

PRACTICAL TOOLS TO ENGAGE YOUR COLLEAGUES

Agenda

Topics:

- Gemba Walk
- The Fix-It Board and the Task Board
- Stand Up Meetings

Breakdown:

- The Situation
- The Solution
- The Results

THE GEMBA WALK

The Situation

- Staff were disengaged
- People working on the same task in different ways
- Silos within the department and between different units
- Evident divide between management and all other staff
- Client satisfaction an unknown



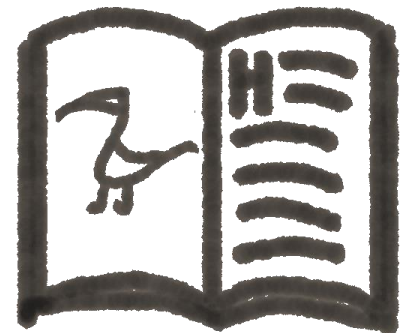
Motivation

- Build a bridge between management and staff
- Increase trust and understanding
- Share knowledge
- Attain mutual respect
- Open, honest, and respectful dialogues

The Solution

Gemba Walk:

- A practical tool used to observe work directly where it take place
- Highlights efficiencies and deficiencies within work processes
- Helps build teams
- Increases staff engagement
- Diversify decision-making procedures
- Celebrate successes where they occur



How Does a Gemba Walk Work?

Step 1: Walk the 'Document'

- During your daily Gemba Walk, follow the path one of your documents takes.

Step 2: Talk to People, and Effectively Listen

- Be open-minded, non-judgmental, and respectful
- Ask how the day is going
- Are there any challenges?
- Is there anything I can help you with?

Step 3: Make the Following Observations

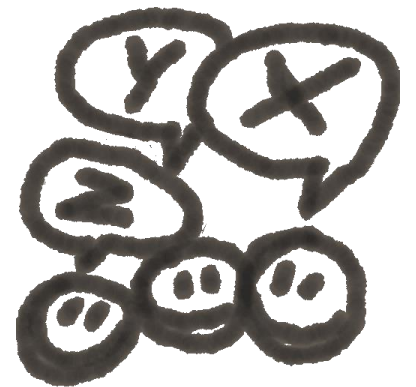
- Are there documented standard practices?
- Are people following best practices?
- Are people working together on tasks?
- How's the work atmosphere, pleasant, hostile, calm?

Step 4: Record your Observations and Make Them Known



Group Gemba Walk

- Gemba Walks can also incorporate clients, both external and internal, as well as a wide assortment of team members
- When taking part in a team-based Gemba Walk try to limit the number of people participating to 4
- Clients who take part in the Gemba Walk can benefit from a better understanding of your workflow
- Offers multiple perspectives on how work is being performed
- Staff often feel empowered while taking part in a shared Gemba Walk, and it allows them to diversify their daily work.



The Results

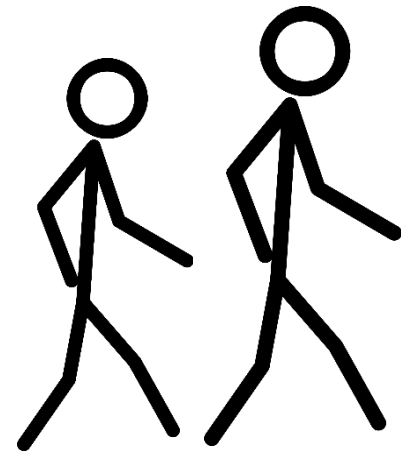
- Boost in staff morale and engagement
- Shared understanding of work processes and knowledge transfer between all units of the department
- Discover inconsistencies and best practice
- Evolved Gemba Walks to incorporate units located in other buildings to break down physical barriers that fostered siloes
- Huge increase in teamwork and team-based approaches to problem-solving
- Client satisfaction dramatically increased



WHO FEELS LIKE GOING FOR A WALK?

...WAIT!!

*BEFORE YOU GO FOR YOUR GEMBA WALK,
THE FOLLOWING TOOLS MIGHT BECOME HANDY,
WHILE WALKING!!*



THE FIX-IT BOARD AND THE TASK BOARD

The Situation

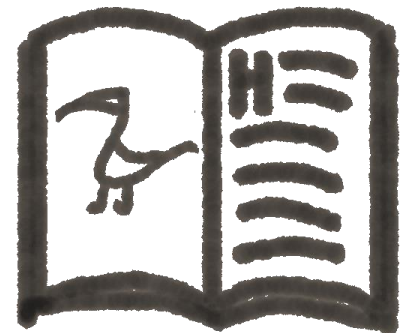
- Silos within the unit between 2 different work groups
- Processes that needed a little bit of “love”
- No time for intense collaboration
- Management working to find ways to improve work flow and assigning all the special projects work to team members



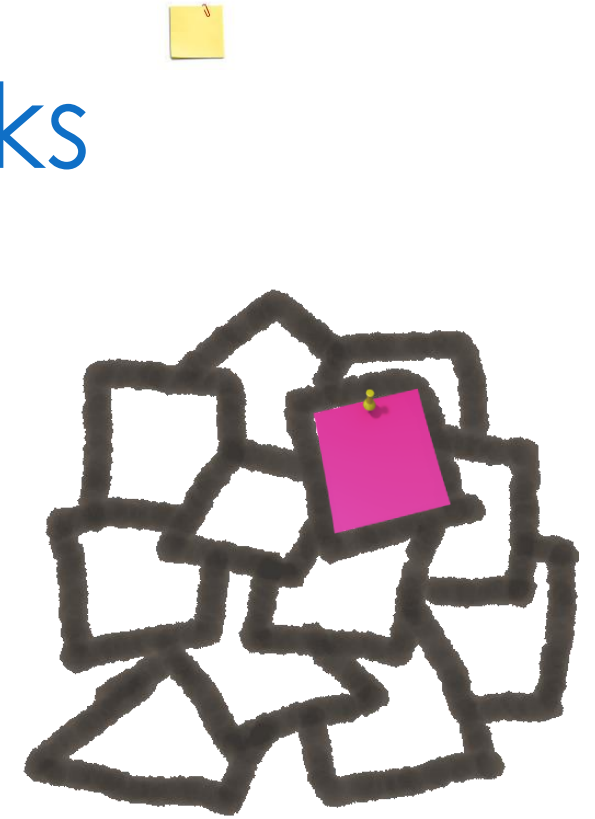
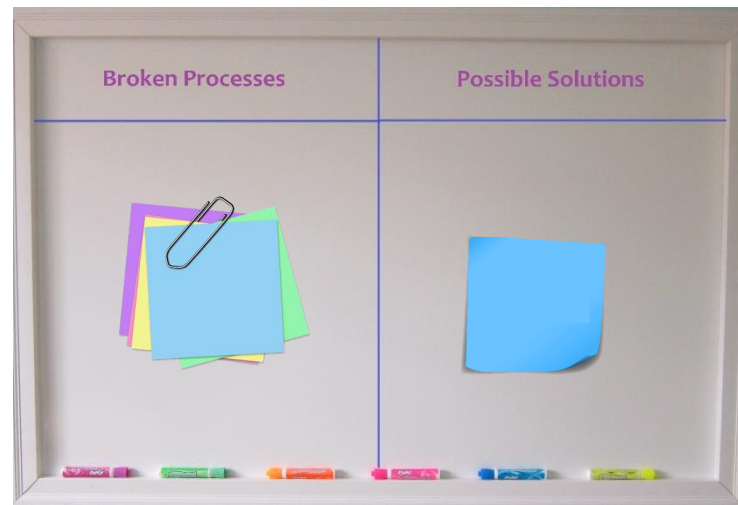
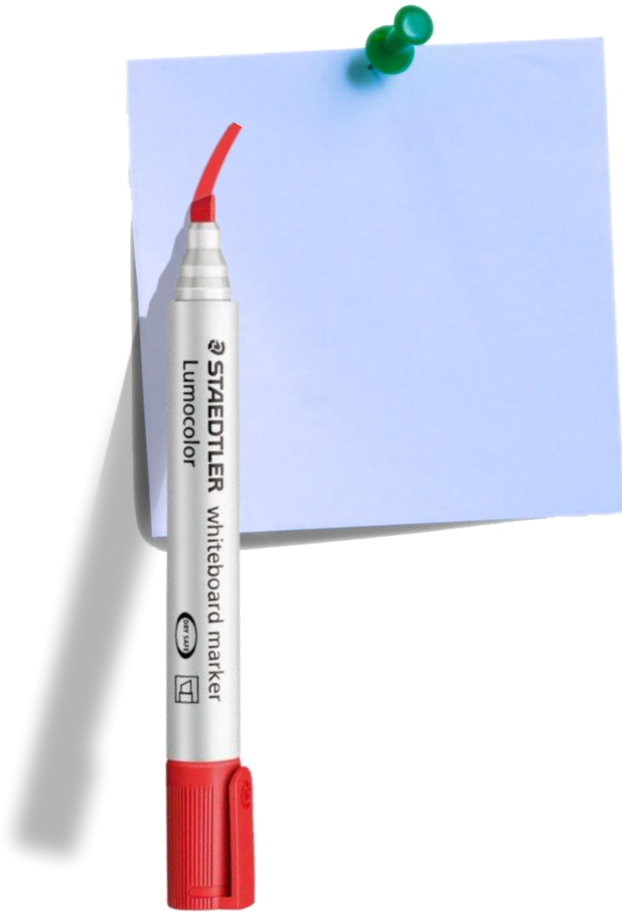
The Solution

Fix-it Board and Task Board

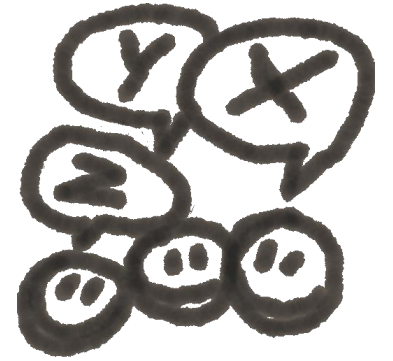
- Tools built to allow collaboration from the unit members
- Requires very little time
- Help Identify flaws in the work processes (FIX-IT BOARD)
- Allow self-generated tasks and self-assignment (TASK BOARD)
- Empowers staff
- Creates a team




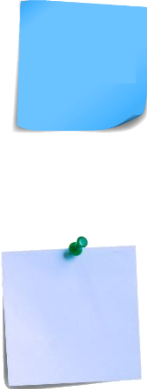


How Does a FIX-IT Board works



How Does a Task Board works



To DO	In Progress	Done	Follow-up
			

Suggested Fields

- To Do
- In Progress
- Done
- Follow-up

The Results

- Identifies issues that needs to be looked at...
- Increases team work...and collaboration
- Give the team member the power to improve the way they do the work
- It also helps to ease the improvement process by removing the...
“we don't have time to fix everything”
- It provides visual representation of the work load and triggers discussion...



STAND UP MEETINGS

It's not a meeting, it's teamwork.

The Situation

- Small team in Finance, more work than we could handle
- We were stressed!
- We were reactive, not proactive
- Team didn't feel informed
- 1 hour weekly meetings with each staff member wasn't worth it
 - 3 staff X 1 hour = 3 hours + 3 hours of my time = 6 hours
- I didn't see any value in having "team meetings" (BTW - I was wrong)

Solution: Stand Up Meeting

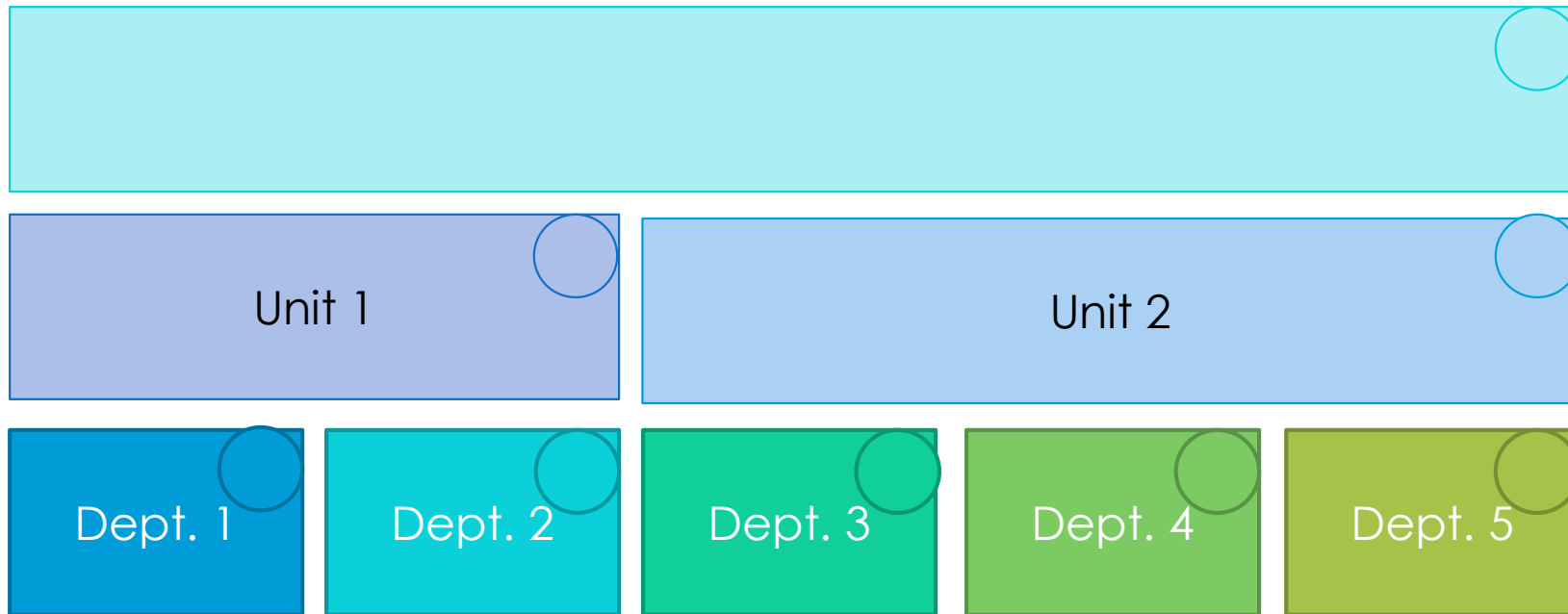
- 15 minutes @ 10:30AM every Monday (or Tuesday)
- Each participant:
 - What did you do since the last meeting?
 - What will you do by the next meeting?
 - What obstacles are you facing?
- Participants have 2-5 minutes each
- Participants stand – to keep the meeting short
- Prolonged discussion is not welcome: “Take it offline.”
- Tip: List meetings as tasks.



More about “Stand Up” meetings

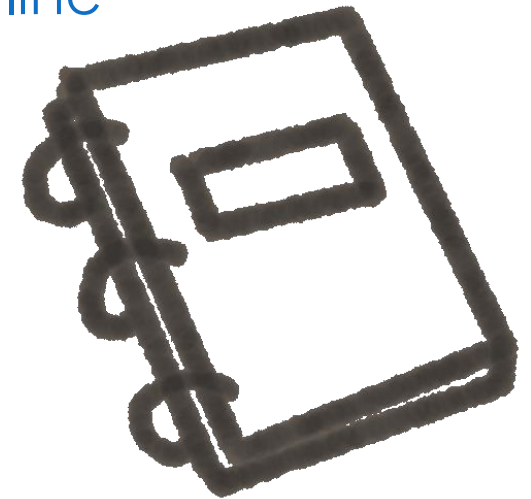
- Made cool by tech startups using the “Agile Methodology” (scrum)
- Can be used for day-to-day work, one-time events or projects
- Stand ups help teams manage themselves
- Military has been doing this for many years (roll call)
- Standing up and talking doesn't make it a stand up!

Taking Stand-ups Vertical



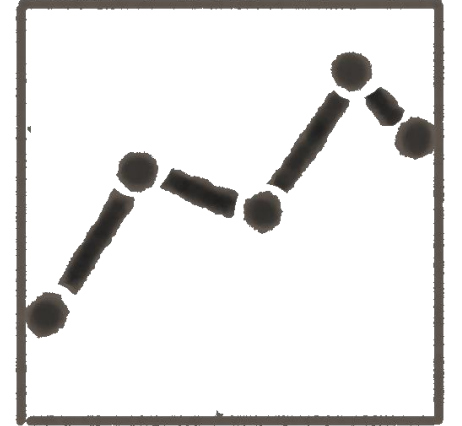
The Details

- This is a **team meeting**, NOT a report to management
 - No judgement, no blame
 - NEVER reprimand, criticize or correct staff – take it offline
 - Everyone is a teammate including the supervisor
- Requires discipline:
 - Attendance and participation is mandatory
 - Use a timer (not joking)
 - Same time, same place, every time
- Tip: Adjourn the stand up before socializing or moving on



“Stand Ups are sacred, make every effort to block your availability on Monday mornings and get your colleagues to work around it.”

The Results



- Points for trying something new and listening to the team
- Individuals became more organized by preparing for stand up
- Teamwork blossomed:
 - Teammates had different work but shared commitment
 - Team solved problems that were identified (without the manager!)
 - Team started balancing their workload themselves
- Showed staff how their work fit into the big picture (alignment & context)
- Engagement requires commitment: commit to giving staff a safe and consistent venue to talk about their work

Other tips

- Integrate a minute for announcements
- Rotate the chair, this is their meeting, not yours
- If you have a fix-it board, task board or story board, have the meeting near it – Update the boards before the meeting if possible
- Be patient, it took us 3 meetings to get under 15 minutes – after that we averaged 12 minutes!
- Lead by example – be prepared, be on time, be a teammate
- Block off time for post-stand up (offline) issues (30-60 minutes)
- And remember to have fun, put people at ease. Lead and let them lead.

More Information on Stand Ups

Great primer on Stand Ups even if it is IT based:

<http://martinfowler.com/articles/itsNotJustStandingUp.html>

Wikipedia: http://en.wikipedia.org/wiki/Stand-up_meeting

Thank You

- Thanks for your time!
- Thanks for your feedback!



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- Join our group on Yammer! Look up “Micro-Process Improvement”
<https://www.yammer.com/mcgill.ca>

*Graphics by Peter Morville