

Case Study



Seating Solution

An education learned by doing and presenting with the audience in mind

Topic
Training

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My first experience operating within the realms of lean and Six Sigma started with my discovery of a Department of Defense (DoD) instruction titled "Implementation and Management of the DoD-Wide Continuous Process Improvement/Lean Six Sigma (CPI/LSS) Program."¹ At the time, I had been in the U.S. Navy for 21 years and had never heard of CPI or LSS.

This discovery started my trajectory into the worlds of lean, Six Sigma, project management and quality, and toward an attribute of all worlds: knowledge management. Knowledge management is the understanding of what information you have and includes the sharing, transferring, capturing, storing and converting of tacit and explicit knowledge into usable assets.

My story will be told through our command's first attempt at a formalized process improvement (PI) event and will take you through the challenges and lessons learned, as well as my personal growth in CPI. A "command" in military terminology is an organizational unit for which a military commander is responsible.

Getting buy-in for PI

"Implementation and Management of the DoD-Wide Continuous Process Improvement/Lean Six Sigma (CPI/LSS) Program"² focused on the establishment of processes, increased communication of CPI objectives, promotion of a CPI culture and increased collaboration between DoD component organizations. The goal for the defense components was to have 1% of each organization made up of LSS Black Belts (BB) and 5% LSS Green Belts (GB).³ Our command's CPI/LSS intent was to manage the expectations of staff coming for training, while easing access and delivering excellence.

Our focus was on providing training at the integrated phases for carrier and expeditionary strike groups. Each strike group comprises a large ship of about 5,000 sailors and Marines, as well as smaller supporting commands including cruisers, destroyers and aviation squadrons with many additional supporting commands.

The integrated phase is a phase of training in which the strike groups begin training in a simulated, virtual networked environment pierside and

move to underway events. The strike group staff includes the admiral, who is responsible for the conduct of all commands underneath him or her, the commanding officers and the officers responsible for defending the ships. We also provided training to ship and submarine personnel throughout the year—sometimes simultaneously—through classroom, trainers and fleet exercise mentorship and evaluations. This event is the initial classroom training to support the pier side and underway events.

Our overall goal was to deliver excellence to staffs that visited our command for training. We had no data to support conducting this event, but we did have qualitative feedback, or voice of the customer input, which was enough to start our event. After conducting a suppliers, inputs, process, outputs and customers (SIPOC) analysis, we selected parking, screening computer disks, badging and other processes to get personnel into the building for their training without delay. It may sound trivial to a civilian, however, these processes become the satisfiers and delighters for some military personnel. We called the event “Butts in Seats.”

The idea to conduct a *kaizen* event was greeted with doubt because, like most new things, change can be a difficult obstacle to push past. I needed to convince the chain of command of the benefits of conducting a *kaizen* event to develop a PI culture. We wanted to start small to transition the “language barrier” and find a language that the command would adopt. We saw many opportunities for improvements in managing the expectations of personnel coming to command for training.

An internal challenge we needed to overcome to conduct the first PI event was personnel turnover. Command personnel turnover affected corporate knowledge because officer assignments average one and a half to two years, and enlisted assignments average three years. Turnover of a new executive officer (XO) overlapped with the execution of the event.

Part of the military culture is a “wait them out” attitude in which waiting for people to transfer—especially if their ideas are not accepted or are ordered by the seniors in the command—is a norm. We did not meet the minimum command percentages for GBs or BBs, even though the command had both contracted, as well as government service support with the active duty personnel.

The event

The command authorized a *kaizen* event. Training for our command was required at all levels because our military and contracted personnel lacked certifications in lean and Six Sigma. Two officers had formal GB classroom training, one officer had official BB and lean online training, and one contractor was a certified GB. No enlisted personnel had Six Sigma experience.

Junior personnel wanted to learn, but had little support. There was pushback from those more senior because of prior military experience with total quality management in the mid-1990s. By the time we started this event, I had been through my initial GB coursework, knew a bit about the language and definitions, and was an instructor in the Navy. I also invited an ASQ-certified BB who supported a local Navy command to offer an LSS briefing alongside me, which lent credibility to our event.

Conducting organizational training

The training began with hesitation because, like any school, the language was a bit strange for the command. Still, considering that Navy personnel all needed to learn military-specific jargon, the language barrier went away in the first couple of days of use. Personnel from each division involved in supporting the strike group staff training comprised the team. There were business rules set in place, with the most important being that everyone had a voice and an opportunity to speak. In a military environment, intimidation by rank can be a showstopper.

Because we also were teaching other classes while we were conducting the training, the training was spread out over a couple of days to allow everyone to attend and included LSS familiarity along with hands-on SIPOC and value stream mapping (VSM) training.

As part of the VSM, we conducted *gemba* walks for each area identified in the SIPOC. I was the only one teaching, and I feared failing if the attendees did not understand what I was teaching them or did not agree with what we were discussing.

For 10 years before this PI event, I had taught courses at this command and led training team events onboard ships and for ships, so while I had plenty of experience teaching and training, I had never formally taught PI. The PI training was successful because the personnel who attended the training understood it, used it and were proud enough to share their knowledge with teammates.

Our PI event and our unplanned challenge

After we had completed training and planned for six months to integrate the event’s PI concepts into the strike group event, we felt we were ready to succeed. Months in advance, we had screened security clearances to smooth the badging process, scripted a screening time, scanned disks to prevent viruses coming through the building and assigned seats in advance.

Most importantly, to set the right tone, we set up a parking plan so the staff members felt they were the priority in our command’s parking lot. What we did not consider in all the planning was that the turnover of our XO—the CEO’s right-hand officer who is responsible for the day-to-day operations of the command—would affect some of our event planning.

Our newly assigned XO was aware of the strike group training, but not of our PI event. He wanted to ensure the strike group seniors had priority assigned parking. I did not have an opportunity to brief him on the event during his first week because he had more senior officers to meet with before me. Although I had briefed him when his ship

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entered the Arabian Gulf while stationed in Bahrain, that did not give me carte blanche to walk up to him to discuss the plan.

My meeting with the new XO was scheduled for the end of the week. The commanding officer and outgoing XO did not brief the new XO on the PI event. Unfortunately for the team, the plans the XO made and the idea we made were not shared. Because we found out about the XO's ideas too late to have any influence, we moved ahead using the XO's parking concept. Fortunately, we were able to maintain the rest of our plan.

The endgame

At the conclusion of the staff group's training event, the strike group was pleased with the changes made to get them to their seats because our command communicated more frequently to ensure all knew the process and they had less delay getting badges each morning of their event. They also were happy with the parking because the senior personnel did not have to get to the training event early just to secure parking.

We came away with lessons learned that supported integration of LSS terminology and relating PI to Navy practices. My personal lesson learned was that I needed to insist that the commanding officer and (outgoing) XO not delegate event sponsorship and not be aware of what was going to happen. Sponsorship of the PI event had been delegated to the director of training, who never asked what the plans were for the event. We determined communication and knowledge sharing to be a necessary requirement of any PI process through the various ranks at the command in any future PI events.

We conducted a debriefing four days after the event concluded. The new XO, our sponsor, the team and any interested personnel attended the debriefing. The event was deemed a good start by leadership, but the XO wanted to know what we saw that had gone differently than planned. As the team lead, I was responsible for telling the XO the good and the bad.

Although I was comfortable briefing him, I did not want to start off on the wrong foot with the XO, knowing I still had at least a year with him in command. When I explained what the team saw, he asked who created the parking plan disruption. I hesitated, and he asked, "Was it me?" Indirectly, I told him it was, but we ran out of time to talk to him before the event. Thankfully, he accepted that response. In the end, the command leadership considered the PI event a success.



Just the beginning

The PI team made considerable improvements moving from decentralized processes with individuals being leads to centralizing in one module. We did our best to get away from the "We've always done it that way" mentality. The most significant part of the internal improvements was that people were joking using Six Sigma terminology, and the team was retaining the knowledge. The team planned to continue these types of events. In the big scheme, "Butts in Seats" was a success, but I considered the parking issue a failure on my part because I was not able to reach the XO before he made changes.

Each speaking opportunity gets easier. All events I support—virtual and in person—have unique challenges of their own. I continue to learn and speak at various conferences comprised of audiences with different experiences and varying opinions. Still, it was the "Butts in Seats" event, along with the DoD instruction, that opened my eyes to the world of PI and led to my interests in all things knowledge management as related to process and operational excellence. &

REFERENCES

1. U.S. Department of Defense, "DoD Instruction 5010.43, Implementation and Management of the DoD-Wide Continuous Process Improvement/Lean Six Sigma (CPI/LSS) Program," 2009, <https://tinyurl.com/us-dod-cpi-lss>.
2. Ibid.
3. Ibid.

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