

The Art of Distance Coaching

Peg Pennington

October 13, 2011



Agenda

- Welcome
- Introduction of MBB Webcast Series
 - Larry Goldman, MoreSteam.com
- The Art of Distance Coaching
 - Peg Pennington, The Ohio State University
- Open Discussion and Questions



MoreSteam.com – Company Background

- Founded 2000
- Over 300,000 Lean Six Sigma professionals trained
- Serving over 50% of the Fortune 500
- First firm to offer the complete Black Belt curriculum online
- Offer MBB certification thru partnership with The Ohio State University
- Courses approved by ASQ and Project Management Institute (PMI)



Today's Presenter

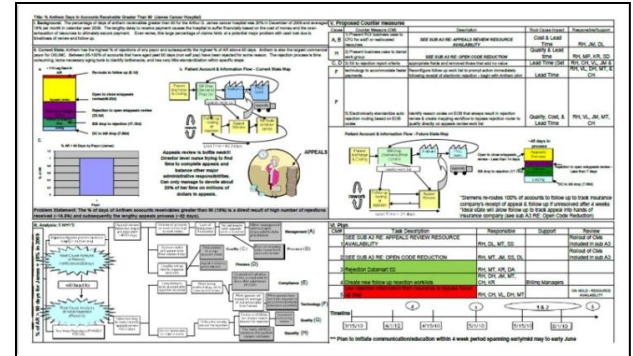


Peg Pennington

- Executive Director, Center for Operational Excellence (COE)
- Fisher College of Business
- The Ohio State University

Masters of Business Operational Excellence

- 12-Month Program
-December 2011 – December 2012
- Eight Sessions
-Wednesday to Saturday
(8am-5pm)
- Four joint sessions with
MBOE for Healthcare



MBOE Class Profile



Fisher Operations Faculty & Coaches

Award winning operations faculty and coaches

- Operations faculty have never traded an award for tattoos, cars or anything else!



Science **The ~~Art~~ of Distance Coaching**

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Managing Distance Learning



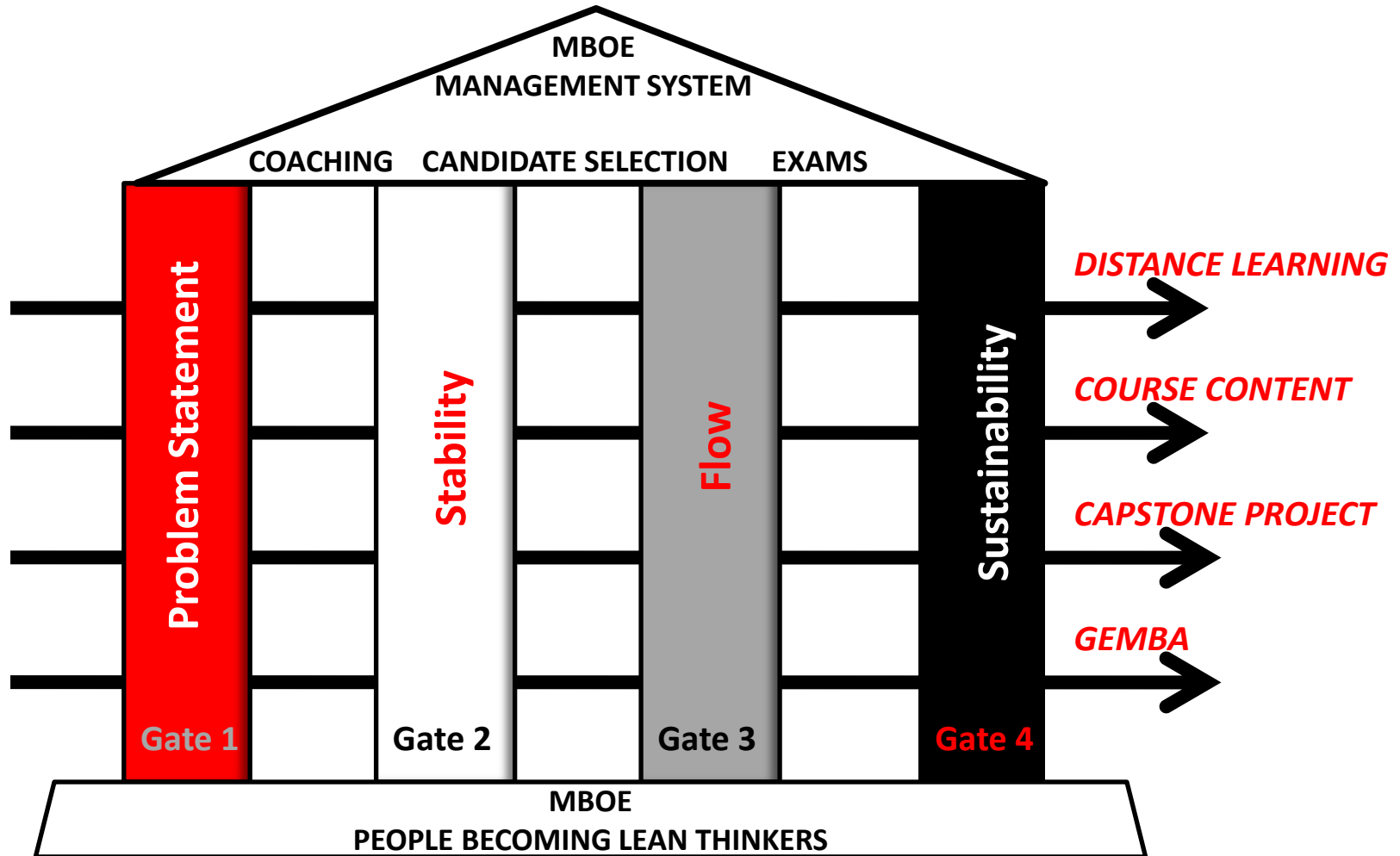
- Providing education to **students who may work on their own at home or at the office** and communicate with faculty and other students through various forms of computer-based communication.
- The intent is to produce a **virtual** classroom accessible from virtually all computer platforms.
- We utilize e-mail, chat rooms, pre-taped and live webinars and instant messaging to accomplish our distance learning.

The Goal of MBOE



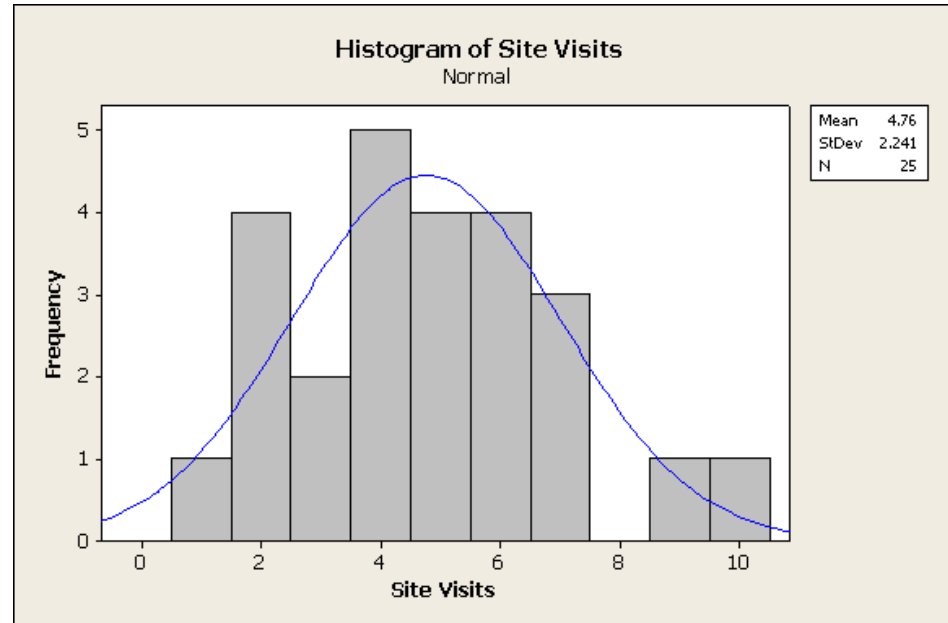
Create a lean leader

Expectations of Students



The Problem Statement

There is a gap in the in the amount and type of coaching students receive in the MBOE program.



The Problem Statement

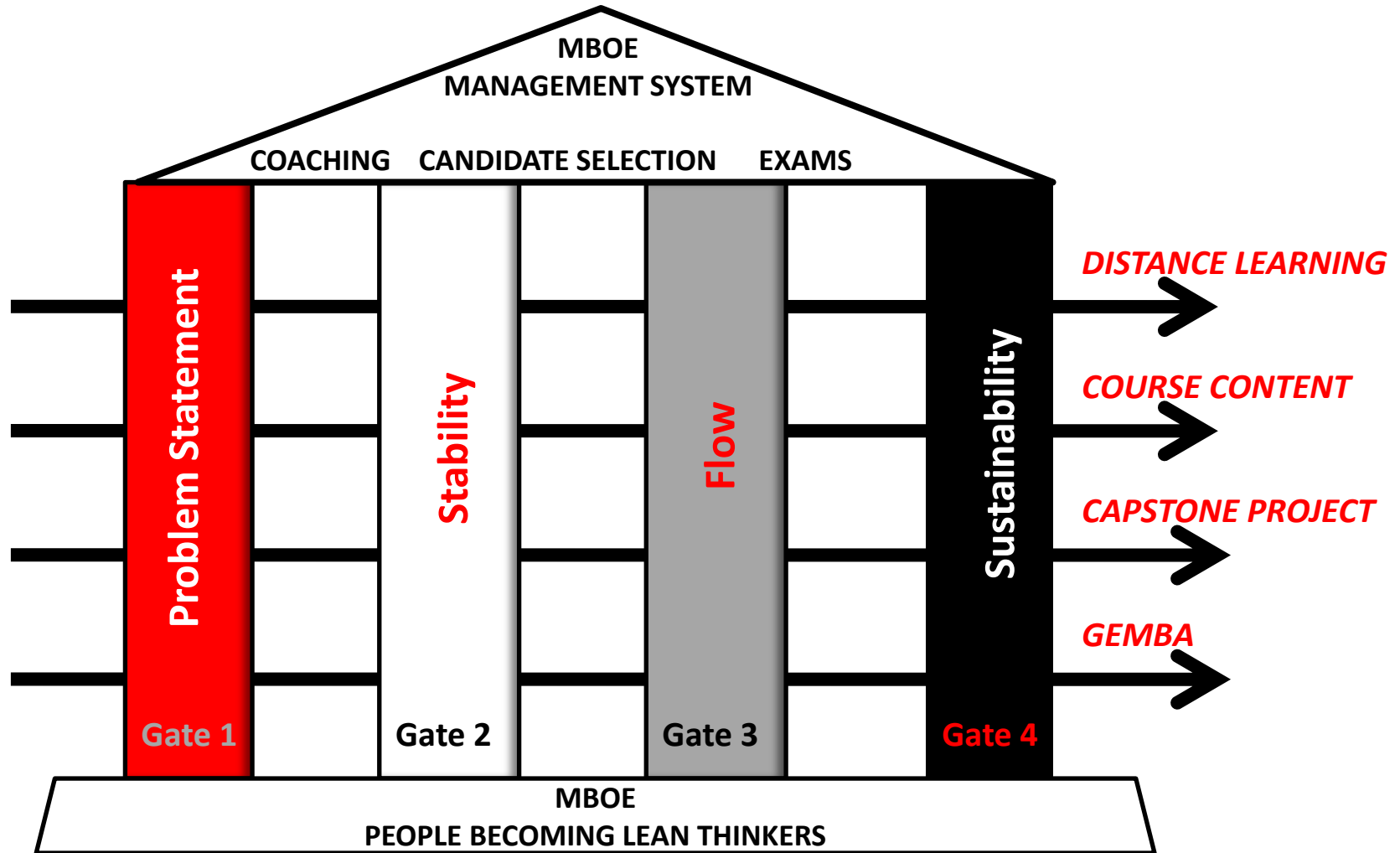


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The Problem Statement



Expectations of Students



Key Characteristics of a Good Coach

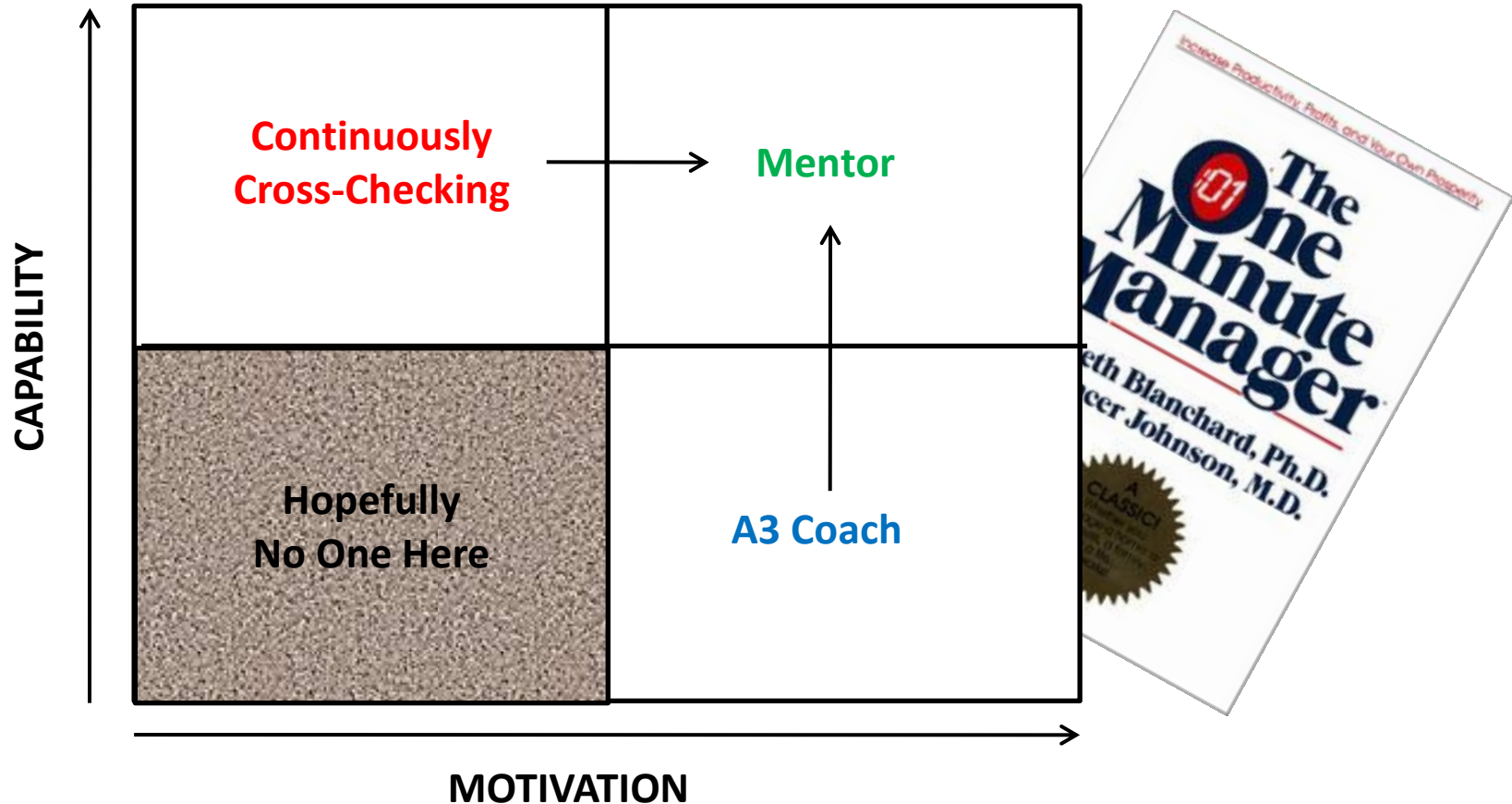
- Eight to ten years of lean **experience in the workplace** with demonstrated results in organizational improvements.
- Practical **experience with all of the foundational tools** of Lean and in depth experience with either Six Sigma/Jidoka or JIT/Leveled Flow.

Key Characteristics of a Good Coach



- Ability to recognize other coaches as peers and respect the skills and experiences they bring to the program.

What is the Need for a Coach?



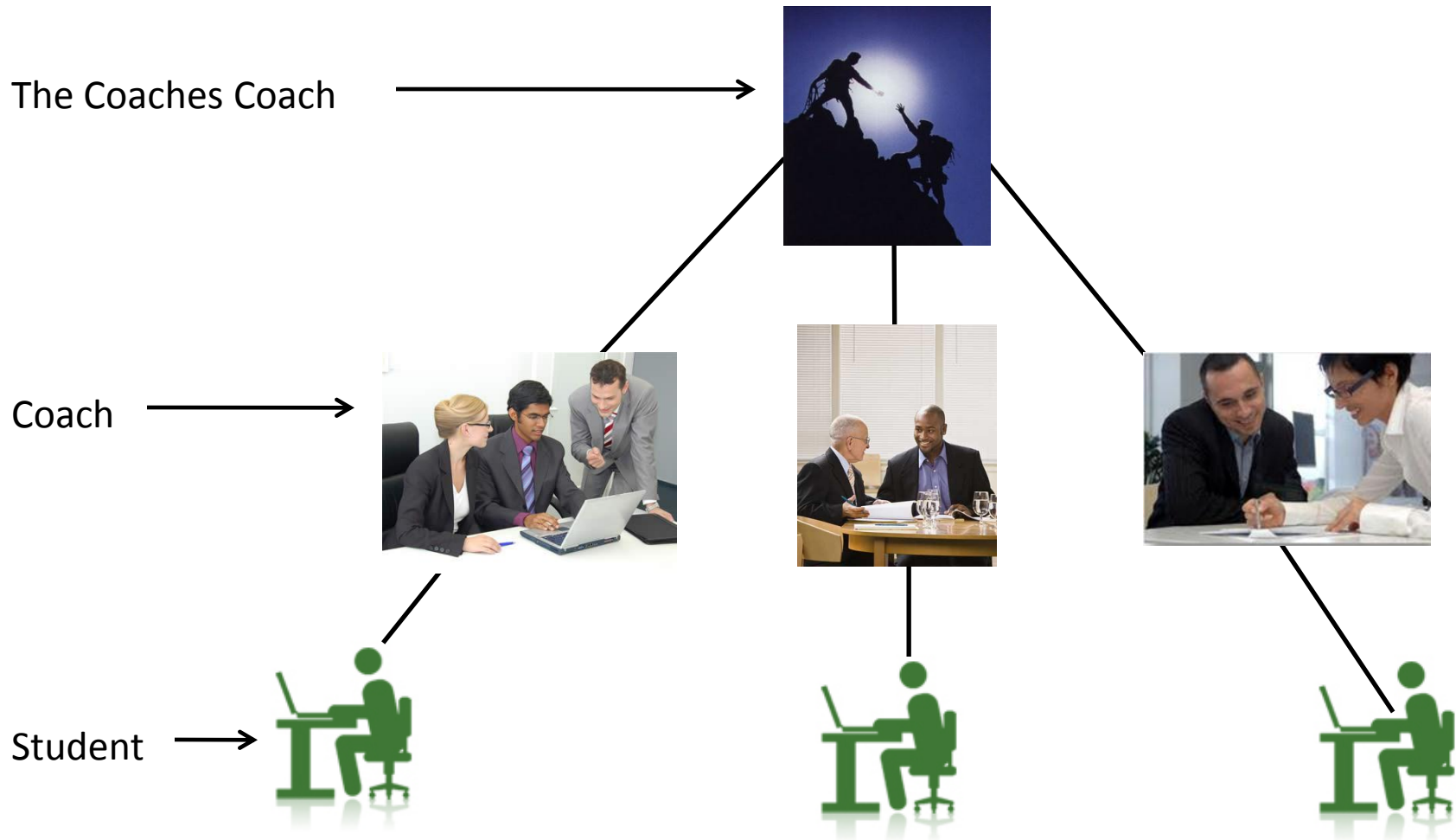
“Our job as Leaders is not to answer the question, but to keep the question alive until the best answer can be found.”

-Unknown

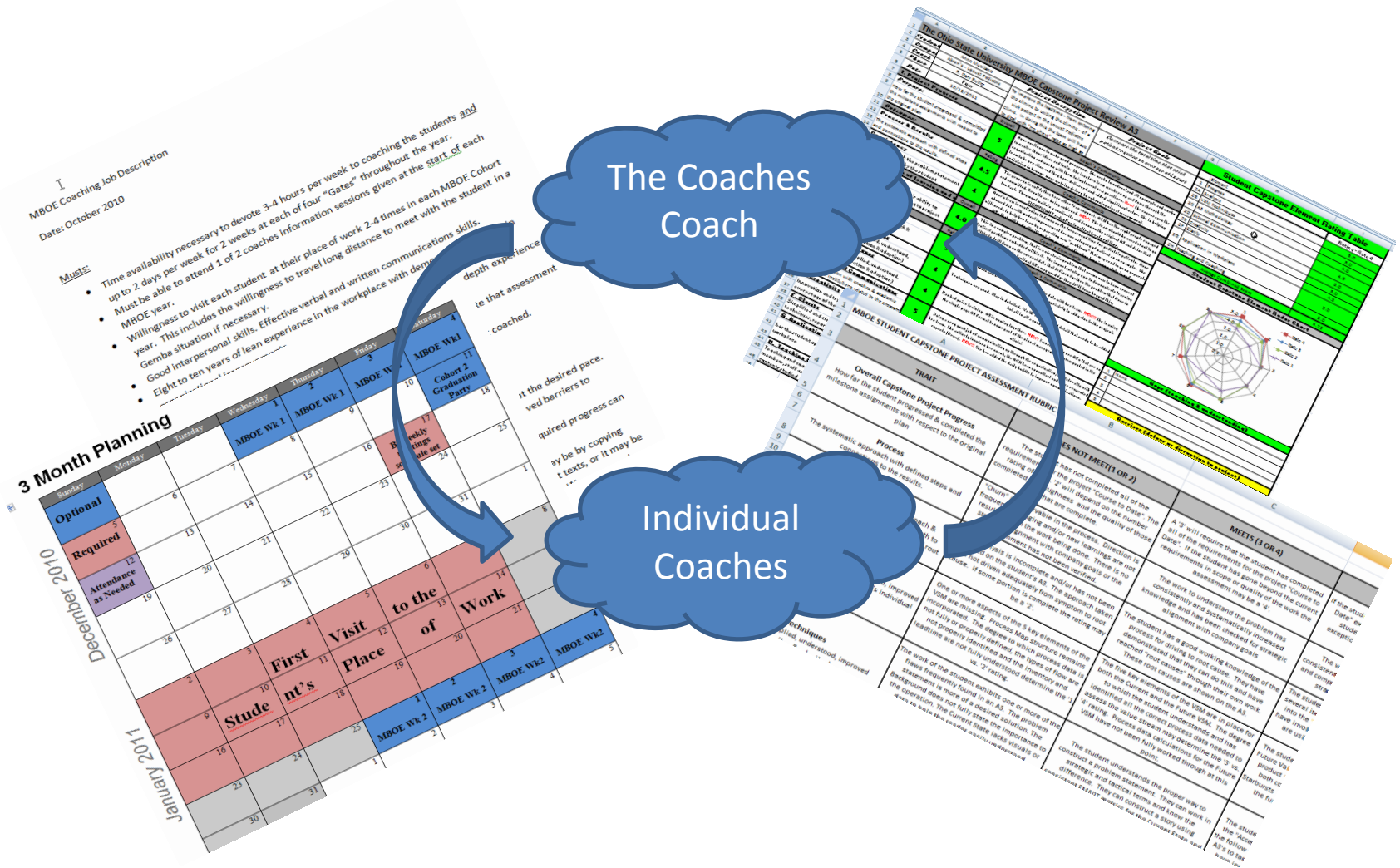
Key Characteristics of a Good Coach

- Ability to be empathetic with students who may not be progressing at the desired pace.
- Patient enough to help the student work through their real or perceived barriers to progress.
- Firm enough to insist that those barriers be addressed so that the required progress can be achieved.

Communication and Visual Management



Tier 2 Communications



Communicating to Coaches

Coaches Newsletter

MBOE Cohort 3

Session 2

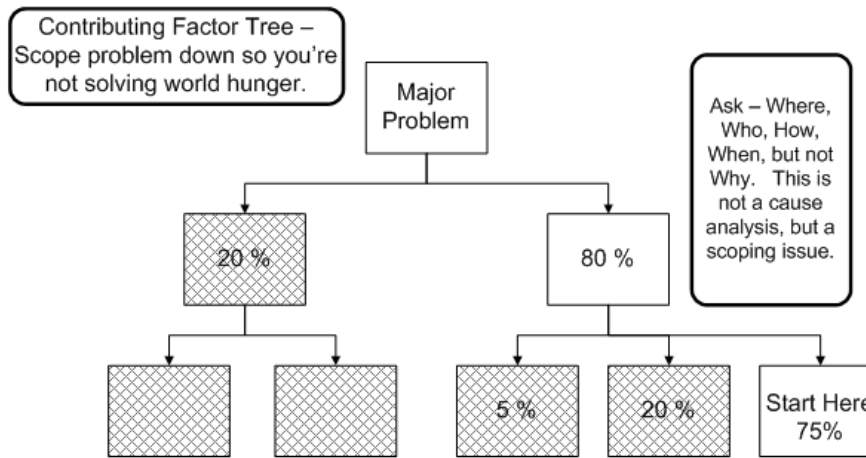
Value Stream Management

January 26th – 29th

Major Topics for the week covered:

A3 Thinking– Tracey Richardson, a former Toyota trainer, spent a day with the students sharing her wisdom on the A3. Tracey placed a great deal of emphasis during her presentation on changing the culture by asking the right question. Major points from Tracey's presentation:

- Cultural - this is about leading teams and leading change. Tracey emphasized *Learning and Leading*. She emphasized that the A3 is only as good as the dialogue used to create the document. Students need to go to Gemba and ask:
 - What is happening?
 - What should be happening?
- Contributing Factor Tree – Tracey shared a nice mechanism for scoping their project back. She called it a Contributing Factor Tree – you may be using something like this but calling it another name. It resonated very well with the class and I assume it will show on some projects.



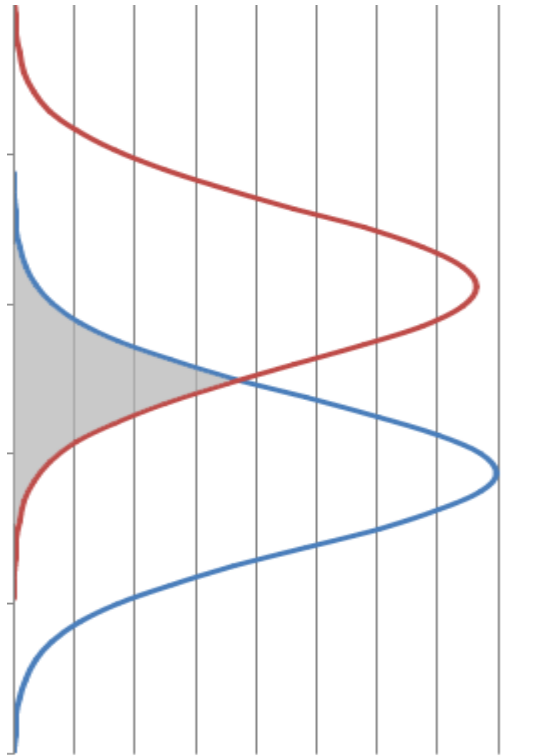
Assessing the Student

TRAIT	DOES NOT MEET(1 OR 2)	MEETS (3 OR 4)	EXCEEDS (5)
Overall Capstone Project Progress How far the student progressed & completed the milestone assignments with respect to the original plan	The student has not completed all of the requirements for the project "Course to Date". The rating of '1' vs. '2' will depend on the number completed, thoroughness and the quality of those that are complete.	A '3' will require that the student has completed all of the requirements for the project "Course to Date". If the student has gone beyond the current requirements in scope or quality of the work the assessment may be a '4'.	If the student has gone well beyond the "Course to Date" expectations a '5' may be awarded. The student should also have demonstrated exceptional analysis and significant ability to personally lead the project
Process The systematic approach with defined steps and connections to the results.	"Churn" is observable in the process. Direction is frequently changing and/or new learnings are not resulting from the work being done. There is no strategic alignment with company goals or the alignment has not been verified.	The work to understand the problem has consistently and systematically increased knowledge and has been checked for strategic alignment with company goals	The work to understand the problem has consistently and systematically increased student and company knowledge. The work has improved strategic thinking and company goals
Analysis Evaluates the consistency of the approach & techniques for root cause analysis, the depth to which the work is done and the ability to get to root causes.	The analysis is incomplete and/or has not been reflected on the student's A3. The approach taken has not driven adequately from symptom to root cause. If some portion is complete the rating may be a '2'.	The student has a good working knowledge of the process for driving to root cause. They have demonstrated that they can do this and have reached "root causes" through their own work. These root causes are shown on the A3.	The student has shown an ability to work through several iterations of asking "Why", driving deeper into the "root causes" with every iteration. They have involved many process owners in this activity are using advanced techniques (e.g. affinity diagrams, etc.) for analysis.
VSM Techniques Assess how the tool is applied, understood, improved (innovation & adaption) for the student's individual project	One or more aspects of the 5 key elements of the VSM are missing. Process Map structure remains incorporated. The degree to which process data is not fully or properly defined, the types of flow are not properly identified and the inventory and leadtime are not fully understood determine the '1 vs. '2' rating.	The five key elements of the VSM are in place for both the Current and the Future VSM. The degree to which the student understands and has identified all the correct process data needed to assess the value stream may determine the '3' vs. '4' rating. Process data calculations for the Future VSM have not been fully worked through at this point.	The student has completed both a Current and a Future Value Stream map for their operation. The product family has been properly identified by both common processes and scope of work. Starbursts indicate key projects required to achieve the future state which are consistent with organization strategy.

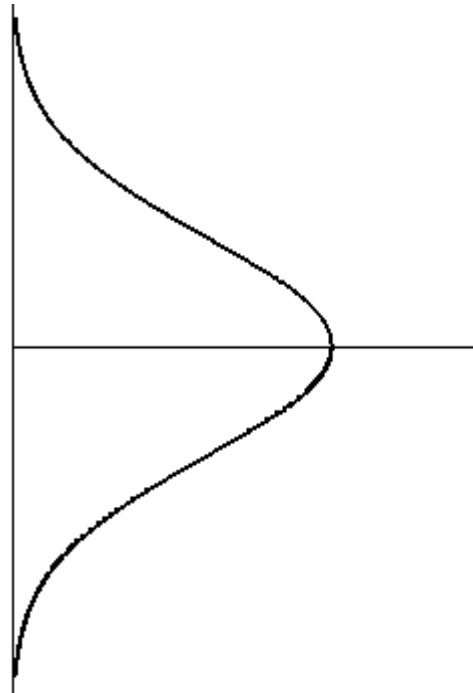
Assessing the Student

The Ohio State University MBOE Capstone Project Review A3				Student Capstone Element Rating Table	
Student	Anne Musitano	Project Description	Project Goals	Element	Rating - Gate 4
Company	Akron's - Locust Pediatric	To improve the leadtime - from entering the clinic to exiting the clinic - of a sick patient in the Locust Pediatric Clinic. In doing this the team will have to deal with "no show" rates as high as 48% and an increasing load from	Decrease the total time that a sick patient requires on average at Locust	1 Progress	5.0
Coach	R. Gary Butler			2A Analysis	5.0
Phase	Four			2B VSM Techniques	4.0
Date	10/16/2011			2C A3 Methodology	4.0
1. Project Progress	Overall	Coach's Comments		2D External Communication	5.0
Purpose:	5	Anne continues to make good progress. She seeks to understand all concepts and works to master those ideas and tools. She involves team members up and down through the organization and works with them to implement new practices. NEW! She encourages the team to be creative and they have delivered and added significant value. She is helping pediatrics to become more metrics driven by		2E Creativity	5.0
How far the student progressed & completed the milestone assignments with respect to the original plan				2F Clarity	4.5
Outcomes:	Rating	Coach's Comments		2G Application in Workplace	5.0
Process & Results	4.5	The process is solid, they have other lean support. ACH has the right people engaged and committed. Results are being achieved. NEW! The team should be careful not to go too fast. They must maintain a continuity and focus on the original A3 and drive that SIGNIFICANT reduction in patient treatment time.		2H Teaching and Coaching	5.0
Consistency	4	Anne's team is continuing to focus on the turnaround time for pediatric patients. Anne showed data with modest improvement for one category of patient as an example. She still needs to help her team by separating new "problems" that may need to go on separate A3's that will be dealt with on later projects after her time is		Average Combined Score	4.72
Consistency with the problem statement originally set out by the student				Student Capstone Element Radar Chart	
2. Verification of learning and application	Overall	Coach's Comments		<p>Legend: Gate 4 (red), Gate 3 (blue), Gate 2 (green), Gate 1 (purple)</p>	
Purpose:	4.0	This is a complex problem, that is a strategic problem that seems now to have several tactical problems embedded within it. The important step now to demonstrate learning will be to drill down on the correct data that defines further the problem that Anne is seeing. Specific tactical A3's may need further drill down			
Outcomes:	Rating	Coach's Comments			
A. Analysis	5	Anne continually has taken deeper dives into the data with her team. NEW! She is using statistical tools and DMAIC consistently and appropriately to add value to the project.			
root cause analysis approach & techniques					
B. VSM Techniques	4	Techniques are good. Map is detailed. We ID'ed additional detail that needs to be added but all in all a good job.		Gaps (teaching & understanding)	
How the tool is applied, understood, improved (innovation & adaption)				1 None	
C. A3 Techniques	4	Has had prior training. A3 is coming together. NEW! I would like to see A3's that are on the single page A3 format become part of the visual management system posted in the clinic!		2	
How the tool is applied, understood, improved (innovation & adaption)				3	
D. External Communications	5	Doing a very good job of communicating up through the organization, and laterally with her team. She actively involves her coach, the ACH Lean consultant and other respected experts (Drew). NEW! She has added the daily huddle to improve communications.		4	
Communication with coaches & academic staff, other institutions related to the program				5	
E. Creativity	5	The team has created standard work and sign-offs by each team member. The 3P activity brought needed clarity to ways to improve process and better handle the increased workload. NEW! Now working on versions of a registration cart and a triage cart. Will be starting Std. Work for Mgrs. in Sept.		Barriers (delays or disruption to project)	
Innovation and trying new concepts at every stage of the process				1 None.	
F. Clarity	4.5	NEW! Visual management in the clinic continues to expand. Information/Visual Management that has been in the past continues to be clarified and enhanced.		2	
Simplified and clear approaches, techniques, reports easy to observe and				3	
G. Application in Workplace	5	Anne's team continues to work with checklists and is helping the entire team understand how best to deal with each child who enters the clinic. They have produced waste walks and spaghetti diagrams on motions to improve their processes. NEW! You can actually now see the teams themselves doing the improvement work with less and sometimes little input from Anne.		4	
has the student applied learning to the workplace				5	
H. Teaching & Coaching Others	5	Between 5S and her VSM workshops Anne is doing an excellent job of teaching others. She will need to continue to work hard at this as there are a number of key stakeholders and managers to "win over."		Key Next Steps	
Teaching and coaching other company members, staff and colleagues on the contents studied				1 Establish a better replenishment system for supplies in MRI. NEW! Set in Order is complete. The team should follow through with a card based reordering system to achieve "standardize".	
				2 I would like to see metrics collected real time for each type of patient. The team should work to prove actions already ID'ed are improving performance. Where they are not or the progress is not sufficient reassessment should occur and another Kaizen planned.	
				3 Manage the Implementation of 3P "Best Plan" through to completion to assure	
				Overall Progress	

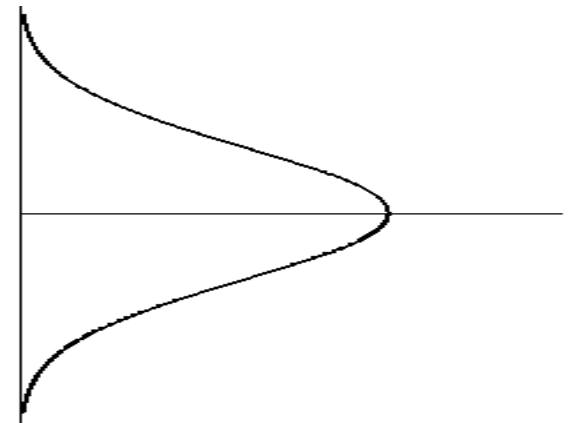
Standardizing Results



Year 1

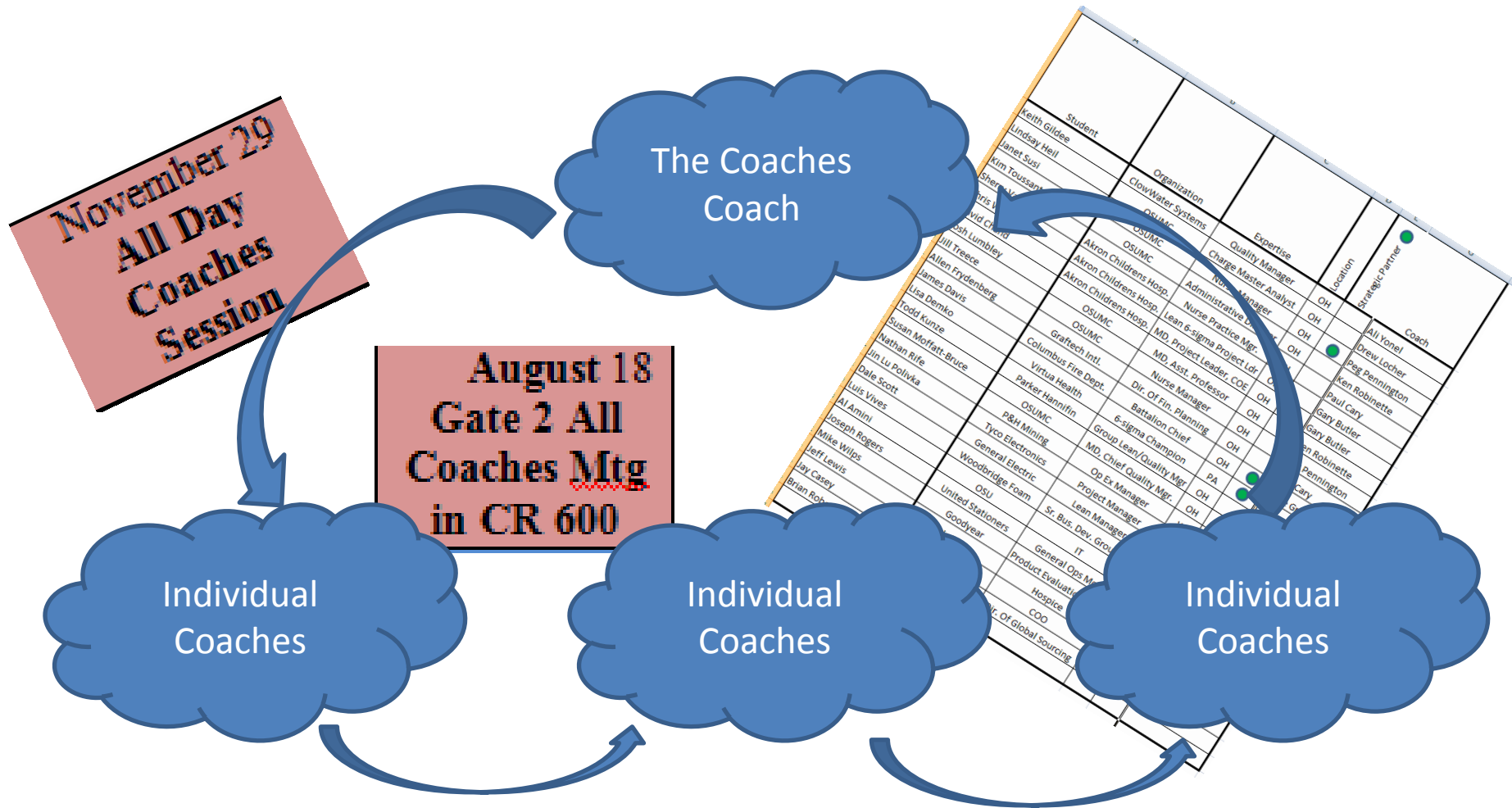


Year 2



Year 3

All-Coaches Communications



Preparing the Coach

- Full day preparation session for all coaches
- Topics
 - Discuss the characteristics of a good coach
 - Review program content
 - Review Student and Coaches schedule for the year
 - Discuss project general expectations and assessment
 - Provide feedback to coaches from prior year student assessments
 - Discuss Student/Coach matchups for the new year

Matching The Coach to the Student

Student	Organization	Expertise	Location	Strategic Partner	Project Title	Coach
Keith Gildee	ClowWater Systems	Quality Manager	OH		Improve Quality and leadtime at the Fitting Foundry	Ali Yonel
Lindsay Heil	OSUMC	Charge Master Analyst	OH		Critical Test Results & Values for Healthcare FMEA	Drew Locher
Janet Susi	OSUMC	Nurse Manager	OH		Improve E.D. Decision to Admit to Inpatient Bed	Peg Pennington
Kim Toussant	OSUMC	Administrative Director	OH		Reduce Clinical Research Project Initial Startup Time	Ken Robinette
Sherry Valentine	Akron Childrens Hosp.	Nurse Practice Mgr.	OH		Redesign of the NeuroDevelopmental Science Center	Paul Cary
Chris Weisbrod	Akron Childrens Hosp.	Lean 6-sigma Project Ldr	OH			Gary Butler
David Chand	Akron Childrens Hosp.	MD, Project Leader, COE	OH		Improve Access Time to Outpatient Pediatric Psychiatric Care	Gary Butler
Josh Lumbley	OSUMC	MD, Asst. Professor	OH		1st Case Operating Room Starts at OSUMC	Ken Robinette
Jill Treece	OSUMC	Nurse Manager	OH		Improving Operating Room Efficiency	Peg Pennington
Allen Frydenberg	Graftech Intl.	Dir. Of Fin. Planning	OH		Operational Excellence in Accounts Payable at GrafTech	Paul Cary
James Davis	Columbus Fire Dept.	Battalion Chief	OH		Improve Efficiency of City Emergency Medical System	Steve Gran
Lisa Demko	Virtua Health	6-sigma Champion	PA		Computerized Physician Order Entry System Problems	Drew Locher
Todd Kunze	Parker Hannifin	Group Lean/Quality Mgr	OH		Hydroncarbon Filtration Value Stream Improvement	Ali Yonel
Susan Moffatt-Bruce	OSUMC	MD, Chief Quality Mgr.	OH		Integration of Perioperative Care to Improve Patient Safety	Helen Zak
Nathan Rife	P&H Mining	Op Ex Manager	WI		Leadtime Reduction for Large Welded Structures	Ali Yonel
Jin Lu Polivka	Tyco Electronics	Project Manager	N.C.		Material Replenishment for Improved Leadtime/Delivery	Drew Locher
Dale Scott	General Electric	Lean Manager	OH			Steve Gran
Luis Vives	Woodbridge Foam	Sr. Bus. Dev. Group Ldr	Can			Kent Sears
Al Amini	OSU	IT	OH		Improving OSU's Web Hosting Service Reliability	Kent Sears
Joseph Rogers	United Stationers	General Ops Mgr.	OH		Improved Operational Efficiency in Short Turn Orders	Kent Sears
Mike Wilps	Goodyear	Product Evaluations Mgr.	OH		Flow of Product Development/Mold Procurement Process	Paul Cary
Jeff Lewis	InCare	Hospice	OH		Improve Connection of Hospice Services to terminally ill	Doug Evans
Jay Casey	OSUMC	COO	OH			Gary Butler
Brian Robertson	Greif	Dir. Of Global Sourcing	OH			Ali Yonel

Key Characteristics of a Good Coach

- Time availability necessary to devote **2-3 hours per week to coaching** the students and **additional time** at each of four “Gates” throughout the year.
- Willingness to **visit each student** at their place of work 2-4 times in each MBOE Cohort year. This includes the willingness to travel long distance to meet with the student in a Gemba situation if necessary.
- Good interpersonal skills. Effective verbal and written communications skills.

Coaches Calendar

3 Month Planning

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
December 2010	Optional 1			MBOE Wk 1 2	MBOE Wk 1 3	MBOE Wk1 4	MBOE Wk1 5
	Required 6						Cohort 2 Graduation Party 7
	Attendance as Needed 8					Bi-weekly meetings schedule set 9	
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
January 2011	24	25	26	27	28	29	30
	31	1	2	3	4	5	6
	7	8	9	10	11	12	13
	14	15	16	17	18	19	20
	21	22	23	24	25	26	27
	28	29	30	31	1	2	3
				MBOE Wk 2 4	MBOE Wk 2 5	MBOE Wk2 6	MBOE Wk2 7

Thank you for joining us



Resource Links and Contacts

Questions? Comments? We'd love to hear from you.

Peg Pennington, Exec. Dir. of COE, The Ohio State University
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Larry Goldman, VP Marketing, MoreSteam.com
lgoldman@moresteam.com

Additional Resources:

Archived presentation, slides and other materials:

<http://www.moresteam.com/presentations/>

Master Black Belt Program: <http://www.moresteam.com/master-black-belt.cfm>

Master Black Belt Program

- Offered in partnership with Fisher College of Business at The Ohio State University
- Employs a Blended Learning model with world-class instruction delivered in both the classroom and online
- Covers the MBB Body of Knowledge, topics ranging from advanced *DOE* to *Leading Change* to *Finance for MBBs*

