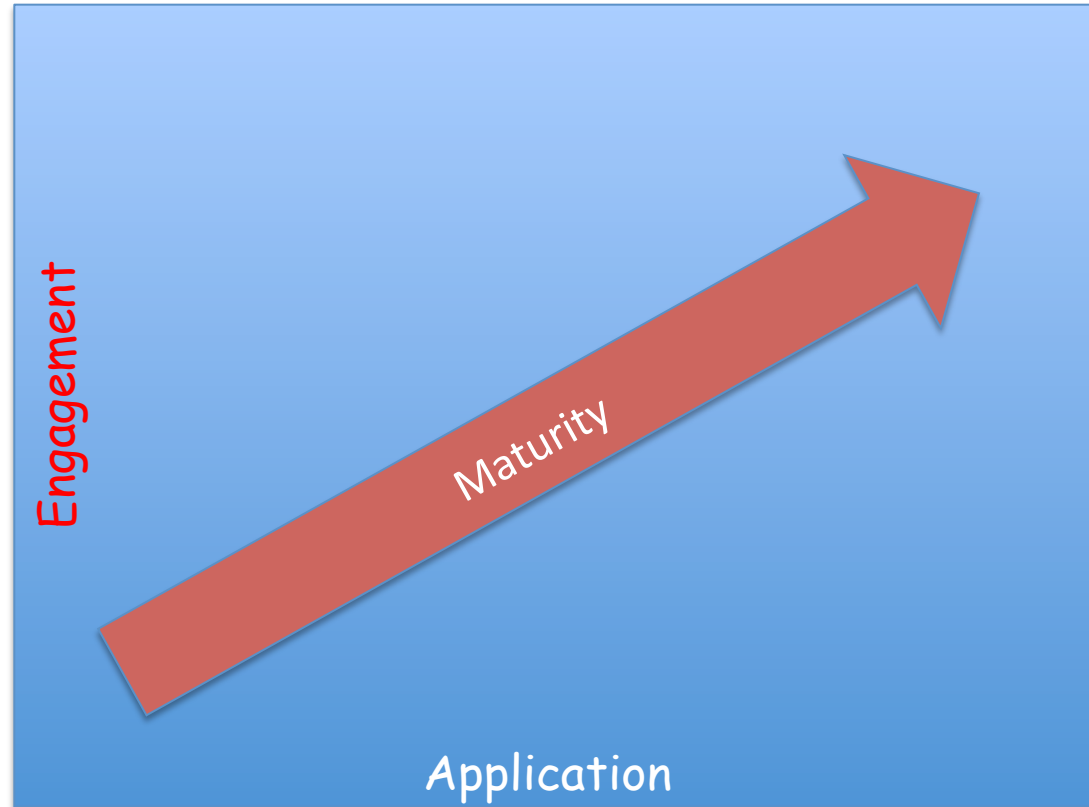
Doing this will help you and your organize move

Con conversationally engage stakeholders (small lot) prior to consensus mtg

Engage stakeholders in meetings (large lot)

Use to report results

Write in solitude



Where is your team?

Did one for training

Do A3s only when asked

Use A3s to accomplish work daily

How I think



QUESTIONS?

Contact: erice@leanshift.com