

Best Practices

key sense identifies kick-off commitment shared business success end stakeholders charter focus Host partners goals write Celebrate Begin

objectives

Develop

Cultivate common Maintain successes

plan establishing team priorities urgency Collaborate

mind Wrap goal

accomplishments

thank alignment day review creates project meeting

clear

10

Manage it Like a Kaizen Event

10 great leadership practices for managing your SPC software deployment

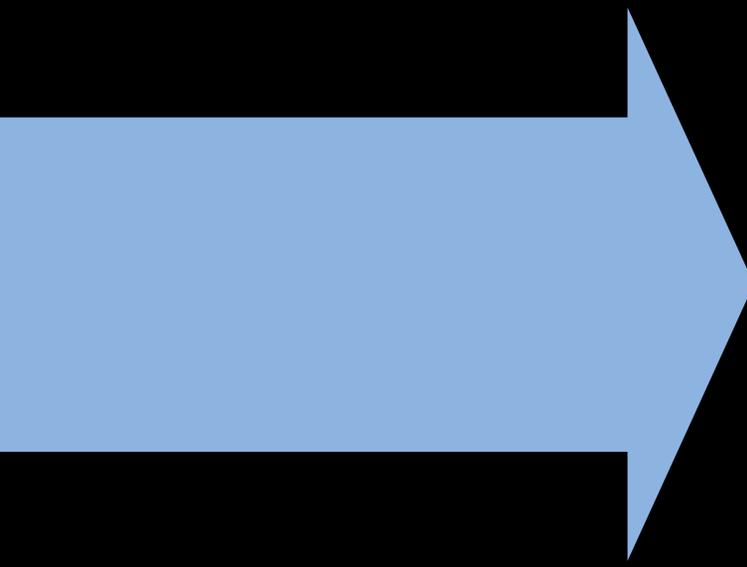


Hertzler Systems Inc.®

Successful leaders manage SPC software deployment like a Kaizen Event, whether they are conscious of it or not

stakeholders focus
Host partners Develop
leadership partners
practices¹⁰ Best
plan creates project

- 1 Begin with the end in mind
- 2 Cultivate a shared commitment
- 3 Collaborate with your business partners
- 4 Develop a charter
- 5 Develop a project plan
- 6 Host a kick-off meeting
- 7 Maintain a sense of urgency and focus
- 8 Wrap up each day with a review
- 9 Establish shared objectives
- 10 Celebrate successes



Best 10 Practices Summary

We regularly witness customers in a wide range of industries achieve incredible success using SPC (Statistical Process Control) software.

Success that includes thousands, sometimes millions of dollars added to their bottom line.

That's just one thing we've observed in the 30-plus years Hertzler Systems Inc. has been in business.

Another is the important part SPC software plays in transforming corporate cultures to becoming data driven.

That's big too.

These successes are not accidental, nor guaranteed. They are the result of nothing less than good planning and execution, and great leadership.

These leaders successfully manage their SPC software deployment like a Kaizen event, whether they are conscious of it or not.

For starters, they know that by pulling people away from their regular jobs in the short time it takes to deploy the system, they are enabling changes that quickly improve their business operations for the long haul.

They take ownership of the deployment and share a set of best practices that create a success-gearred environment.

Employing the ten leadership practices that follow increases the positive impact your SPC software investment has in your organization.

Best Practice 1

Begin with the end in mind

Stephen Covey popularized the phrase “Begin with the end in mind” in his 1989 bestseller *The Seven Habits of Highly Successful People*.

Successful leaders apply this principal during their SPC software deployment when they:

- Have a clear vision of how real-time data will benefit their company, transform their organization’s culture, and empower the people closest to the work to recognize process problems—and what it takes to rectify them.
- Understand the theory of variation in a manufacturing environment.
- Know the cost in materials, morale, time, and reputation in failing to respond to problematic changes in a process.
- Realize that their highly trained and compensated engineers and decision makers make the best use of their time using data to understand their processes and to eliminate any problems these processes have instead of copying, pasting, transforming, and massaging data before they can even use it.

A successful SPC deployment doesn’t stay at a high level.

Successful leaders wade into the details to identify the key metrics each stakeholder needs to do their job.

Once the key metrics are indentified, other considerations include the:

- Format that best suits the needs of each stakeholder. Are dashboards, control charts, yield charts, or other tools the way to go?

- Frequency of date review. What does real-time data mean to your organization? Every five seconds, minute, hour, or another time increment?
- Source of data: a gage, CMM, sensor, database, webpage, text file, keyboard, or other?

Engaging the stakeholders in developing this level of detail goes a long way toward implementing Best Practice 2: Cultivate a shared commitment.

Best Practice 2

Cultivate a shared commitment

When you engage your team of stakeholders in identifying the key metrics they require to drive the business, you are cultivating a shared commitment to success. Consider all the stakeholders in the process.

In a typical SPC software deployment, stakeholders include:

- The IT team, especially database and network administrators
- Manufacturing operations
- Quality and test engineers

The actual list varies depending on your situation. The important thing is to involve everyone. Involve them early. Involve them often.

Great leaders share their vision at every opportunity, and cultivate the expertise of those around them.

Be especially interested in learning from the “naysayers” because it is often the naysayers that have the best interests of the organization at heart.

They may have good reasons for their objections. This takes some discernment,

because sometimes naysayers are a goldmine of insight and wisdom.

Other times, they're just plain dysfunctional in their craving for negative attention.

Don't let the dysfunctional naysayers drag you down and sway you from your focus.

Best Practice 3

Collaborate with business partners

Your business partners, including Hertzler Systems and other key providers, should be part of the group that you're developing for a shared commitment to success.

Include them when implementing your daily plan along with the rest of your team.

Hertzler Systems regularly deploys SPC software at many types of facilities in all kinds of situations. We know what works and what doesn't work, and are here to help guide you to success.

Chances are that we have helped someone in your industry or something close to it.

The bottom line is that our reputation is our most important asset. We're only successful when you're successful. We invite you to align our expertise with yours to help you achieve your vision.

Best Practice 4

Develop a charter

At some point, you will need to put your vision in writing. Develop a charter that identifies goals and key stakeholders.

Best practice for this is preferably a one-page charter that identifies:

- Key business objectives
- Measures of success
- Priorities for execution
- Roles and responsibilities of the key stakeholders in the deployment

This charter helps to ensure that everyone is on the same page. Each stakeholder knows why this effort is important, what they are to accomplish, and what their role is in the effort.

It takes in account input from a wide variety of sources, and is useful for communicating the chain of command in the organization.

Best Practice 5

Develop a project plan

Now you are nearing the project launch.

You've received approval for capital appropriations. You've probably issued purchase orders for relevant software, hardware, training, and services—all designed and scoped in collaboration with your vendors.

You should have a project plan with clear objectives and priorities that provides another level of detail to the documents you used to secure your capital approvals.

Where the earlier documents outlined, for example, the training content, the project plan pinpoints exactly who will be trained on each topic, and at what point.

Realize the long-term value of proper training that is conducted up front. Don't skimp on it.

Your goal is to empower your people to do their jobs, and one most important tools of empowerment is knowledge.

Don't give in to temptation to skip this important tool to long-term success.

Give workers the training they need and enough redundancy in the knowledge base that your team need to:

- Work collaboratively, and
- Cover for each other as responsibilities shift over time.

This detailed project plan also prioritizes implementation services, and makes sure that all the inputs are readied.

For example, if one of the project priorities is to extract data from a coordinate measuring machine, the project plan might:

- Verify that the CMM is connected to the network.
- Identify where log files from the machine are stored.
- Have a printout of typical files.
- Identify the CMM programmer who can answer questions, and
- Identify the programmer's availability to answer questions that might arise during the project.

Developing a detailed plan in collaboration with Hertzler Systems gives us the opportunity to help you see hidden rocks as we enter the white water of deployment.

The first five best practices get us to the actual deployment. If you've laid this foundation, we're ready for the fun and the thrill of white water.

The next five help us manage through the white water.

Best Practice 6

Host a kick off meeting

Host a kick-off meeting with all the stakeholders at the first hour of the first day of the project launch. Invite your core team and invite your boss, plus all the people who will use and engage with the SPC software system.

Go over the vision for the value of real-time data for your business. Make sure everyone understands why this is important.

By now, you should be sick of hearing yourself talk about it, but you're not the audience.

You're managing expectations here, so give enough detail that the entire team knows the priorities and big picture goals for the project launch. Don't give so much information that they go numb – save that for the core team.

Make this the time to tell stories about why the deployment is important, and why business as usual isn't good enough anymore.

In 30 to 45 minutes, dismiss the big group, and focus your attention on drilling into the detailed project plan with your core team. Give them enough detail that they see the forest, but move them into the trees because by now they're ready to get down to work.

Deployments often start with training, and it is good to dive into that as quickly as possible because your core team should be ready to go by now.

Take pulse checks. As you proceed through that first day, take the pulse of your team individually and collectively.

This can be as simple as asking “How’s it going? Is this making sense?” Come back to that periodically every day during the project. Some other good standbys are:

- Are we on track with where we thought we would be by now?
- Do you anticipate any roadblocks ahead?
- Do you need anything from anyone who is not here?
- What do you need from me to be successful?

“Pulse checks” are especially important when you’re called away from the team as will certainly happen. They let people know you care, and give you opportunity to stay in front of problems and clear roadblocks.

Taking pulse of your team regularly means that you must plan absences. Unless this is a very small project, it isn’t realistic that you and others won’t have to tend to other duties during this project.

Make sure the team has what they need to carry forward without you.

And if one of the team members has to leave, make sure you know about it in advance so the rest of the team can plan for it. Few things take the air out of a collaborative than to have key people disappear unexpectedly.

Best Practice 7

Maintain a sense of urgency and focus

It is up to you as a leader to create and manage a sense of urgency and focus for the team.

Continually remind people how important this is, and keep the pressure up to show tangible results at each step of the process.

Without urgency and focus, the entire project can turn into a scope creep fiasco.

Don’t let that happen.

The project will be at the highest risk for scope creep as people begin to catch your enthusiasm and vision. You want them to catch your enthusiasm, but you have to keep a tight rein on the scope.

This is a great place for a Parking List. Dedicate a flip chart page or section of a white board to a parking list.

Anytime someone says, “You know, it would be great if…” say “Great idea. Put it on the Parking List.”

By keeping a Parking List visible, you’ll collect all those great ideas, and you can weigh all of them as the project unfolds without burning time chasing every shiny object.

Best Practice 8

Wrap up each day with a review

As you come to the end of each day, reserve 10 or 15 minutes to gather and quickly debrief.

You can use the same questions you asked during your pulse checks, but these are different because everyone is involved, and you’re reflecting on the progress for the entire day. While you’re debriefing, you’ll naturally be planning the next day. Hold those plans lightly for now.

Watch where the energy is, and where it is lacking.

This is also a good time to review the Parking List you created in Practice 7 to see if there is anything that really must be addressed now. Provide support, encouragement, direction, and correction as needed.

Best Practice 9

Establish shared objectives

When you come in the next day, pull the team together and hold a very brief kick-off meeting.

Overnight, you and other team members may have some new clarity about direction so it is useful to reset these every morning, not the night before.

Jot clear objectives down on a whiteboard or flipchart. It is important that they be visible so the team can come back to them as they work through the day.

Best Practice 10

Celebrate successes

Throughout this process, the more honest and direct you are with the team, the better.

A good motto for feedback is “Give criticism privately. Celebrate success publicly.”

Without being a Polly Anna, look for every opportunity to celebrate success.

They’re working hard. Let them know that you see it and appreciate it.

Hertzler Systems Inc.

has been a leader in Statistical Process Control, SPC software, and Six Sigma for over 30 years. We serve a diverse customer base in service, transactional, and manufacturing environments.

Hertzler's software and services enable clients to connect, collect, and analyze data, building a data infrastructure for making data-driven decisions. These capabilities help clients to reduce costs, cycle time and errors, and increase profitability. These are our core competencies.



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