

Lean Delivers Visibility into Workforce Performance.



Rapid growth in a leading management services organization (MSO) had greatly expanded its market territory and revenue potential but also decreased its transparency into workforce performance. The MSO tasked Freed with designing and deploying a new Lean management system across the organization.

Problem to Solve

Rapid growth in a leading management services organization (MSO) had greatly expanded the MSO's market territory and revenue potential, but also decreased its transparency into workforce performance. With markets and employees increasingly dispersed around the country, front-line employees did not have a clear view into overall organizational goals and initiatives, and thus their individual and departmental goals were not connected. Conversely, the MSO's senior leadership lacked visibility into the status and progress of its front-line functions. The MSO's leaders knew they needed a better way of managing the organization's daily work and monitoring

performance and productivity. They wished to adopt a Lean management system, due to Lean's inherent emphasis on continuous improvement and respect for employees. The leaders also acknowledged that there was no capacity within the MSO to develop and deliver a new enterprise-wide management system.

Based on the MSO's prior experiences with Freed Associates (Freed) and Freed's extensive experience building and implementing customized Lean management systems, the MSO tasked Freed with designing and deploying a new management system across the organization. The MSO needed Freed to complete the work within five months, approximately half the time normally needed to implement a management system changeover of this size and scope.

Strategy and Tactics

To address the need for greater visibility into both strategic and front line operational goals and performance, Freed developed a customized set of tools to implement active daily management (ADM) in the organization. A significant part of this work included building a solution that provided insight into employee adoption and use of these tools. This was particularly important given the fact that most of the MSO's employees work virtually and are spread across nearly a dozen distinct market territories.

As with any change initiative, gaining employee acceptance can be challenging. Therefore it was critical for Freed to focus on a change management plan when training and introducing the new management system. The change management plan introduced the employees to the "why?" behind the new management system and the value it would bring to employees, long-term. Freed's change management plan also included a high-level rollout plan for the ADM initiative, including a communication plan for leaders and employees, and customized presentation materials.

Freed's development of Lean-based ADM tools was designed to help the MSO's senior leadership and front line teams improve transparency into goal progress, make course corrections and sustain past improvements. All of this work was wrapped within a management system focused on sustaining a culture of continuous improvement and respect for all employees. Specific Freed-customized tools included:

- A standardized huddle agenda
- A sample visibility board
- Simple ADM training materials
- Problem-solving templates (A3 templates)
- MSO-specific training materials
- MSO-specific FAQs about the new ADM tools

Over several weeks, Freed planned and executed the introduction of the ADM tools to the enterprise, via virtual

sessions with the MSO's workforce. These included, in sequential order:

- **Introduction to ADM tools for teams and leaders** – This included separate sets of introductory materials for teams and leaders, as well as specific training sessions for each group
- **Coaching sessions and huddle observations** – Freed hosted multiple team and leader coaching sessions, to support the introduction of the new management system and ADM tools; this included observing and offering feedback on team huddles
- **Champion training materials** – Freed developed and delivered targeted training for identified “ADM champions” within the MSO, to aid with employee adoption and company transformation
- **“Train the trainer” sessions** – For designated ADM trainers within the MSO, Freed provided input on the ADM tools, as well as feedback to the trainers on their effectiveness
- **Problem-solving training material (A3 training materials)** – To facilitate problem-solving, Freed customized the MSO's A3 templates to meet the organization's specific needs, and trained designated MSO trainers on their use

Results

With consistent application and coaching from Freed and key leaders, the MSO's teams successfully implemented the ADM tools in their daily work, despite initial resistance from some leaders and team members. This effort improved overall transparency within the organization, benefitting both front-line employees and senior management. Initial reports from the MSO's leaders and teams revealed a high level of satisfaction with Freed's assistance and the tools themselves, and in turn greater visibility into daily work and performance.

Freed provided the team with baseline metrics to help leadership track the future success of the new management system. Freed also recommended that the MSO's leadership continue ongoing coaching on the use of the ADM tools. As this MSO continues to grow, it will be critical that its new management system becomes core to everyday business, and that the ADM tools become embedded within the MSO's culture.