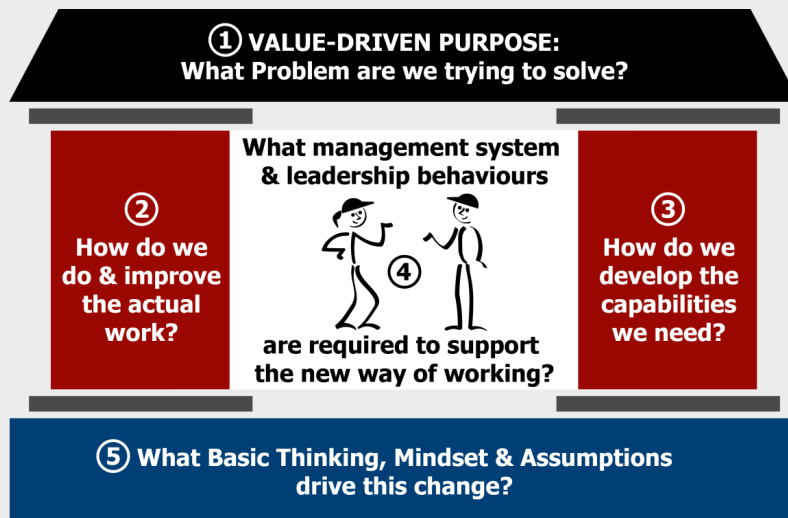




# Lean Transformation Framework

## Knowledge: Skill Level 1



# Teach Poster Facilitation Guide

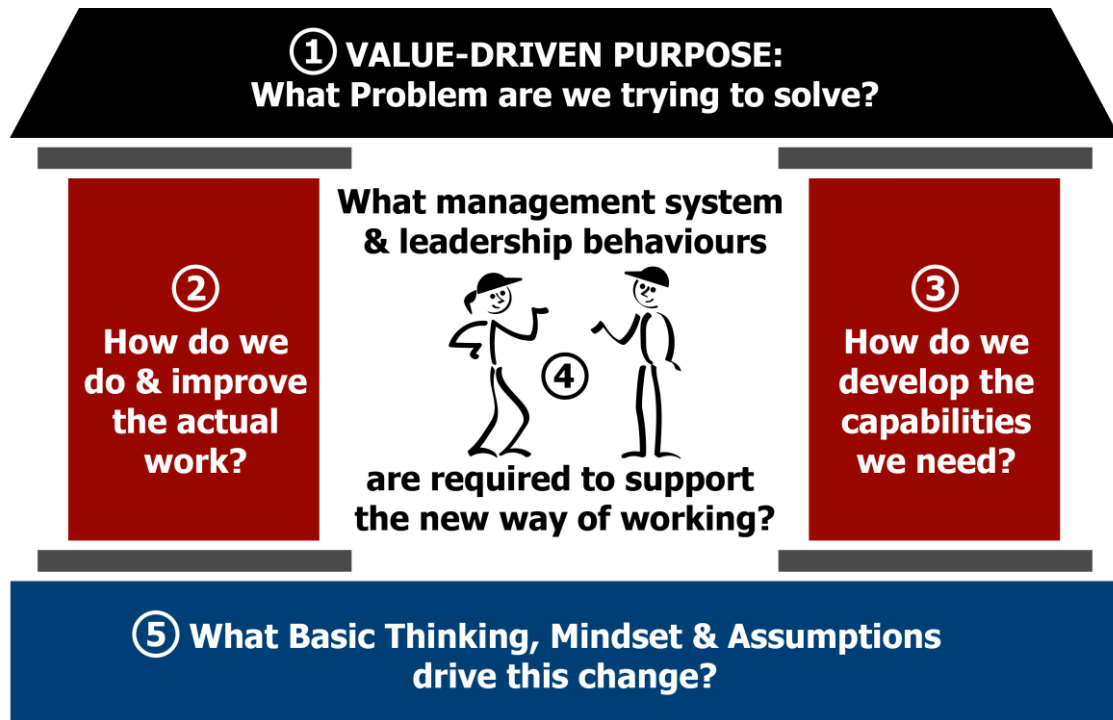
LEARN

TEACH & COACH

SHARE

# Developing your Lean Journey

The **Lean Transformation Framework (LTF)** helps align organisational purpose to create more value for customers, whilst developing people at the same time. Organised around five dimensions, questions on each area help determine the best lean journey for your situation. The starting point is to ask “What problem are we trying to solve?”



We have organised our learning materials and learning processes around the Lean Transformation Framework. We think you will find it makes learning lean practical and accessible.

To understand how we can support you on your **Lean Learning Journey** visit our website [www.leanuk.org](http://www.leanuk.org). We have a range of products and services that you and your organisation can use to become self reliant at Lean thinking and practice.



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# Lean Enterprise Academy

Congratulations and thank you for purchasing and/or downloading this material from the Lean Enterprise Academy.

At the Lean Enterprise Academy we help our customers develop their capability by providing products and support using three core processes: Learn, Teach & Coach and Share. We know from practical application that skill/capability development is best described as a journey. Therefore we have developed a guided learning path called the Lean Learning Journey.

The Lean Learning Journey process is based around Four Skill Levels; Knowledge, Understanding, Capable and finally, Can Do Well and Teach & Coach Others. Our aim is for you to become self reliant on your Lean Learning Journey so that you can share your learning, develop others in your team/organisation and become effective learners for life.



To align with our customer needs we launched the Lean Learning Platform on our website in late 2020. The platform includes a selection of guided learning courses and materials available so you can develop your skills throughout your Lean Learning Journey.

Thank you for being a part of the Lean Enterprise Academy and good luck on your Lean Learning Journey!

Best wishes,

Dave Brunt

CEO, Lean Enterprise Academy

# How to use this Facilitation Guide

## Format

Each graphic/image from the Teach Poster has been taken and broken down in to three elements:

1. Important Steps
2. Key Points
3. Reasons

Those of you familiar with the Training Within Industry (TWI) methods will recognise these elements from Job Instruction.

The **Important Steps** are the logical steps required in order to advance understanding of the subject and therefore need to be explained.

The **Key Points** are to ensure understanding of the Important Steps. Think of them as the special pieces of information which you need to impart to your team to really get them to understand what you are trying to say.

Finally, the **Reasons** are an explanation of why these steps and points are necessary.

## Planning for Success

When explaining the Teach Poster we recommend that it is positioned in a quiet area, printed big enough to be visible to the group and with enough space for all of them to stand around and see it. Our experience has shown that groups of no more than twelve works best. As they will be standing be mindful of the time you intend to take to explain and discuss – about 20 minutes maximum is a good target. Breaking the teach sessions down is best (e.g. sections of the Teach Poster) followed by a group discussion or exercise to maintain engagement and provide variety to the activity. Have a flipchart(s) and pens available also for additional explanations and to capture comments.

## Engagement

The teach should not be a tell but an interactive experience for you and the team. Images have predominantly been used to stimulate thinking so use them to ask the group questions like “What do you think we are trying to show here with this image?” Eventually someone will be compelled to say something and engage in dialogue with you!

Having covered the key points another good question to ask is “Why do you think this is important?” This is a great way of checking their understanding as well.

# How to use this Facilitation Guide

## Facilitation Tips

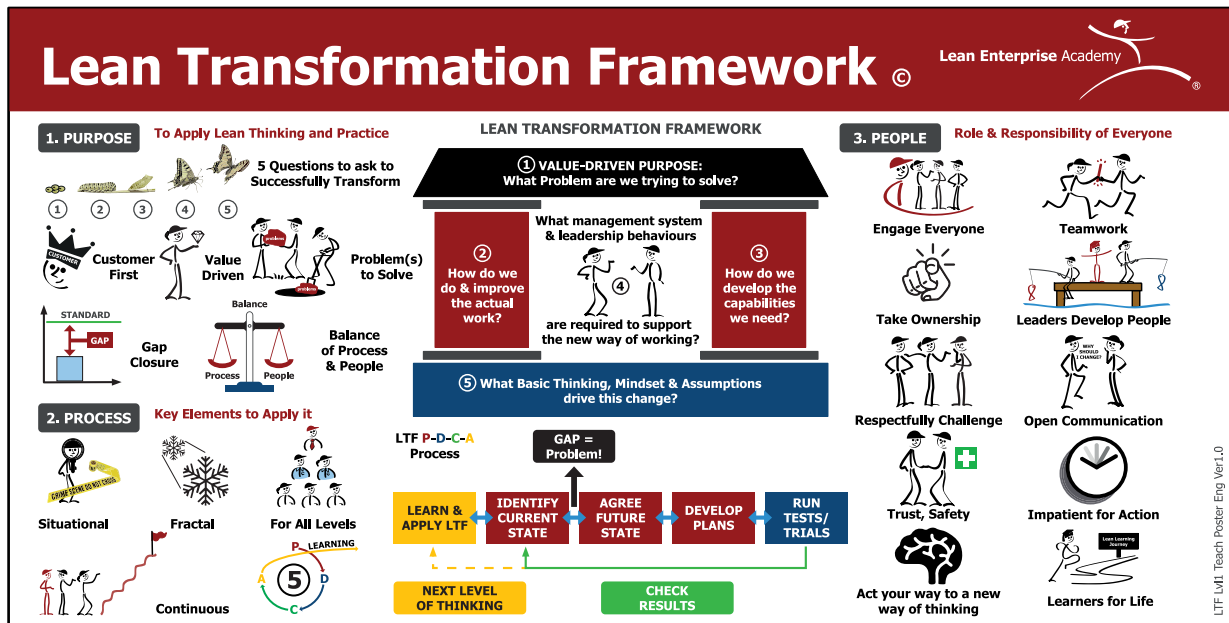
Although not exhaustive here are few tips to consider to help provide an engaging and interactive teaching session. Of course, we are sure you have your own stories and experiences that will embellish the learning journey so please feel free to use those to make the concepts relevant to your business environment.

## Some Facilitation Tools and Techniques:

- Use OPEN questions, not closed ones – “Tell me what you think this means?”.
- Ask ONE question at a time.
- Waiting 10 SECONDS for questions to be answered.
- REINFORCING contributions – verbally and non-verbally.
- DEFERRING to the group – “What do you think?”.
- MAINTAINING and ENHANCING self-esteem; “Good answer, thank you!”.
- POLLING or voting – “Hands up who has...”.
- BACKING OFF: getting the group to discuss without using the facilitator.
- ASKING the group to SUMMARISE.
- RECALL individual’s points and REFER back to them.
- LINK workshop/material to business, departmental or individual topics.
- Use IMPACTORS: vivid language, link to topical/current issues etc.
- Use VARIETY of pace, tone, position, activities etc.
- Use HUMOUR and HUMILITY.



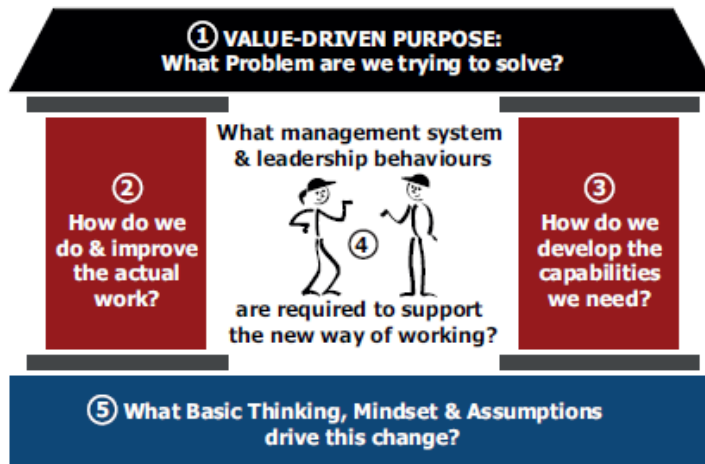
# Teach Poster and the LTF



Important Steps	Key Points	Reasons
<p>Why do we use a poster?</p> <p>Explain how the poster flows and works.</p>	<ul style="list-style-type: none"> <li>• It is visual, easy to read, interactive &amp; promotes discussion. Easier to translate (ask audience for other reasons).</li> <li>• The upper section relates to the Lean Transformation Framework (LTF) in terms of Purpose, Process and People.</li> <li>• It always starts with the LTF and normally ask which of the five questions the topic of the teach poster helps us to answer.</li> <li>• As this teach poster is about the LTF, it is all five!</li> <li>• The lower section provides more detail in terms of the five questions or dimensions that the LTF poses.</li> <li>• Start in the centre and then work outwards in terms of the subject, question to answer and the detail/thinking behind them.</li> </ul>	<ul style="list-style-type: none"> <li>• So leaders can use the poster to become the teachers of others.</li> <li>• Poster is much simpler than a 100 page PowerPoint presentation.</li> <li>• Can display the poster in the workplace, keep in your folder. Not hidden on a PC somewhere.</li> <li>• Images tend to be remembered better than words.</li> </ul>

# Teach Poster and the LTF

## LEAN TRANSFORMATION FRAMEWORK



Important Steps	Key Points	Reasons
What is Lean?	<ul style="list-style-type: none"> <li>• Ask: What is Lean?</li> <li>• Rooted in <b>Purpose, Process</b> and respect for <b>People, Lean</b> is about providing the most <b>Value</b> for the <b>Customer</b> whilst minimising resources, time, energy and effort.</li> <li>• The Lean Transformation Framework (LTF) helps to determine the best lean journey for your situation.</li> </ul>	<ul style="list-style-type: none"> <li>• Alignment of understanding.</li> </ul>
Start with the Lean Transformation Framework (LTF).	<ul style="list-style-type: none"> <li>• The LTF consists of 5 dimensions which can be asked as a series of questions in order to make a successful transformation.</li> <li>• The deeper thinking and meaning behind each question is covered in the lower section of the poster.</li> <li>• Review each question at a high level.</li> </ul>	<ul style="list-style-type: none"> <li>• Through the 5 dimensions and questions, the LTF tries to address some of the common failures experienced when trying to make a change or transformation.</li> <li>• It's important to ask and answer each one in order to maintain a balanced approach to the change you are planning to make.</li> </ul>



# Teach Poster and the LTF

## LEAN TRANSFORMATION FRAMEWORK



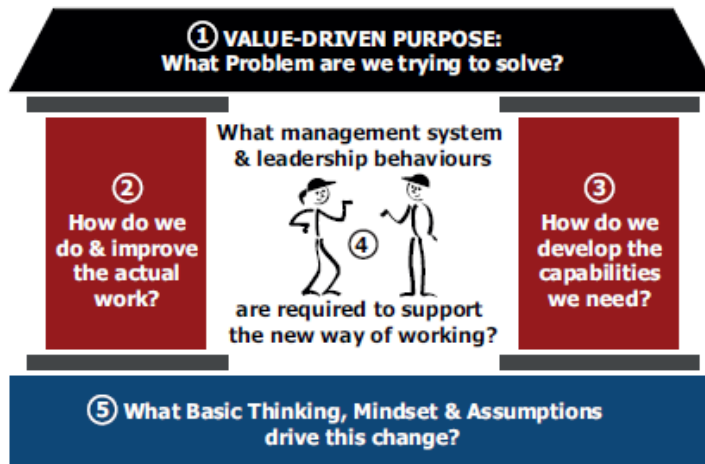
Facilitation through questions



Important Steps	Key Points	Reasons
<p>Question 1 asks: What Problem are we trying to solve?</p> <p>In relation to achieving your value driven purpose.</p>	<ul style="list-style-type: none"> <li>• Lean always starts with the customer. Asking what value do we need to provide depending upon the purpose of the organisation.</li> <li>• The question "What problem are we trying to solve?" is fractal, like a snowflake – whatever level you look at it, it looks the same.</li> <li>• It applies equally to a whole organisation, a team or an individual.</li> <li>• Does the organisation have a clear purpose?</li> <li>• Do individuals have clear line of sight to it and understand their contribution to that purpose and what problems they should be tackling to meet that purpose?</li> </ul>	<ul style="list-style-type: none"> <li>• Apply Lean Thinking &amp; Practice correctly to your unique situation.</li> <li>• Because lean is a way of solving problems, whilst developing everyone in the organisation, to provide better value for customers and society.</li> </ul>

# Teach Poster and the LTF

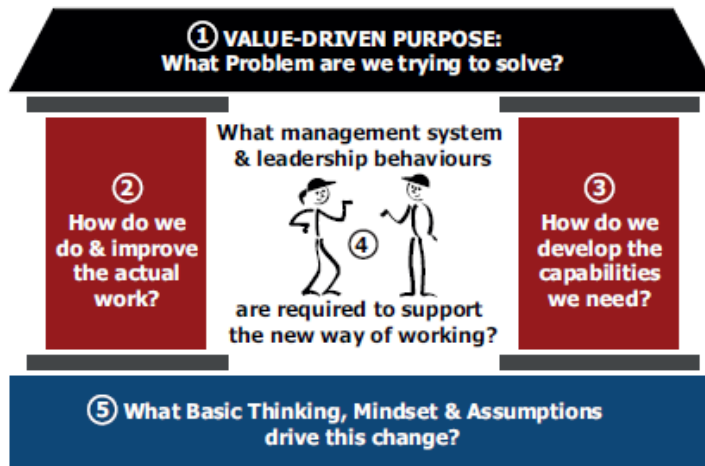
## LEAN TRANSFORMATION FRAMEWORK



Important Steps	Key Points	Reasons
<p>Question 2 asks: How do we do &amp; improve the actual work?</p>	<ul style="list-style-type: none"> <li>• What changes in the work need to be made to solve the problem?</li> <li>• This is also fractal - from individual work level to a value stream or enterprise value stream level.</li> <li>• Is the current state of the work today captured and understood?</li> <li>• Has the current state of work been analysed for waste and problems?</li> <li>• Has the future state been defined? What steps and experiments are needed to close the gaps between current and the future state of the work?</li> </ul>	<ul style="list-style-type: none"> <li>• To apply Lean Thinking &amp; Practice correctly to the unique situation.</li> <li>• To provide value some work must be done.</li> <li>• Capture the current state because this is how things are done today.</li> <li>• Identify the gaps (problems) in the work and determine how to close them in the future state.</li> </ul>

# Teach Poster and the LTF

## LEAN TRANSFORMATION FRAMEWORK



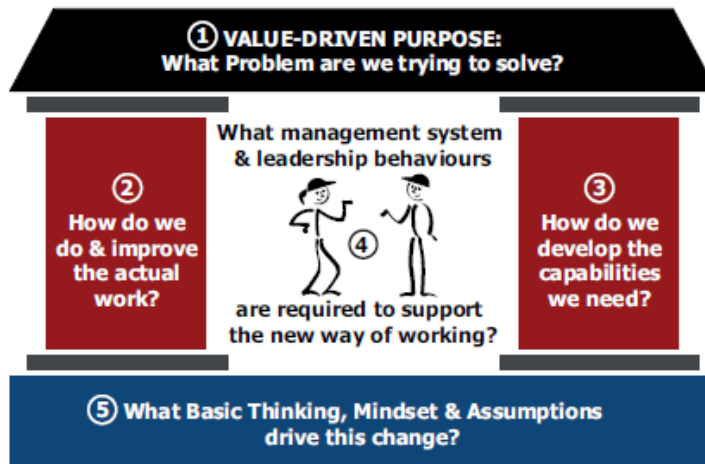
Facilitation through questions



Important Steps	Key Points	Reasons
<p>Questions 3 asks: How do we develop the capabilities we need?</p>	<ul style="list-style-type: none"> <li>• Having defined the work to be done, we now ask how do we develop the capabilities we need to do and improve the work to provide the value?</li> <li>• Capability development is needed on two aspects:</li> <li>• Capability to do the work and capability to improve the work.</li> <li>• Do people have the necessary capabilities?</li> <li>• Does the organisation itself have the required capabilities?</li> <li>• Have they been defined?</li> <li>• What is your approach to capability development?</li> </ul>	<ul style="list-style-type: none"> <li>• To apply Lean Thinking &amp; Practice correctly to the unique situation.</li> <li>• Organisational and individual capabilities are needed to do the work or new work in the future.</li> <li>• If they are not defined they cannot be developed nor can they be used to provide value for the customer.</li> </ul>

# Teach Poster and the LTF

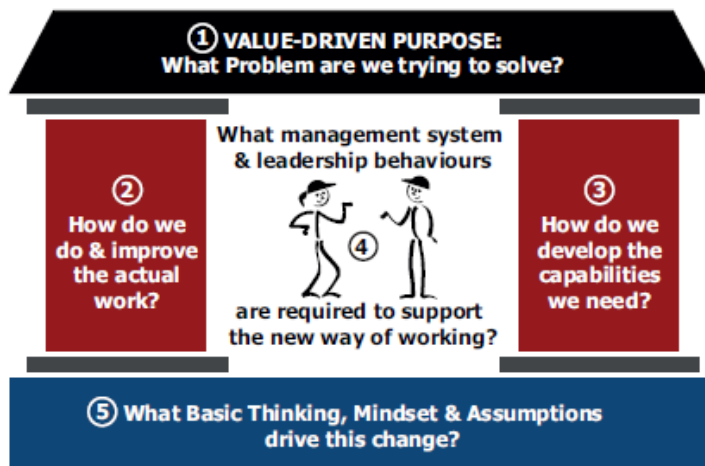
## LEAN TRANSFORMATION FRAMEWORK



Important Steps	Key Points	Reasons
<p>Question 4 asks: What management system &amp; leadership behaviours are required to support the new way of working?</p>	<ul style="list-style-type: none"> <li>• The design of the management system activities and the leadership behaviours are needed to ensure stability and make sustainable changes in the work.</li> <li>• They are also intrinsic to leaders supporting people in sustaining progress and making further improvement through PDCA.</li> <li>• Is the performance system designed to ensure daily work activities and their outcomes are checked, maintained and problem solved back to standard?</li> <li>• Is the improvement management system designed to visualise, organise and prioritise activities to achieve the medium to long term goals &amp; objectives?</li> <li>• Do leaders exhibit the required behaviors?</li> <li>• Leadership behaviours may need to change/flex to support the changes until they are embedded as the normal way of working.</li> </ul>	<ul style="list-style-type: none"> <li>• To apply Lean Thinking &amp; Practice correctly to the unique situation.</li> <li>• Without a management system for performance and improvement any changes will not be sustained.</li> <li>• They need to develop capability to do the work, to solve the problems, to achieve the value driven purpose.</li> </ul>

# Teach Poster and the LTF

## LEAN TRANSFORMATION FRAMEWORK



Facilitation through questions

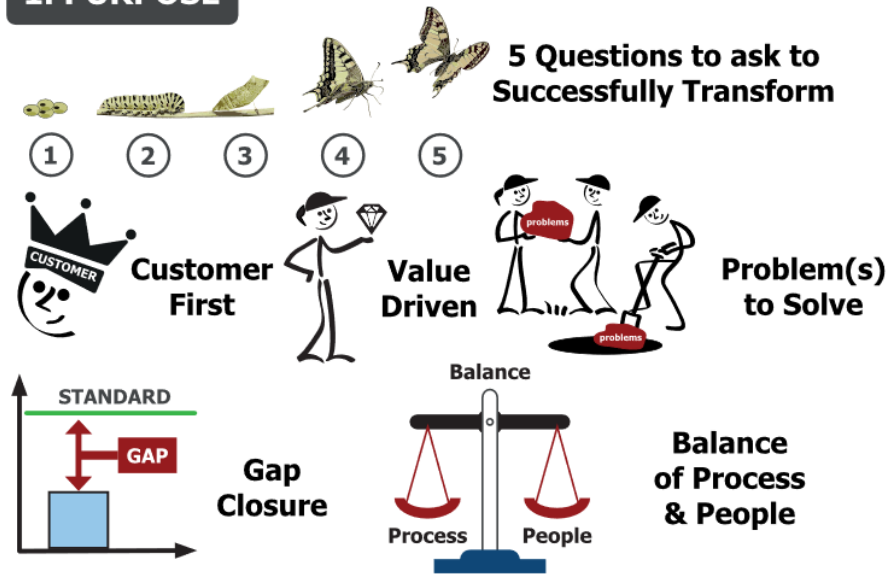


Important Steps	Key Points	Reasons
<p>Question 5 asks: What Basic Thinking, Mindset &amp; Assumptions drive this change?</p>	<ul style="list-style-type: none"> <li>• The final question challenges the basic thinking or assumptions regarding how activities are approached and how people conduct themselves.</li> <li>• Is the current basic thinking understood (mindsets, assumptions, as well as values)? What is the normal "modus operandi" for people in the organization and what impact does this have on the culture?</li> <li>• What needs to change in the basic thinking (and culture) of the people to make the transformation successful?</li> <li>• What is the GAP on where the culture is today versus where it needs to be?</li> </ul>	<ul style="list-style-type: none"> <li>• With Lean Thinking "it is easier to act your way into a new way of thinking, than think your way into a new way of acting."</li> <li>• The more progress made with applying lean thinking and practice using the 5 questions the more the culture will change as an outcome.</li> </ul>



# 1.0 Purpose

## 1. PURPOSE To Apply Lean Thinking and Practice



Important Steps	Key Points	Reasons
<p>Start with 1.0 Purpose.</p> <p>What is the Purpose of the Lean Transformation Framework.</p>	<ul style="list-style-type: none"> <li>The LTF is a framework to help people think about how to manage change using Lean Thinking and Practice.</li> <li>To apply Lean Thinking and Practice to any situation, not just manufacturing environments, but for all types of organisations.</li> <li>It does this by asking 5 questions in order to successfully transform as shown by the caterpillar to butterfly graphic.</li> <li>There are a number of principles behind this thinking:</li> <li><b>Customer First</b> approach - whether that be the final customer or the next step in the process we need to make sure we completely understand their requirements and ensure we meet them, as a minimum.</li> </ul>	<ul style="list-style-type: none"> <li>To be aware of potential failure modes when undertaking this activity and address them.</li> <li>Lean always starts with the customer. Need to know and understand who the customers are and what they value and want.</li> </ul>

# 1.0 Purpose

## 1. PURPOSE To Apply Lean Thinking and Practice



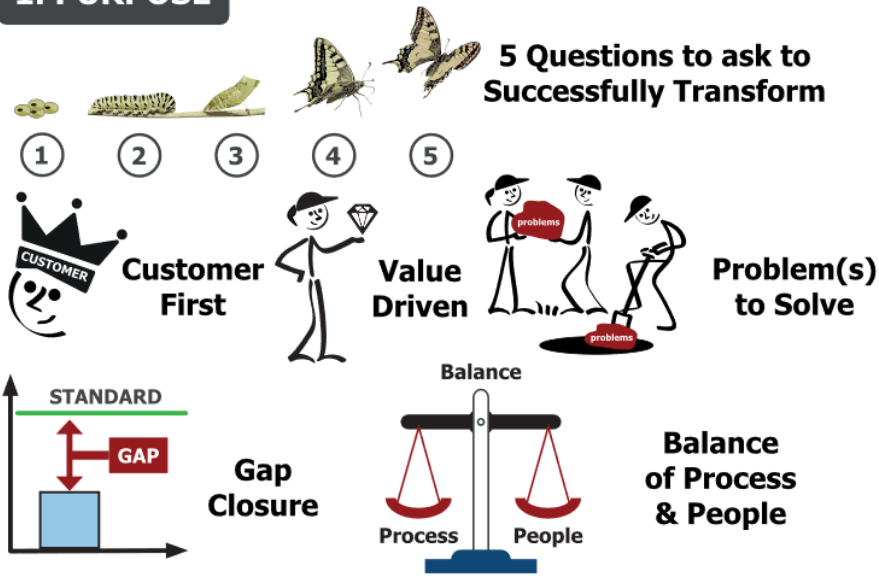
Important Steps	Key Points	Reasons
<p>Start with 1.0 Purpose.</p> <p>What is the Purpose of the Lean Transformation Framework.</p>	<ul style="list-style-type: none"> <li>• <b>Value Driven</b> purpose – with respect to fulfilling the customer, how do we provide value with the activities or work that we do at an individual level through to the organisation or enterprise.</li> <li>• <b>Problems(s) to Solve</b> – By understanding our Customer needs and Value Driven purpose we next need to think about what problems are we trying to solve? Again these are problems at an individual level through to those at an organisational level. Problems are good remember! Like golden nuggets waiting to be dug up &amp; discovered.</li> </ul>	<ul style="list-style-type: none"> <li>• To achieve a successful change or transformation aligned to the organisation's needs.</li> <li>• To make sure people are solving the "right" problems at their level aligned to the value driven purpose.</li> </ul>



# 1.0 Purpose

## 1. PURPOSE

To Apply Lean Thinking and Practice

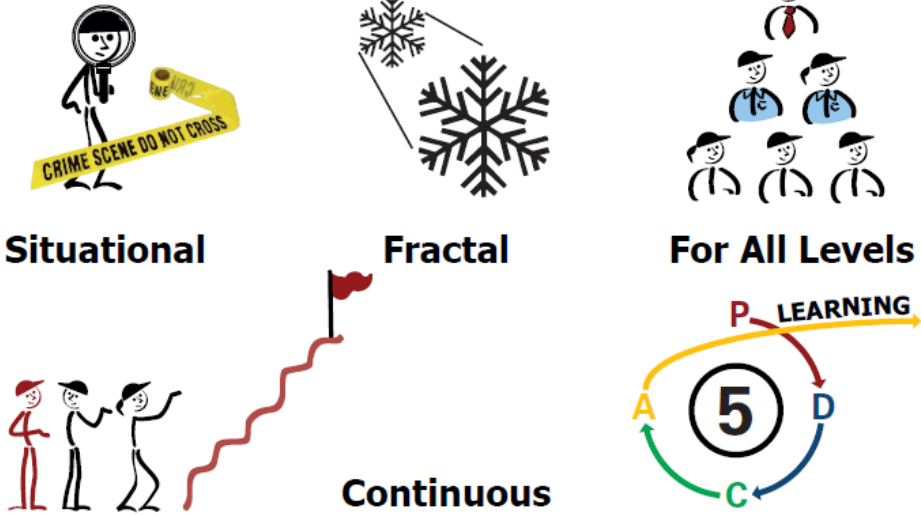


Important Steps	Key Points	Reasons
<p>Start with 1.0 Purpose.</p> <p>What is the Purpose of the Lean Transformation Framework.</p>	<ul style="list-style-type: none"> <li>• <b>Gap Closure</b> – Lean likes to view problems as Gaps, something that is measurable.</li> <li>• <b>Balance of Process &amp; People</b> – Some organisations focus heavily on the process side of change and improvement e.g. using and deploying Lean tools like 5S, Standardised Work, Value Stream Mapping etc. Some organisations focus heavily on People Development e.g. Training, Certifications, creating Experts etc. However, experience tells us that it needs to be a balanced approach of both and indeed all of the 5 Dimensions of the LTF, as indicated by the different colours of the scale.</li> </ul>	<ul style="list-style-type: none"> <li>• If you can't measure it, then you can't improve it.</li> <li>• Make sure that we prioritise the right things aligned to the purpose.</li> <li>• Ensure a balanced approach and avoid common failure modes.</li> </ul>

# 2.0 Process

## 2. PROCESS

### Key Elements to Apply it

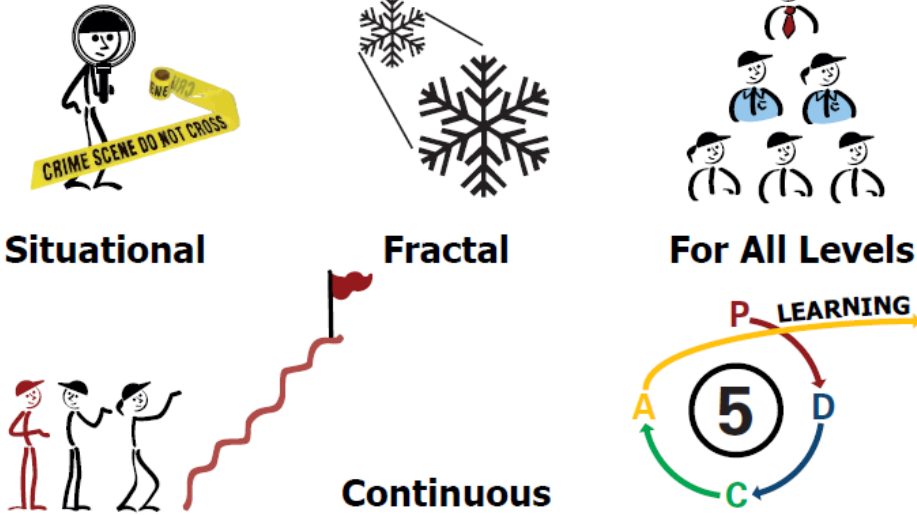


Important Steps	Key Points	Reasons
<p>2.0 Process.</p> <p>What are the Key Elements when applying the LTF.</p>	<ul style="list-style-type: none"> <li>• <b>Situational</b> – Every Situation is unique &amp; different and hence when applying the LTF the Situation needs to be understood. The best way to do this is to go, see and study for yourself. The Japanese phrase for this is “genchi genbutsu”. This is represented by the leaper and CSI tape going to investigate the actual place/thing or crime scene in this case. Often the word “gemba” is used aswell which means actual place.</li> <li>• <b>Fractal</b> – Like a snowflake, the LTF is fractal in that it looks the same whatever level of magnification chosen. It is the same set of questions that need to be asked.</li> </ul>	<ul style="list-style-type: none"> <li>• Applying a standard approach/program or set of tools will fail unless the situation has been thoroughly understood first, and the activities adjusted to suit the needs.</li> <li>• To develop a consistent lean thinking way throughout the organisation.</li> </ul>

# 2.0 Process

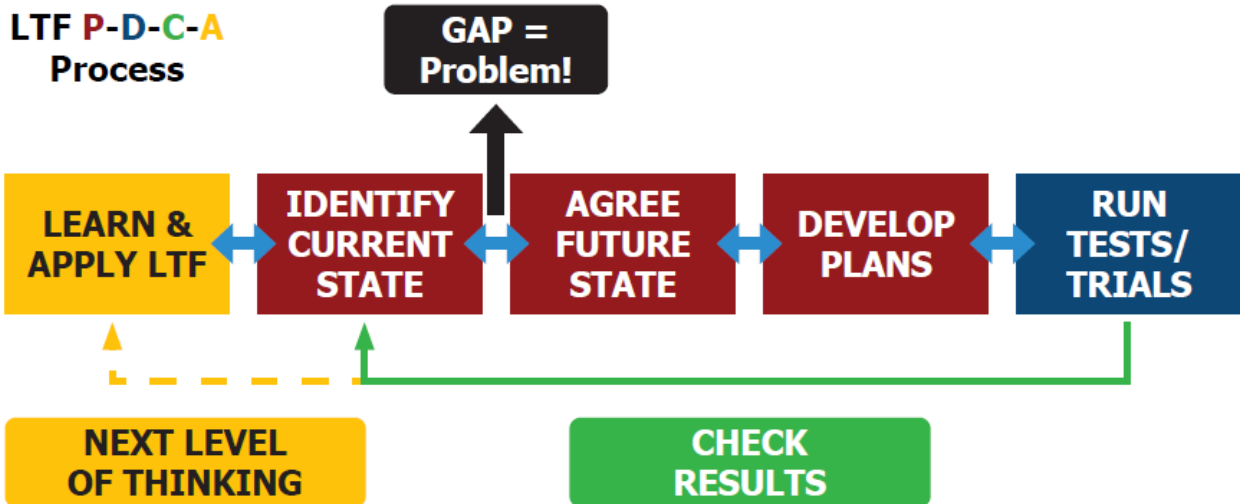
## 2. PROCESS

### Key Elements to Apply it



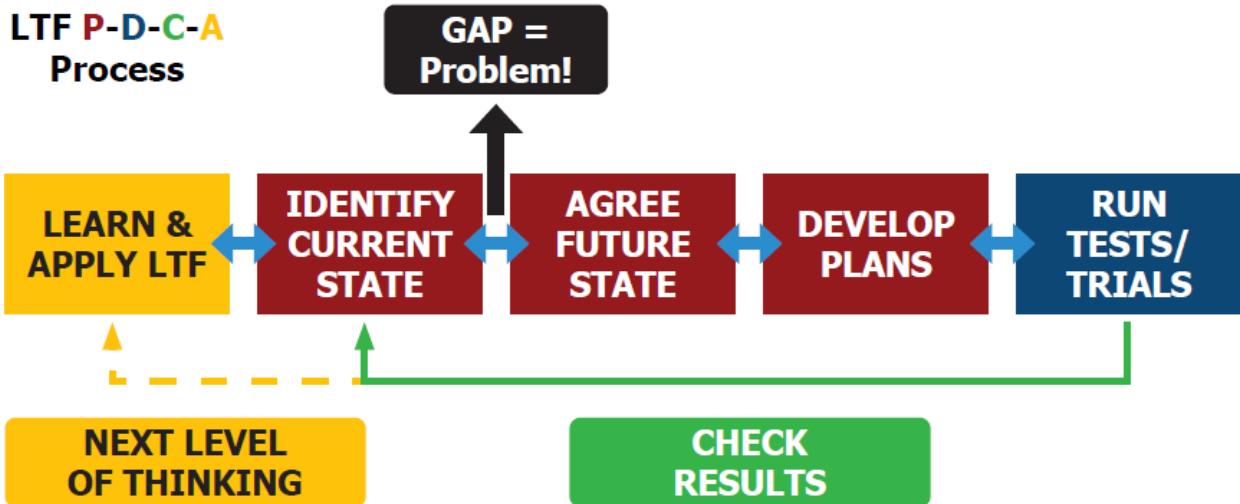
Important Steps	Key Points	Reasons
<p>2.0 Process.</p> <p>What are the Key Elements when applying the LTF.</p>	<ul style="list-style-type: none"> <li>• <b>For All Levels</b> – Following on from its fractal nature, the LTF questions are applicable for every level of the organisation when considering to make a change or transformation. From those doing their individual work task through to Senior Executives considering organisational changes and improvements.</li> <li>• <b>Continuous</b> – Change/ Transformation is never done! There will always be the next problem to solve towards achieving your Goal.</li> <li>• <b>PDCA</b> - Relentless application of Plan, Do, Check, Act (PDCA) using the 5 questions.</li> </ul>	<ul style="list-style-type: none"> <li>• Applies to every level of the organisation.</li> <li>• The situation can change. The more improvement is done, the more opportunities to improve become apparent.</li> <li>• Reflecting and Learning from each PDCA cycle to make the next one even better!</li> </ul>

# 2.0 Process



Important Steps	Key Points	Reasons
<p>2.0 Process.</p> <p>LTF PDCA Process.</p>	<ul style="list-style-type: none"> <li>• This is the high level process for applying the LTF to Situational Changes/Transformations.</li> <li>• The colour of the boxes relate back to PDCA.</li> <li>• Firstly, Learn about the LTF and start to Apply it.</li> <li>• Secondly, Identify the Current State or starting point.</li> <li>• The double headed arrows indicate toggling between the boxes. For example, as the Current State is established so is Learning more about the LTF. The two are symbiotic.</li> <li>• Unfortunately it isn't a one way street!</li> <li>• Next, is to develop and Agree the Future State. The outcome of this will be problems or gaps that will need to be addressed and closed in order to achieve the Future State.</li> </ul>	<ul style="list-style-type: none"> <li>• To learn what works and what doesn't work in your unique situation.</li> <li>• Reflecting and Learning from each PDCA cycle to make the next one even better.</li> </ul>

# 2.0 Process



Important Steps	Key Points	Reasons
<p>2.0 Process.</p> <p>LTF PDCA Process.</p>	<ul style="list-style-type: none"> <li>• To close those gaps and achieve the Future State requires planning in terms of what needs to be done – Develop Plans.</li> <li>• The outcome of the planning will be a series of experiments or tests to be run/done.</li> <li>• From the experiments, the results need to be checked and fed back in to the Current State. Confirming that the problem/gap has been closed and enabled progress towards the Future State.</li> <li>• The last step is to apply your Next Level of Thinking after reflecting on what you learned from the LTF process.</li> <li>• This enables a better level of thinking and application of the LTF and the questions next time round.</li> </ul>	<ul style="list-style-type: none"> <li>• To learn what works and what doesn't work in your unique situation.</li> <li>• Reflecting and Learning from each PDCA cycle to make the next one even better.</li> </ul>

# 3.0 People

## 3. PEOPLE

### Role & Responsibility of Everyone



**Engage Everyone**



**Teamwork**



**Take Ownership**



**Leaders Develop People**

Important Steps	Key Points	Reasons
<p>3.0 People. Role &amp; Responsibility of Everyone.</p>	<ul style="list-style-type: none"> <li>• These are some of the key behaviours everyone needs to adopt when applying the LTF and making the changes/transformation.</li> <li>• Engage Everyone in the activities. Top down to bottom up everyone needs to be committed to solving problems with the work to achieve the value driven purpose.</li> <li>• Structured Teamwork. <b>Together Everyone Achieves More.</b> Respectfully refer to people as Team Members, not workers, employees etc.</li> <li>• Take Ownership for the Actions that need to be taken. This is required for good teamworking.</li> <li>• Leaders Develop their People to do and improve the work. Teach, Coach, Recognise and Constructively Feedback.</li> </ul>	<ul style="list-style-type: none"> <li>• To avoid some of the common failure modes.</li> <li>• Lean is inclusive not exclusive in its approach – not just for experts. Everyone needs to be involved &amp; contribute.</li> <li>• It cannot be done alone and in isolation. Everyone needs to pull together as a team. This supports engagement aswell.</li> <li>• Do not rely or wait for other people to do. What can you do? Be accountable for your performance and contribution.</li> <li>• Servant Leadership style for sustainable change. Helps to create the desired culture.</li> </ul>

# 3.0 People



Respectfully Challenge



Open Communication



Trust, Safety



Impatient for Action



Act your way to a new way of thinking



Learners for Life

Important Steps	Key Points	Reasons
<p>3.0 People.</p> <p>Role &amp; Responsibility of Everyone.</p>	<ul style="list-style-type: none"> <li>• Be Respectful when Challenging each other. Making change will challenge the way we do things today.</li> <li>• Promote Open and Honest Communication.</li> <li>• Build Trust and provide a Safe working environment, both physically and mentally.</li> <li>• Be Impatient for Action. Not too fast, not too slow. Progress vs Perfection.</li> <li>• Act your way to a new way of thinking. Rather than think your way to a new way of acting. Learn by Doing.</li> <li>• Learners for Life – having the humility to accept there is always a better way. Despite whatever level of expertise you may think you have achieved.</li> </ul>	<ul style="list-style-type: none"> <li>• Respect opinions, but use facts and data to clarify.</li> <li>• E.g. take the time to explain to explain Why change needs to happen.</li> <li>• Its OK to fail so long as we learn from our mistakes for example. Not everything will work the first time.</li> <li>• Too fast and it will not be sustained. Too slow, momentum will be lost.</li> <li>• Easier to change behaviours this way – by doing it, rather than demanding it.</li> <li>• Continuous improvement, every day is a school day.</li> </ul>

# Notes



# Notes

# Notes



# Lean Enterprise Academy



**We are a not for profit organisation, established to help customers become self-reliant on their lean journey. Through research, products and services we provide better, faster and cheaper ways to learn and improve. Our Senior Lean coaches have a combined total of over 70 years Lean experience and have worked with hundreds of companies across the globe.**

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