



CQI Learning Lunch

Overcoming Roadblocks and Curves in the Road to Success

**Host - Dennis Sergent
517-381-5330**

**June 8th, 2011
10:30 AM to 1:00 PM**

***University Club of Michigan State
3435 Forest Road, Lansing, MI 48909
517-353-5111***



What Can We Do To Be Successful?

- **Critical Success Factors**
 - Personal effectiveness before organizational effectiveness
 - Open communications and dialogue
 - Conflict resolution models
 - Consensus driven decision making
 - Double Loop learning system
 - Leadership support - demonstration of their engagement
 - Everyone is engaged in change, quality and success
- **Be comfortable with;**
 - **Learning & PDSA Cycles**
 - Productive reasoning
 - System of Profound Knowledge
 - Use simple tools & processes
 - **Managing by Fact**
 - Data drives decisions
 - **Value to Customer, Team and Owners**
 - Cooperative processes
 - Management support
 - Involvement by all employees
 - Customer perception of value
 - **Commitment to Quality & Trust**
 - Time and resources
 - Action consistent with words
 - Drive out fear, build in trust



Basic Principles of Personal Effectiveness

Focus On the Situation, Issue or Behavior, Not on the Personalities.

Maintain Constructive Communications and Relationships.

Take Initiative to Act and Make Better Results.

Lead by Personal Example.

Keep Focus On the Purpose, Give Every Issue Time, In Time and On Time.



Elements of Personal Effectiveness

DECIDE

- Be clear, specific and positive about what you want.

BE HONEST

- Tell the truth, first to yourself and then to others.

EXPRESS YOURSELF

- Know your unique contribution and make it.

TAKE RISKS

- Break through your limitations and operate without guarantees.

PARTICIPATE 100%

- Be totally involved.

BE RESPONSIBLE

- Take ownership for results and be able to respond through choices.

CREATE PARTNERSHIP

- Work in a context of mutual benefit.

COMMIT

- Do what it takes.

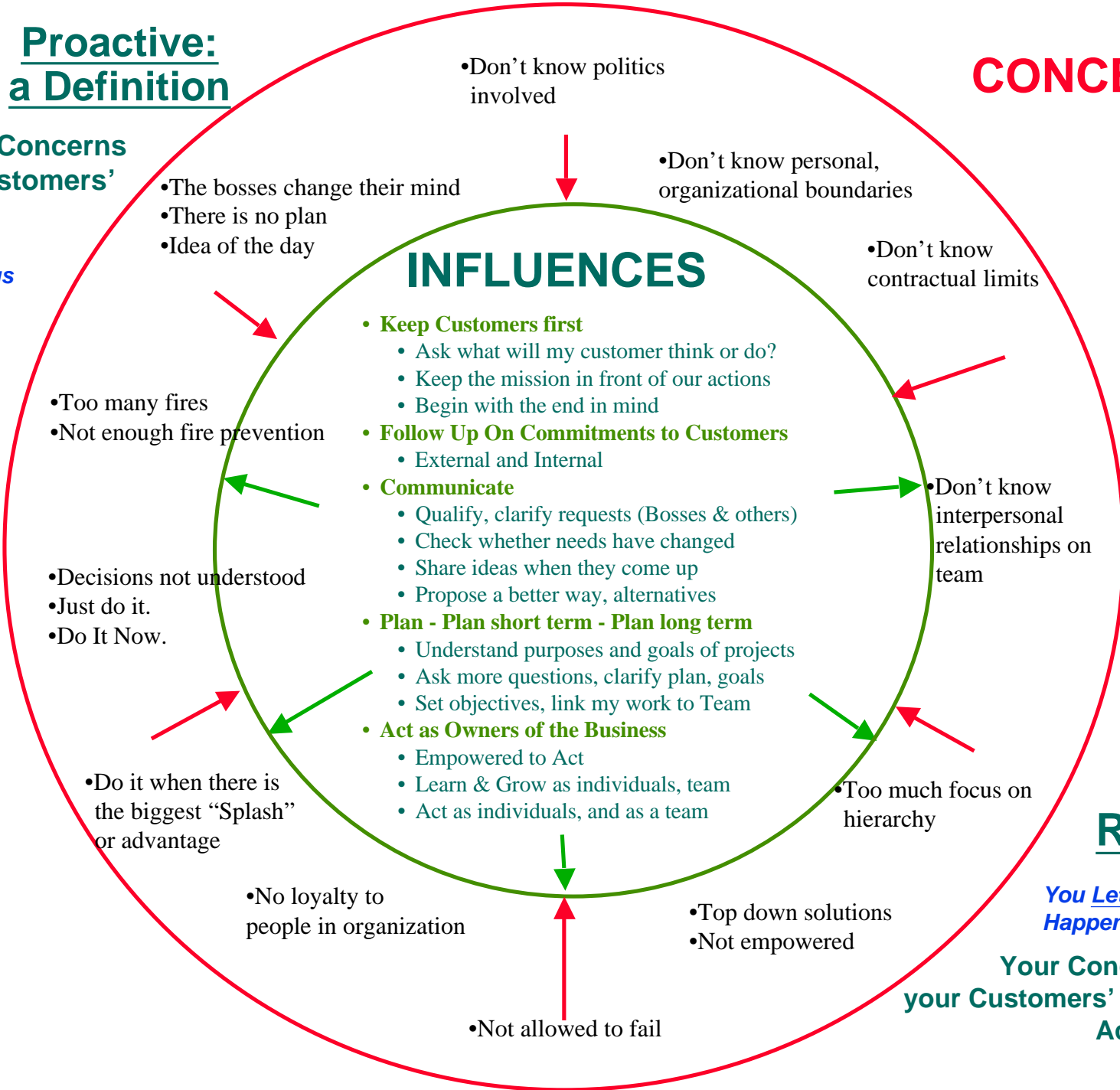


Proactive: a Definition

Act on your Concerns
and your Customers'
Concerns

You Make Things
Happen

CONCERNS





Communications - 10 Commandments

MEMOS

- Organize Your Thoughts.
- Be Conversational.
- Eliminate Jargon and Buzzwords.
- Tighten and Simplify.
- Use the Active Voice.
- Tailor Your Message To The Audience.
- Don't Be Afraid of Reference Help.
- Emphasize Key Points.
- Get A Second Opinion.
- Check Carefully Before Sending.

PRESENTATIONS

- Respect Your Audience.
- Keep Your Slides To A Minimum.
- Tell Them How You Feel.
- Know What Time It Is - At All Times.
- Learn From The Masters.
- Do Not Read or Memorize Word-For-Word.
- Do Not Groom Or Flirt, But Present.
- Give Credit Where Credit is Due.
- Have A Positive Message.
- Tell Your Own Story.

ALL WRITING (Strunk & White)

- Choose a suitable structure and stick to it.
- Make the paragraph the basic unit of each thought.
- Use the active voice.
- Put statements in positive form; don't use double negatives.
- Use definite, specific, concrete language.
- Omit needless words.
- Avoid a succession of sentences joined with the conjunction "and".
- Express similar ideas in parallel form.
- In sentences, keep the subject and verb together.
- Pick one verb tense and stick with it.
- Place important words of a sentence at the end.



Debate vs. Dialogue Models

DEBATE MODEL

Information Processing Context

OLD FRAMEWORK

- 1. Argument**
- 2. Logic - Affirmative / Negative**
- 3. Evidence**
- 4. Impact**

HOW LEARNING IS DIFFERENT

Banking Model* of Learning
 Reading At Speed to Memorize
 Repeating Back At Rote, Incomprehensible
 Speeds
 Quote Expert Ideas & Authors
 Overwhelm "Opponents" with Preponderance of
 Evidence
 Contradict Opponents
 Win / Lose Proposition

DIALOGUE MODEL

Active Learning Context

NEW FRAMEWORK

- 1. Identity**
- 2. Purpose**
- 3. Method**
- 4. Adaptation**

HOW LEARNING IS DIFFERENT

Pursue Active Learning
 Challenge Thinking in Ideas
 Pose Questions In Dialogue
 Define Adaptation We Must Make
 Win / Win Proposition

* Banking Method as described by Paolo Friere and HBO
 Documentary "Resolved" about the innovative approach of a coach
 and two students in the debate competitions of 2006 and 2007.

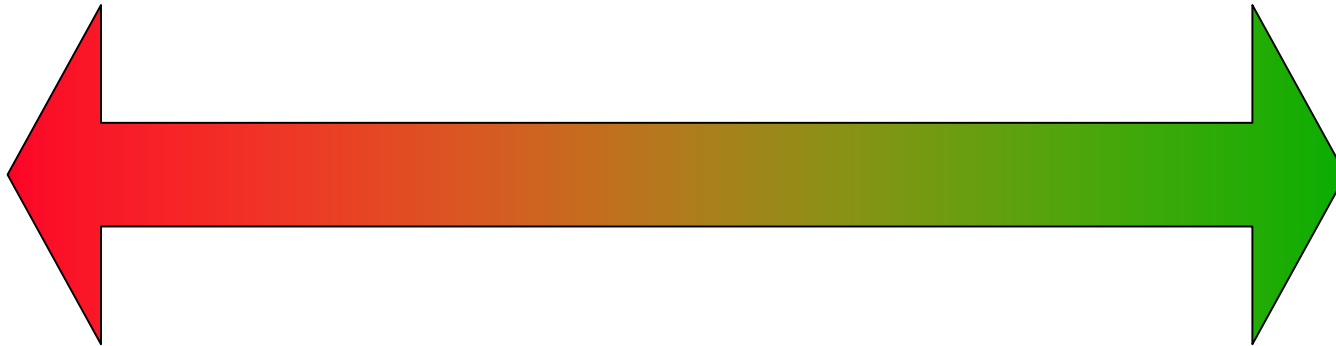
Conflict vs. Synergy

Conflict

- Impaired performance
- Misalignment
- Focus on internal issues

Synergy

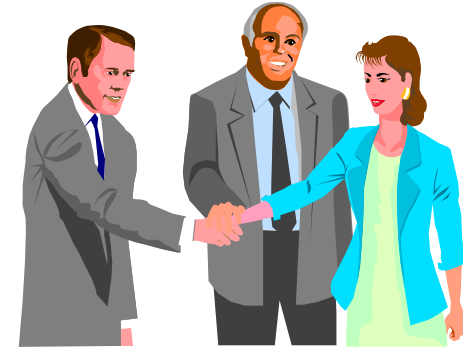
- High performance
- Alignment
- Focus on the result and the customer



Conflict Resolution Principles and Process

Principles:

- 1 Always wear a TEAM hat.
- 2 Base the resolution on facts.
- 3 Resolve conflicts in the shortest possible cycle time.
- 4 Keep conflict invisible to the customer.
- 5 Resolve to support the TEAM strategy.
- 6 Maximize shareholder value.
- 7 Resolve conflict at the level closest to the issue, by the people empowered.
- 8 Preserve and enhance brand equity.
- 9 Don't let there be any surprises.



Process:

- 1 Determine impact on and involve the other business units. (Originator)
- 2 Identify and notify the originating entity of inter-unit conflict. (Everyone)
- 3 Determine impact on shareholder value and share with involved parties.
- 4 Set a timetable to resolve the conflict.
- 5 Escalate your resolution failures.
- 6 Involve only those who have the authority to decide.
- 7 Ensure feedback and coaching occurs for those who escalate.
- 8 Create institutional memory for the organization.



Problem Solving Approaches & Principles

Breakthrough Approaches:

- A. **Do-Nothing**
- B. **The Chance Approach** focuses on the importance of the accidental in problem solving.
- C. **Affective Approaches** stress intuition, insight, feelings, and divergent thinking.
- D. **Rational Approaches** characterized by structured, systematic, methodical, scientific processes.
- E. **Breakthrough Thinking** synthesizes the previous three approaches to provide an entirely new way to think.

Breakthrough Principles:

1. **Uniqueness:** Whatever the apparent similarities, each problem is unique and requires an approach that dwells on its own contextual needs.
2. **Purposes:** Focusing on purposes helps strip away nonessential aspects to avoid working on the wrong problem.
3. **Solution-After-Next:** Innovation can be stimulated and solutions made more effective by working backward from an ideal target solution.
4. **Systems:** Every problem is part of a larger system. Understanding the elements and dimensions of a system matrix lets you determine in advance the complexities you must incorporate in the implementation of the solution.
5. **The Limited Information Collection Principle:** Knowing too much about a problem initially can prevent you from seeing some excellent alternative solutions.
6. **The People Design Principle:** The people who will carry out and use a solution must work together in developing the solution with Breakthrough Thinking. The proposed solution should include only the minimal, critical details, so that the users of the solution can have some flexibility in applying it.
7. **The Betterment Timeline Principle:** A sequence of purpose-directed solutions is a bridge to a better future.



Consensus - An Operating Definition

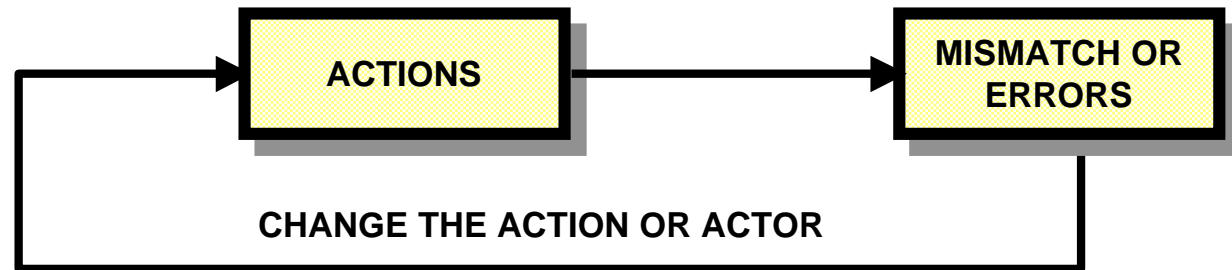
Consensus is a general agreement among all team members who support the same decision.

It means all team members can and will support the decision without compromising important values of the team or members.

Consensus does not mean the decision is perfect or that everyone agrees to the same extent, it only means we have found a definition of unity which we can move forward with until we can improve it at a later date.

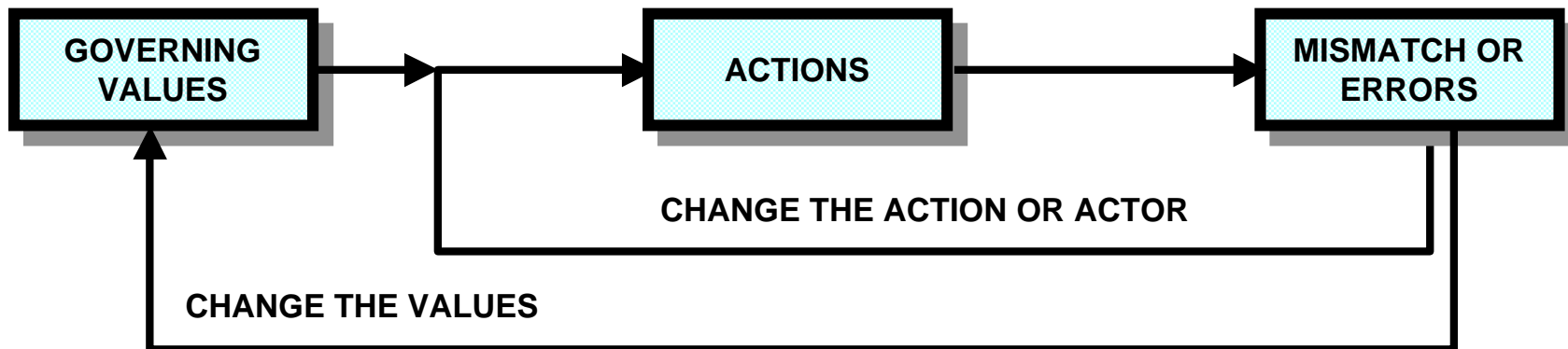
Single Loop Learning - Double Loop Learning

SINGLE-LOOP LEARNING



Invalid or Incomplete Information - Ineffective Roles & Policies, Designed Errors = *Fix Blame*

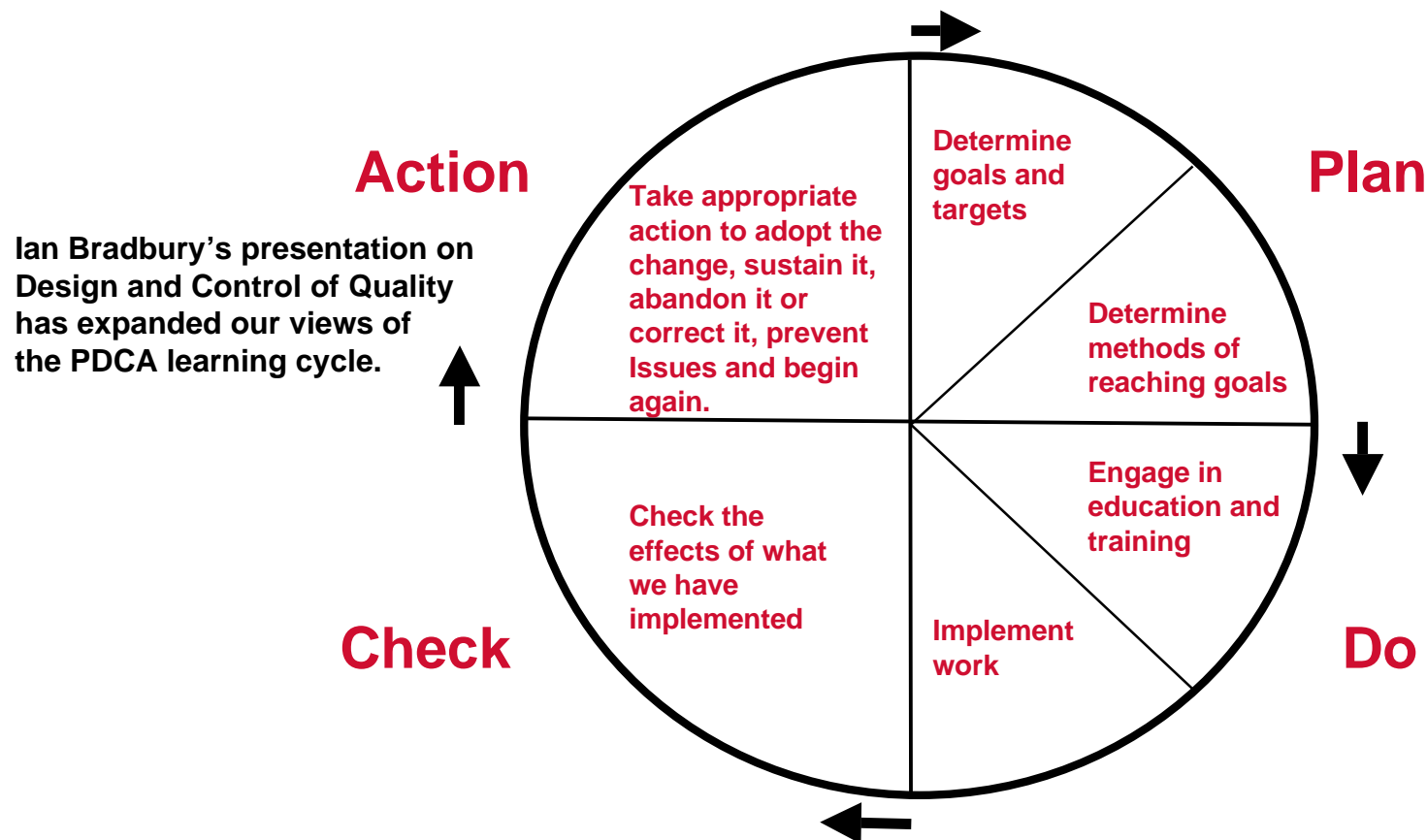
DOUBLE-LOOP LEARNING



Valid Information - informed Choices - Monitored Implementation = *Fix System*

P-D-C-A - Proceed With Control

- We **PLAN** what we want to accomplish over a period of time and what we will do to get there.
- We **DO** something that furthers the strategies and goals developed in our plan.



We **CHECK (Study)** the results of our actions to make sure we achieve what we plan.

We **ACT** by developing procedures to ensure our plans continue to be successful and by changing what is needed to achieve the initial goals.



Leadership

Definition:

- The process of accomplishing important objectives by enlisting other people and their talents to work toward a common goal.

Traits:

- **INTEGRITY & DEPENDABILITY**
- **CURIOSITY & COURAGE**
- **DECISIVE & INITIATIVE**
- **ENTHUSIASM & ENDURANCE**
- **Other Traits And Roles**
 - **Knowledge** **Teacher**
 - **Loyalty** **Mentor**
 - **Common Sense** **Organizer**
 - **Justice** **Legislator/Judge**
 - **Tact** **Communicator**
 - **Unselfish** **Facilitator**
 - **Department** **Role Model**
 - **Trustworthy** **Delegator**



Deming's 14 Points For Management

Key to understanding 14 Points is variation.

The more variation - the more waste, Deming's 14 points paraphrased here:

Create constancy of purpose towards improvement.

- Replace short-term reaction with long-term planning.

Adopt the new philosophy.

- Management should walk the talk.

Cease dependence on inspection.

- Reduced variation eliminates need to inspect for defects.

Move towards a single supplier for any one item.

- Multiple suppliers mean variation between feedstocks.

Improve constantly and forever.

- Constantly strive to reduce variation.

Institute training on the job.

- Adequately trained staff will all work the same way, and reduce variation.

Institute leadership.

- Mere supervision is quota- and target-based

Drive out fear.

- Long term, it prevents workers from acting in the organization's best interests.

Break down barriers between departments.

- Use the 'internal customer', that each department serves other departments that use its output.

Eliminate slogans.

- It's not people who make most mistakes - it's the process they are working within.

Eliminate management by objectives".

- Deming saw production targets as encouraging the delivery of poor-quality goods.

Remove barriers to pride of workmanship.

- Many of the other problems outlined reduce worker satisfaction.

Institute education and self-improvement.

- Harassing the workforce without improving the processes they use is counter-productive.

The transformation is everyone's job.

- "You do not have to do this. Survival is not compulsory."

Deming's System of Profound Knowledge (SoPK)

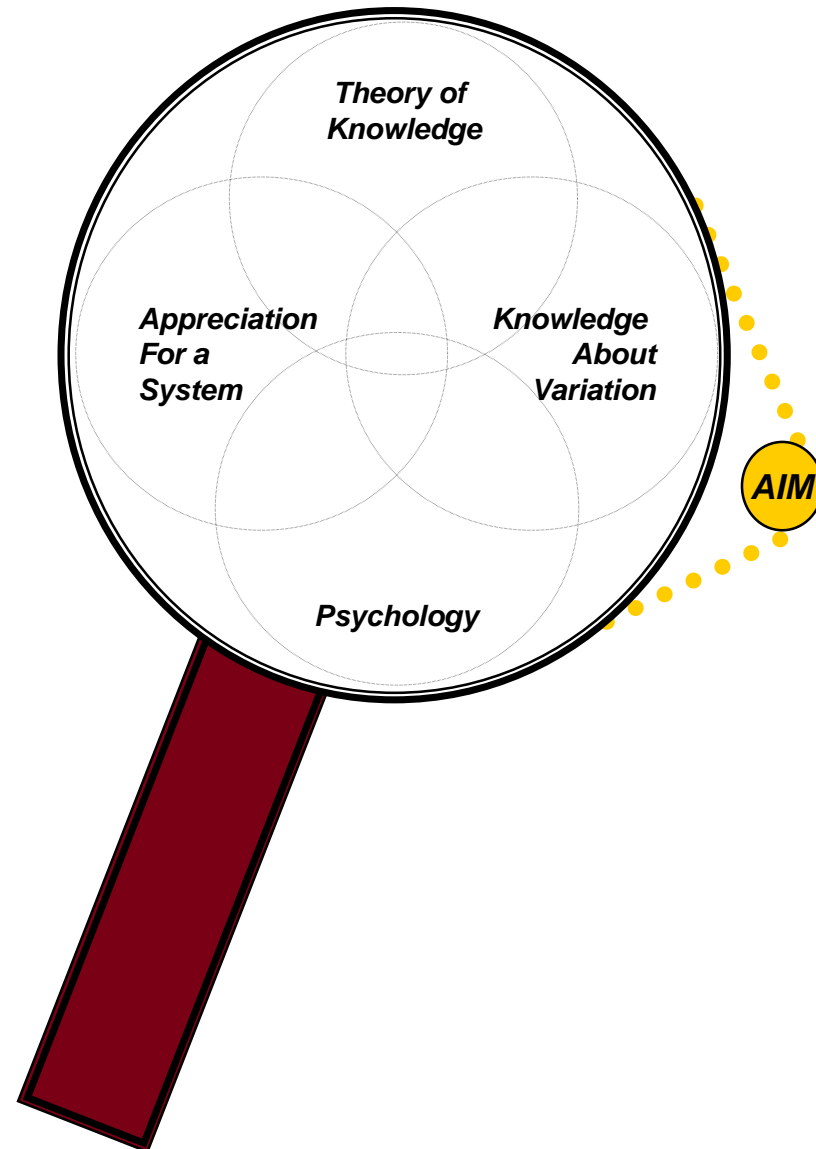
“The aim . . . is to provide an outside view - a lens . . . provides a map of theory by which to understand the organizations that we work in”

Components of The Whole

- **Theory of Knowledge**
 - Knowledge is built on theory
- **Appreciation for a System**
 - A system is a network of interdependent components that work together to accomplish the aim of the system
- **Knowledge About Variation**
 - There will always be variation.....
- **Psychology**
 - Individuals
 - Groups
 - Society
 - Change

“One need not be eminent in any part of profound knowledge in order to understand and to apply it”

“The various segments of the system . . . Cannot be separated. They interact with each other. For example knowledge about psychology is incomplete without knowledge of variation.”

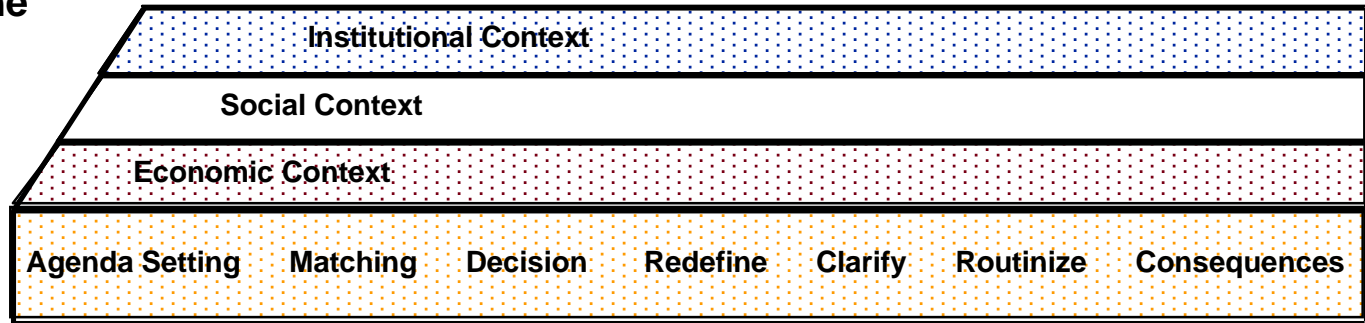


Diffusion of Innovations

Metacompetence in the Diffusion Process

(Diffusion Parameters)

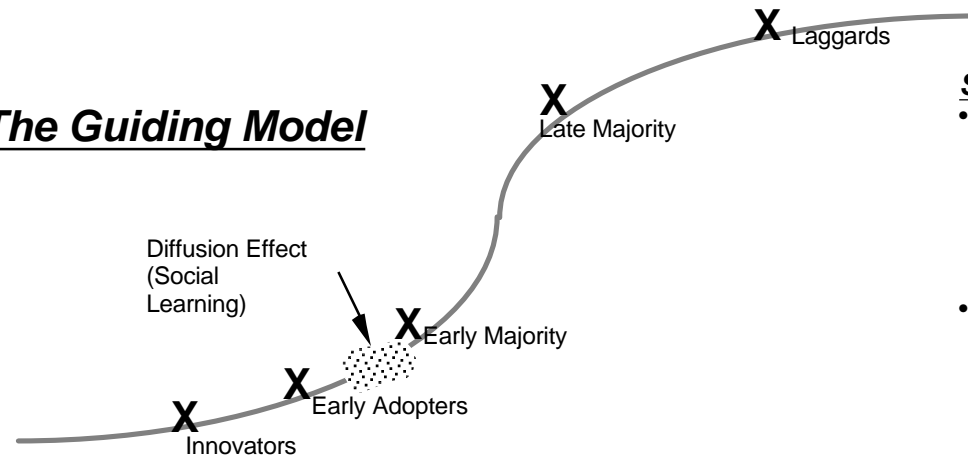
Context: Organizations



[Diffusion Process]

The Guiding Model

Primary Reference:
"Diffusion of Innovations"
The Free Press,
By Everett M. Rogers, 1983



SYSTEM:

- **Structural Characteristics**
 - centralization
 - formalization
 - complexity
 - size
 - organizational slack
- **Implementation Complexity**

Individual Competence

Knowledge	Persuasion	Decision	Implementation	Confirmation	Consequences
[Change Agent Effort - - (#1-6) - - - - -]			[CA effort - - (#7,8) - - - - -]		
		[- - Create and/or Reduce Dissonance - -]			[- - - Reinforce Consonance - - -]



Relative Advantage; Complexity;
 Compatibility; Trialability; Observability

(Transferability)
 (Communicability)



I Am Your Customer

I am your customer. Satisfy my wants, add personal attention and a friendly touch, and I will become a walking advertisement for your products and services. Ignore my wants, show carelessness, inattention and poor manners, and I will simply cease to exist as far as you are concerned.

I am sophisticated -- much more so than I was a few years ago. My needs are more complex. I have grown accustomed to better things. I have money to spend. My ego needs the nourishment of a friendly, personal greeting from you. It is important to me that you appreciate my business. After all, when I buy your products and services, my money is feeding you.

I am a perfectionist. I want the best I can get for the money I spend. When I am dissatisfied, then take heed. The source of my discontent lies in something you, or the products you sell, have failed to do. Find that source and eliminate it, or you will lose my business and that of my friends as well; for when I criticize your products or services, I will talk to anyone who will listen.

I am fickle. Other businesses continually beckon to me with offers of “more for my money.” To keep my business, you must offer something better than they. I am your customer now, but you must prove to me again and again that I have made a wise choice in selecting you and your products and services above all others.



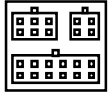
Effective Meetings

Let's make sure we add value whenever we meet with others to tackle complex issues which challenge the organization and the people in it.

These steps ensure maximum value from everyone's time:

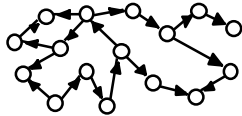
1. **Invite only those who are needed to contribute to the agenda.**
 - **The People Closest To The Issues With the Highest Level of Accountability & Support**
 - **They Must Speak For Their Organization and Stakeholders**
2. **Create a simple PAL (Purpose - Agenda - Limits) to focus on.**
 - **One Page Is Enough, Keep Time Balanced w/Enough Time, But No Time to Waste**
3. **Describe the logical, specific subjects to support the purpose and agenda.**
 - **Give Team Members A Chance to Create The Agenda and Then Support It**
4. **Schedule meeting, communicate PAL as soon as possible before the meeting.**
 - **Give People Time To Prepare To Share Their Ideas and Thoughts**
5. **Communicate the PAL at the beginning of the meeting.**
 - **Review With GRIP - Goals, Roles, Interpersonal and Process Consensus**
6. **Explain all your roles - as facilitator and participants.**
 - **Facilitator Sets The Example, Everyone Follows**
7. **Discuss and listen to each other.**
 - **Dialogue Is The Rule, Debate is Not, and Interpersonal Conflicts Get Sent Out As Issues**
8. **Identify actions to take first and when they need to be done.**
 - **Define Actions by Originator, Owner, Helpers, Start Dates, Complete Dates, and Dependencies**
9. **Identify who will take ownership and who will help.**
 - **Each Action Has One Owner (Leader) and At Least One Team Helper**
10. **Summarize actions, ownership and when we meet again to review progress.**
 - **Schedule Next Meeting and then Send Out Action Item Update Within 24 Hours**
 - **If Minutes Must Be Made, Make Them Action Oriented, Not "He Said, She Said"**

Management & Planning Tools



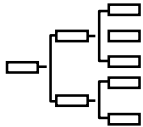
Affinity Diagram

- Creative Process to Group Ideas, Issues, Opinions by Natural Relationships



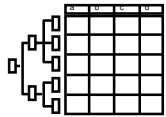
Interrelationship Digraph (ID)

- Graphic, Logical Display of Interrelated Factors involved with Complex, Multiple Variant Problems or Outcomes



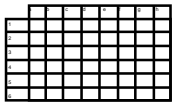
Tree Diagram

- Systematic Map of Primary Goals, Subgoals, Tasks and Paths to Achieve Objectives



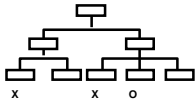
Prioritization Matrixes

- Tasks, Issues or Possible Actions Prioritized by Known, Weighted Criteria, which Narrows Down Options to the Most Desired or Effective.



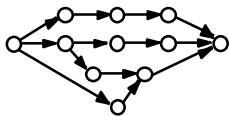
Matrix Diagram

- Shows Connection or Correlation Between Each Idea/Issue in One Grouping of Items with Another Grouping.



Process Decision Program Chart (PDPC)

- Map of Every Conceivable Event and Contingency when Moving From a Problem Statement to the Possible Solutions



Activity Network Diagram

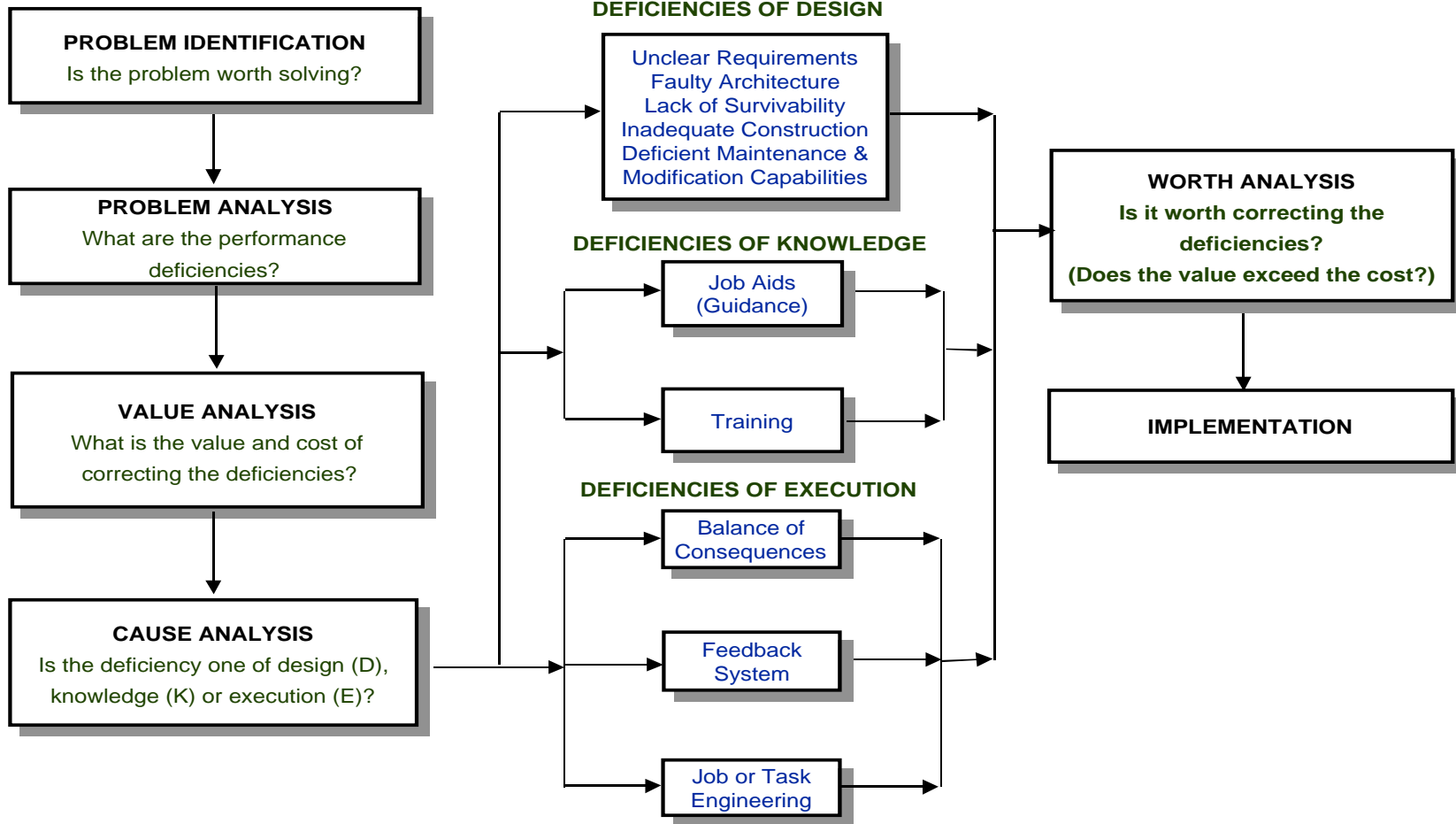
- Similar to a PERT or CPM chart; a Plan for a Complex Task and Related Subtasks.

Performance Analysis Process

Used to analyze all manner of performance issues and then decide both the value and cost of correcting deficiencies.

Performance Audit

Steps in the Performance Audit





Simplicity Checklist

Make simplification a goal, not a virtue

- **Include simplicity as a theme of the organization's strategy**
- **Set specific targets for reducing complexity**
- **Create performance incentives that reward simplicity**

Simplify organizational structure

- **Reduce levels and layers**
- **Increase spans of control**
- **Consolidate similar functions**

Prune and simplify products and services

- **Employ product portfolio strategy**
- **Eliminate, phase out or sell low-value products**
- **Counter feature creep**

Discipline business and governance processes

- **Create well defined decision structures**
 - **Boards, councils, committees**
- **Streamline operating processes**
 - **Planning, budgeting, marketings, selling, servicing, manufacturing, etc.**
- **Involve employees at the grassroots level**

Simplify personal patterns

- **Counter communications overload**
 - **E-Mails, phone calls, texting, Instant Messaging, Memos, PowerPoints**
- **Manage meeting time**
- **Facilitate collaboration across organizational boundaries**

Simplicity-Minded Management -
A practical guide to stripping complexity out of your organization.

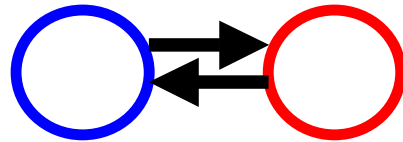
By Ron Ashkenas,

Harvard Business Review

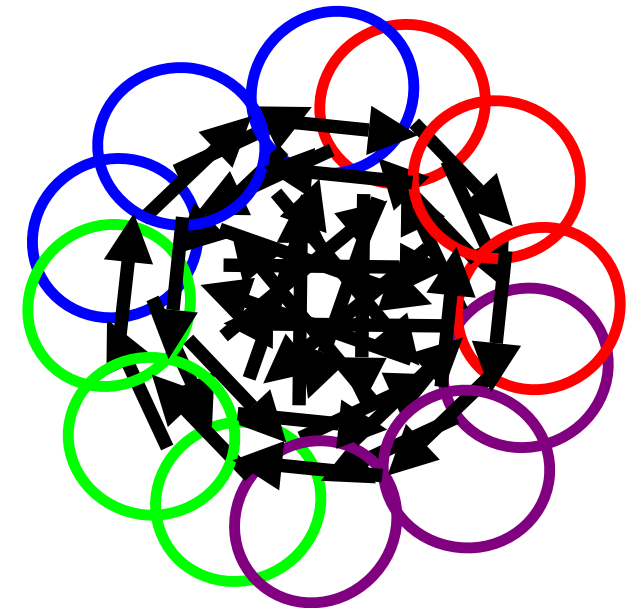
Relationships - The Power In Any Team

The **Power** of a Team is the sum of the **Trusting Relationships** between its members

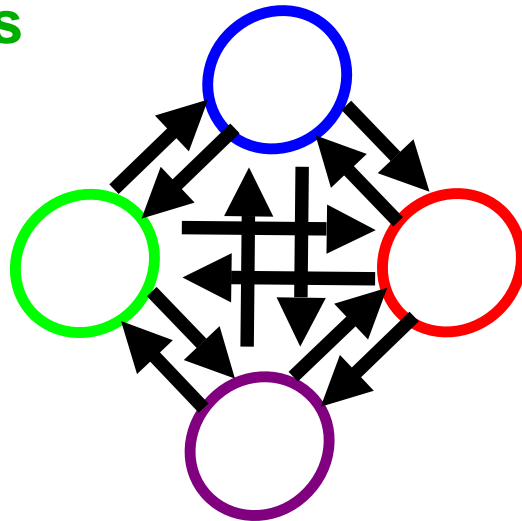
2 people = 2 relationships



12 people = 132 relationships



8 people = 56 relationships





Lunch!

- **Let's collect our lunch!**
- **Room will be secure**
- **Staff will take your drink orders**
- **While you dine, discuss this**
- **Make sure everyone is heard from**
- **Be prepared to share your answers to the following questions!**

TABLE DISCUSSIONS

AT EACH TABLE DISCUSS:

- **WHAT ARE OUR NEXT ACTION STEPS?**
 - **What did I learn here?**
 - **What do we need to discuss next?**
 - **Who else should be here?**
 - **What will we do with this learning?**
 - **When do we meet again?**

Future Agenda

Future Discussions = 3 Weeks + 1 Weekday

- June 30th, 2011 = Innovation and the Alternatives
 - July 22nd, 2011 =
 - August 15th, 2011 =
 - September 6th, 2011 =
 - September 28th, 2011 =
 - October 20th, 2011 =
 - November 21st, 2011 =
 - December 8th, 2011 =
-
- What Are Your Ideas?



Other Subject & Speaker Suggestions

- Benchmarking
- Brainstorming
- Civility - Lack of it Costs up to \$300 Billion Annually (Pattie McNeil)
- Comparisons of Quality Management Systems
- Continuous Improvement
- **Design & Control of Quality** (Ian Bradbury of Peaker Services, Inc.)
- **Effective Measurement for Training & Development Initiatives**
- **Gipsie Ranney**
- Having Difficult Conversations - Principles and Tools
- How to Plan the Perfect Meeting
- Influence (Influencing Your Leader and Your Team)
- InThinking, Investment Thinking, Thinking Roadmap
- **Lean Project: Eliminating the Waste In Performance Reviews** (R. Steele of Peaker Services)
- **Mentoring & Partnership Between Generations** (Baby Boomer, GenX, GenY, Transition to Future)
- **Quality Assurance Through Proofing**
- Six Sigma
- Training vs Learning - What Makes The Difference in Performance?

- **What Are Your Ideas?**

Sponsoring Organizations





**SERGEANT
RESULTS
GROUP**

CQI LEARNING LUNCH

***Overcoming Roadblocks and
Curves in the Road to Success***

