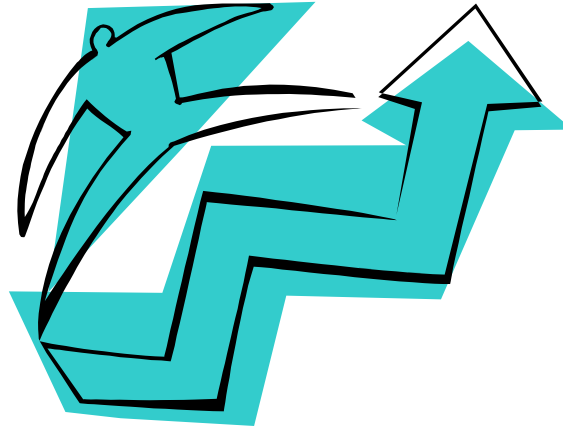


Methods for Improvement Consultants



by Joe Kilbride

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Version 05.30.2015

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Published in the United States of America by Kilbride Consulting, Inc.,
1115 Grove St. Downers Grove, IL 60515

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Acknowledgements

As a product of over 30 years of consulting engagements, many have contributed to this book, either directly or indirectly, through the edification of its author.

Don Jacklich was responsible for my entry into the field of consulting. He created an indelible image of what it means to produce “good” methods and effective instruction.

Chuck Leber, who passed away in 2014, was one of my first clients, and many of the methods are the result of our collaborations developing training and facilitating teams.

Dan Cochran provided many opportunities to work with and learn from a variety of improvement teams. Dan is also responsible for my initial involvement with the Baldrige Criteria and Illinois Performance Excellence (ILPEX).

Mark Blazey and Joe Sener were my first teachers of the Baldrige Criteria in 1995. In the years since, I have had the opportunity to work with and learn from clients, my fellow ILPEX judges and hundreds of examiners.

Jeff Chan has been a friend, client, and collaborator for many years. As a client, Jeff was the first to see the potential for using the methods to design a [learning + doing intervention](#). As a consultant, we have worked together many times using these methods to help organizations effectively manage major change.

Pat Ruzich encouraged my exploration of systems thinking, which continues to inform my approach to all client engagements.

Derek Regal helped me begin to see the methods as a way to upgrade the [thinking processes](#) of managers. John Lingle and Bill Schiemann of the Metrus Group influenced my thinking about scorecard development.

Debbie Stock and Ed Valentine were the first to recognize the potential for using the methods as [building blocks](#) for development of effective instruction to build management competencies within management and leadership development programs.

Many clients and friends have been advocates and/or users of the methods and helped to expand my thinking in terms of their application. This includes Craig Thompson, Kathy Goerd, Pattie Skriba, Susan Harper, Kent Carson, Russ Scalpone, Ron Carlson, Don Tornberg, Dennis Kripp, Kim Colburn, Mike Sessions, Art Chmelik, Keith Johnson, Anil Saxena, Charlie Guild, Mary Pepperl, Anita Moore, David Cook, Karen Tulloch and many others.

Some of my best learning has come from clients like Dr. Bill Gorski and Tom Myers, Louis Kosiba and Dan Duquette, and many others who have provided me opportunities to work with their organization in the application of these methods for improvement.

Throughout the book you will find references to other authors and practitioners whose work has informed my thinking. Whenever possible, I attempted to provide a reference for those interested in other resources related to the use of these methods.

My biggest debt of gratitude is to my wife, Joanie, who has been a trusted friend, confidante, colleague and supporter of my work for 30 years.

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Introduction to the Methods

For those whose job is to make things better

For thousands of years skilled tradesmen have been making things for a living. Whether you were a carpenter, iron worker, potter, or mason, at the end of the day you had... made... some... thing.

Today, very few of us make things. The advent of large organizations and the shift from a manufacturing to service economy has led to increasing numbers of people whose work has nothing to do with making things. Instead, many of us work with others to make things better. This might involve improving the quality of products or outcomes, improving the delivery of services to customers, or improving the efficiency and effectiveness of an organization's work processes. In each case the aim is improvement, i.e., to make things better.

Many of us who do this type of work are consultants of one kind or another and increasingly we are external to the organizations we serve. Like tradesmen in the past, we travel from one organization to another, helping clients make plans, make decisions or make solutions. Our material is not wood or brick or steel, but ideas and information. And rather than carrying a toolbox, we rely upon the expertise we have developed over time.

“Tools-of-the-trade” for Improvement Consultants

This book is intended to document many of the “tools-of-the-trade” used by improvement consultants. It is comprehensive (88 methods in seven chapters), but not complete. It was developed in the late 1990s and early 2000s to document the approaches I was using with

clients at the time. The careful reader will note that some of the examples reflect this timing. It is intended as a resource for those who work through others to make improvements. This includes the lean facilitator or six sigma black belt, quality or process improvement consultant, organizational effectiveness or management consultant, strategic planner, project manager, change agent, team leader, supervisor or manager.

Why are they called Methods?

Many people refer to the methods that are the subject of this book as “tools”. But that term better fits the world of things. Method is a better description of the approaches used by those who work with ideas and information.

The following definition of method provides an accurate description of the content of this book. It provides step-by-step, systematic procedures for consultants who work with others to make improvements, i.e., Methods.

meth-od (mĕth'əd)

1. A means or manner of procedure, especially a regular and systematic way of accomplishing something
2. Orderly arrangement of parts or steps to accomplish an end
3. The procedures and techniques characteristic of a particular discipline or field of knowledge



There are other ways to use these methods

Most of the methods in this book are well known and have been widely used for decades. This book is intended to provide a comprehensive resource with step-by-step

instructions. It does not intend to be the definitive guide or to present the “best” way to use these methods. Many will have their own wrinkles on the use of these methods and some will be improvements over what is presented here. This resource errs on the side of providing clear instruction for how to apply each method, but does so knowing there are other ways that are equally effective.

The Thinking Process

Even if you never use one of the methods formally with a client, you (and your clients) can learn much from a study of them. Embedded within these methods are thinking processes that have practical value and wide applicability.

I am not certain, but believe it was Buckminster Fuller who once said (paraphrasing)...

“Don’t teach me new ways of thinking. Give me tools that make me think in new ways.”

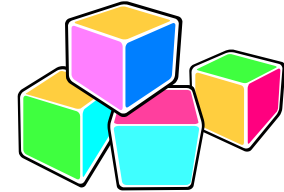


One can study a method to learn the thinking process embedded within it. Even if you never formally use the methods in the step-by-step manner they are presented, appropriate use of the thinking processes they contain has wide applicability and benefit.

One of their best uses in this regard is in a training context. The methods can be used as a way to provide instruction and opportunities for application of rigorous and effective thinking processes for planning, creativity, decision making, problem solving and process improvement.

Reusable Learning Objects

If you are a consultant who designs and delivers training, the methods can be viewed as “building blocks” for the development of effective instruction. It is often possible to pull several methods together into a sequence to accomplish a training objective and to do so in relatively short order.



As a result, the methods can significantly reduce the time to develop training. More importantly, the step-by-step nature of the methods can provide opportunities teach and apply what might be considered rather abstract thinking processes. They can provide opportunities for practical application of the types of knowledge and skills that are often the focus of [management or executive development programs](#) in many organizations. Many organizations offer courses that aim to develop competencies in a variety of areas that are addressed by the methods such as:

- Innovation/creativity
- Decision making
- Delegation
- Teamwork and collaboration
- Problem solving
- Customer focus
- Process excellence
- Setting goals
- Planning and organizing
- Vision and strategy
- Collection, review and analysis of data
- Managing change
- Managing conflict
- Managing meetings
- Listening skills
- Project management
- Dealing with risk and uncertainty

Facilitating Competence

Methods serve both new and experienced consultants.

- ◆ *Novice* – The step-by-step nature of the methods provide the novice with the detail needed to perform at a level of conscious competence. The methods provide enough guidance to allow even inexperienced consultants to achieve successful outcomes.
- ◆ *Expert* – Experienced consultants will find at least a few new methods here or interesting wrinkles on familiar ones. In addition, they provide a valuable refresher prior to use that enables the expert to recall the unconscious competence that is characteristic of those who have internalized the thinking processes.

Love ‘em or hate ‘em

The formal use of methods often invokes one of two responses from clients. You will either be greeted with:

- ◆ *Credibility* – A formal approach lead some clients to (at least temporarily) believe you have expertise, deem you credible and give the approach a chance.
- ◆ *Skepticism* – Others dislike structure. Some clients will have prior experience with methods like these, which may not have been positive. Most cynics became that way as an intelligent response to past experience. Perhaps the methods were used badly, or for coercion, or perhaps the client was an advocate of the methods, only to see them fall from favor. Remember, most clients over the age of 29 have seen almost everything come... and go... at least once.

Every organization has a unique culture, and each has a different need and tolerance for methods like these. The methods can provide structure and rigor to enhance the quality of conversations and the thinking processes of managers and teams who are working to make improvements.

But they can be misused. Not every situation requires a method. Use the tools. Do not let the tools use you.

The aim of this book is to provide a resource that documents effective approaches; it does not endow one with expertise. As in the world of things, it is not the tool, but the skill of the tradesman using it that determines the quality of the output.

Using this Resource

How do I find the right method?



The book offers several means to help you determine when and how to use each method.

- ◆ *Chapters* – A hyperlinked [Table of Contents](#) groups the methods into chapters based on type. The title of each chapter is *Making _____*. This is a reminder that the methods are to be used in an active, constructive fashion to achieve the desired outcome for your client.
- ◆ *Chapter Introductions* – The introductory section in each chapter provides an overview and explanation of the types of methods, plus heuristics for determining when each method would be most appropriate.

- ◆ *When to Use Each Method* – Each chapter introduction includes a decision tree to clarify when each method might be used. Following are links to these pages:

[Chapter 1 – Methods for Making \(better\) Meetings](#)

[Chapter 2 – Methods for Making Sense \(clarifying issues\)](#)

[Chapter 3 – Methods for Making Plans](#)

[Chapter 4 – Methods for Making Ideas](#)

[Chapter 5 – Methods for Making Decisions](#)

[Chapter 6 – Methods for Making Improvements](#)

[Chapter 7 – Methods for Making Data/Measures](#)

How do I use each of the methods?

Once you find the right method for your situation, each one is explained in three parts:

- ◆ **What is it?** A brief description of the method and its use.
- ◆ **How do I use it?** Step-by-step instructions with *Hints*, *Warnings* and hyperlinked *Pointers* to other methods.
- ◆ An **example** and a blank **form** where appropriate.

How do I quickly access the methods?

- ◆ Each method can be directly accessed by clicking on the hyperlink in the [Table of Contents](#) on page 4.

To follow a hyperlink in this PDF file:

1. Find a blue hyperlink like the one below anywhere in this document or its [Table of Contents](#)
2. Use a touch pad or mouse to move your pointer over the hyperlink you want to access and a finger like the one shown at right will appear.
3. When the finger appears, click on the hyperlink to directly access it.

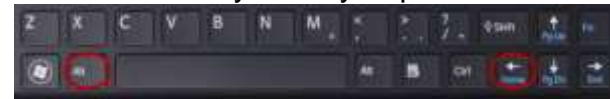


- ◆ From any page you can quickly return to the *Table of Contents* by clicking on the hyperlinked button at the top center of every page in the book.



- ◆ After you click a hyperlink, there are several methods you can use to return to the prior page:

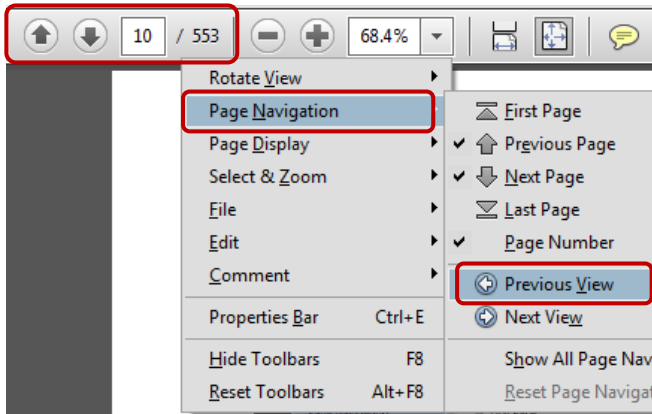
- **Alt-left arrow** If you are using Windows, hold down the Alt key while you press the left arrow



- **Command-left arrow** If using Mac, hold down the Command key and press the left arrow.



- ◆ The best approach is to add the **Previous View** button to your Adobe Reader toolbar. To do so:
 - Open the *Methods* in Adobe Reader and right click on the Page Navigation section of the toolbar.
 - Choose the Page Navigation menu item.
 - Choose Previous View. This will add the Previous View button to your Acrobat Reader toolbar.



- ◆ [Appendix](#) – The last section of this book provides an alphabetical listing of the methods with hyperlinks. If you cannot recall what chapter a method is in but remember the name, this is an easy way to find it.

The Appendix also describes several frameworks that might be used to sequence a subset of the methods into an improvement approach. This is a common practice in organizations seeking to deploy a standard approach for responding to problems or improving work processes. They define a continuous improvement approach and select a handful of methods that are recommended at each step of the process. Several examples of these types of frameworks are provided in the [Appendix](#).

Other products and services available

Licensing and Training for Managers and Teams

Customized versions of this resource can be licensed by organizations. This is often done to provide training on a subset of these methods to managers and teams as part of a leadership or management development curriculum that is designed to build specific [competencies](#). Instructor-led workshops and/or train-the-trainer content can also be provided to teach managers and teams in appropriate use of the methods and embedded thinking processes.

Improvement Interventions (Learning + Doing)

A highly effective intervention is to select a group of managers and assign each one a goal to improve a process that they operate. These managers attend a series of workshops with their intact teams during which they are taught a set of methods and directly apply them to the improvement goal they have been assigned. If properly managed, this can be a highly effective learning and improvement intervention.

Wallcharts

To enhance instruction and facilitation of the methods, 3 foot x 4 foot wallcharts are available for many of the methods that are typically used in group settings. Clients who license customized versions of this resource or contract for facilitated improvement interventions often find these wallcharts provide valuable support to the process.

Future Direction

This collection of methods has been under development for 30+ years, and will continue to be enhanced over time. Send examples, success stories, suggestions, etc. to Joe@KilbrideConsulting.com