LEADER STANDARD WORK

By Holly Zink

INTRODUCTION AND DISCLOSURES

- Research Project Development and Education Manager
 - Children's Mercy Hospital in Kansas City
- Associate Editor, Journal of Research Administration
 - Society for Research Administrators International
- Doctoral Student
 - PhD in Business Management, Strategy and Innovation
 - Capella University, School of Business
- Author
 - iDoGrants.org
- Mother and Wife
- Oh, and I have no disclosures.



EXPECTATIONS FOR YOU

- Explain that Leader Standard Work includes
 - "what" (timing, content, outcomes) and
 - "how" (coaching, problems solving, and accountability).
- Be prepared to put Leader Standard Work into practice.

OVERVIEW OF LEAN AND LEADER STANDARD WORK

THE LEAN MINDSET

• A LEAN organization

- understands customer value and
- focuses its key processes to continuously increase it.
- The ultimate goal is to
 - provide perfect value to the customer
 - through a perfect value creation process
 - that has zero waste.
- To accomplish this,
 - lean thinking changes the focus of management
 - to optimizing the flow of services through entire value streams
 - that flow horizontally across technologies and departments to customers.

THE LEAN MINDSET

- It is the way we...
 - Think and behave.
 - Lead and manage.
 - Improve performance.
 - **Build** a culture of safety and continuous improvement.
 - Deliver safe, reliable, timely work to our research teams.
 - Create a positive experience for our team members and organization.

THE LEAN MINDSET

- How to start?
 - Spend time with your job description.
 - Record what you do on a daily, weekly, monthly basis.
 - Reconcile your ongoing **commitments** with your calendar.
 - Begin defining your short- and long-term goals.
 - Define a list of the **obstacles** in your way to meeting those goals.

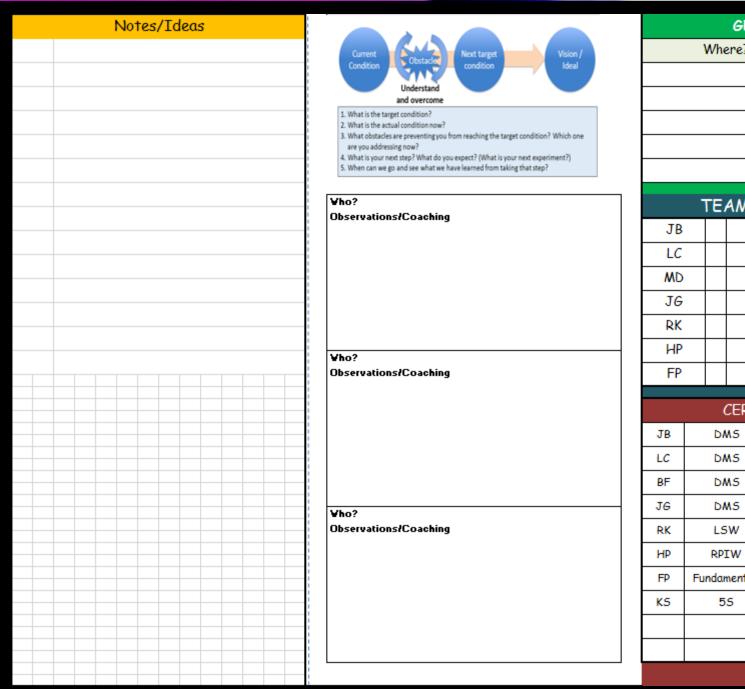
IMPORTANCE OF STANDARD WORK

- Provide a common understanding of the process—the right way to do the work.
- Improve **predictability** of results.
- Make abnormal vs. normal clear.
- The basis for continuous improvement.

LEADER STANDARD WORK

- Leader Standard Work is the regular cadence leaders follow
 - to develop people,
 - to improve processes, and
 - to improve leadership proficiency at all levels.
- It is the framework to
 - simply, easily, and visually
 - manage our business,
 - develop problem-solvers,
 - and improve performance.
- Here are a few examples to give you an idea of what Leader Standard Work sheets can look like.

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PLAN THE	DAY						My Memory Jogger	THE BOSS TOP BOALS
Kronos Inbox (PTO approvals)	м	Т	٧	Н	F	i		
Prioritize This Weeks Tasks	М	Т	٧	Н	F	1		
"Follow ups"	М	Т	٧	Н	F			
	М	Т	٧	Н	F	i		
	М	Т	٧	Н	F			
Review/Print tomorrow's schedule	м	Т	v	Н	F			MY TOP 3 FOR THE MONTH
	м	Т	v	Н	F			
Update LSW					F			
Review 8-wk Look Ahead			v			i		
Approval Travel Expenses		т						
Review Projects/Status				н				MY TOP 3 FOR THE WEEK
Prep next wks Ops Mtg. Agenda					F			
Empty Recycle Bin	м							
Approve Time Cards by 11:00	м					-		
Review Team LSWs					F	i		
Review Ambulatory MGT Agenda		т				i		ESCALATED ISSUES
				н				
Get boss' Top 5		т				i		
	J	F	м	Α	м			
Steering Committee Agenda	**	**		**	**			
Design Team		,	,	,	,			FUTURE ACTIONS
Q&S Council		2/9	3/#	**	**			
Guiding Coalition Agenda								
Staff Meeting		**		**	**			
Review Staff Dev. progress	н	,	U	н	F	1		



GEMBA WALKS									
Where?	M	Т	W	Н	F	WE			

TEAM LSW REVIEWS						
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LC						
WD						
JG						
RK						
HP						
FP						

CERTIFICATIONS							
JВ	DMS			55			
LC	DMS						
BF	DMS			55			
JG	DMS			55		-	
RK	LSW			RPIW			
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Review PI Project Inventory				Н		П	ш	VIEVPOINT PRJCTS				Bo	ss' Top	5			
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Q&S Council		2/9	3/#	**	**		1 What	and overcome is the target condition?				Perform Follow Up on "R	ed Conditio	Μ	Т	W	ŀ
Guiding Coalition Agenda			**				2. What	is the actual condition now? obstacles are preventing you from reaching	the target co	ndition? Whi	th one	Check on team's projects	5	М	Т	W	ŀ
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111111111111111111111111111111111111111	My Memory Jogger	Coaching	Projects
		Who? Observations/Coaching	
		Who? Observations/Coaching	
		Observations/Coaching	
		Vho?	Escalated Issues
		Observations/Coaching	CSCUIATED ISSUES
		Vho? Observations/Coaching	Future Actions

Name:						Leader Standard Work	
Veek:							
Daily Tasks/Committments	s (T	о [Do)			Monthly Tasks	"Red" Conditions for Me to Address & Follow Up
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Task Log	By When?		My Development Plan/Personal Goals for This Veek	Coaching
				Who: Observations / Coaching:
				Who: Observations / Coaching:
			Top Objectives for the Week	
		ı		Who: Observations / Coaching:
		ı	raue z	
		ľ	3 -	
			Coaching Mindset	Who: Observations / Coaching:
			Current Condition Vision / Ideal Vinderstand	
			and overcome From Mike Rother, Toyata Kata	
			What is the target condition?	Who: Observations / Coaching:
			What is the actual condition now? What obstacles are preventing you from reaching the target condition? Which one are you addressing now?	
			 What is your next step? What do you expect? (What is your next experiment?) 	
			5. When can we go and see what we have learned from taking that step?	

BENEFITS OF STANDARD WORK

- Structures and documents the work.
- Establishes the cadence to work.
- Easily identify standard vs. non-standard conditions.
- Supports practicing the routines necessary to ensure the management system improves.
- Coaches development of problem-solving capability.
- Contributes to increasing the rate of improvement of performance and development of people.

TRANSPARENT EXPECTATIONS

- Enables dialogue between each level of leadership:
 - Barriers to job.
 - Workload appropriateness.
 - What is needed from direct reports.
 - What is needed from management.
 - "Social contract" for leadership.

MEMORY IS NOT INFINITE

- Document and practice the routines necessary to ensure the management system functions efficiently.
- Reduce your reliance on memory to get things done.

Make it visual.

Make it permanent.

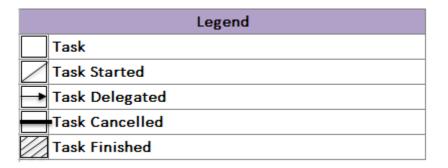
EXERCISE: LEADER STANDARD WORK

BUILDING YOUR STANDARD WORK

- Review Holly's Leader Standard Work document.
- Reflect on your personal current workload and routine.
- Review your job description and key activities/processes.
- Outline ideas for your Standard Work routine.
- Identify sections you want on your Standard Work document.

HOLLY'S LEADER STANDARD WORK

- Front
 - Monthly and daily commitments
 - Follow-up / waiting on / escalated items
 - Review checklist
 - To-Accomplish list
- Back
 - Yearly calendar for goals and deadlines
- Note: Legends are important.



	Legend
\bigoplus	Investigated
lacksquare	Counter-measure/Solution
•	Implemented
	Confirmed

Holly Zink

Research Project Development and Education 816 - 302 - 3203

Monthly Commitments

Follow-Up / Waiting On / Escalated Items

Legend

Task Task Started → Task Delegated

Task Cancelled

Task Finished

Owner

1 2 3 4 5

Leader	Stand	lard	Work
LCUUCI	June	uu	

Daily Commit	tmer	nts				
	М	Tu	w	Th	F	SS
Leader Standard Work						
To-Accomplish List Audit						
Today's Meeting Notes						
Tomorrow's Meeting Prep						
Review Che	cklis	t				
					1	2
Capture						
Get things out of your head onto p	aper					
Collect stray notes laying around						
Process notes into right place(s)						
Reflect on Last Week						
Did I get everything done? If not, w	hy no	ot?				
Review Calendar						
What commitments do I have?						
What preparation do I need to do?						
How much (sensibly) can I do in a da	ay?					
Allocate things from Monthly goals/	tasks	i.				
Make sure there's a balance in key a	reas.					

Ensure goals have a clear next action point.

Edit out impossible goals/projects/things.

Add any new goals/projects.

Dates:	
Focus:	
Habit:	

To-Accomplish
TO-ACCOMPIISM

January	Мау		September	
		-		-
		-		-
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				1
February	June		October	
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April	August		November	

CURRENT CONDITIONS

- Summarize your:
 - Key activities/processes (list 2-4)
 - Daily, Weekly, Monthly?
 - How do you communicate these items to others in your team?
 - Are there any visual metrics/charts/white boards for your team?
 - What other technologies are you using to track your to-do list?
 - Do you have employees that you are coaching or training?
 - How do you use your email inbox how do you want to use your inbox?
- What would you like to be doing differently?

READINESS FOR STANDARD WORK

- Ideas for my Leader Standard Work:
 - When/where am I going to check?
 - How will I learn critical information?
 - Who/what will I improve?
- What are my routines pertained to Leader Standard Work?
 - Daily Performance: Team check-ins, identify countermeasures.
 - Weekly: Check-in on goal progress, metrics, completing tasks.
 - Plan Review: Check that units are making progress on yearly objectives.
 - Observation/Coaching: Develop leaders through coaching.
 - Improvement Rounds: What issues do we need to address?

SUCCESS METRICS

- Ideas for my Leader Standard Work:
 - What/when will I check?
 - How to share what I learn?
 - With whom?
 - Focus on projects to improve.
 - When/how will I help implement and improve performance?
- What is something my team can count on me for from a metrics perspective?
- What key initiatives are my projects contributing to?

COMMON LEARNINGS

- Needing more consistency with application of the tool.
- Confusing Leader Standard Work with Outlook Calendar.
- Not reviewing Leader Standard Work with leader regularly.
- Focusing on Leader Standard Work on immediate tasks, not strategy or bigger picture.
- Leader Standard Work is a to-do list, or just check-the-box to get done.

IMPORTANT INSTRUCTIONS

- Your Leader Standard Work document is designed to be printed as a double-sided tri-fold brochure.
- Be mindful **not** to adjust column widths. Each of the 3 panels needs to be the same width in order to allow for panels to properly align when the page is trifolded.
- If your team uses a **metrics board**, match sections of your Leader Standard Work to the categorized metrics chosen for your specific area.

KEYS TO SUSTAINABLE PRACTICE

- Check each level of Leader Standard Work has some overlap and redundancy to provide linkage – make sure the information is logical and meaningful to you.
- Learning comes from **action**, excellence is more about what you do than what you know. Follow the process!
- Improve as your processes change, so must the standards of your work.
 - Hint: Leader Standard Work needs to change with it!

KEYS TO SUSTAINABLE PRACTICE

- Encourage and observe others using Leader Standard Work in your organization.
- Ask questions:
 - What are some challenges to using Leader Standard Work?
 - Some benefits?
- Look for things that could be added to your Leader Standard Work.
- Gain, maintain and sustain team involvement.
- Update your Leader Standard Work regularly—try new things!

CLOSING QUESTIONS

REFERENCES

- Mike Rother, Toyota Kata Managing People for Improvement, Adaptiveness and Superior Results (New York: McGraw Hill, 2009).
- https://www.lean.org/WhatsLean/

RECOMMENDED READING

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- Toussaint JS, Berry LL. **The promise of Lean in health care.** Mayo Clin Proc. 2013;88:74–82.
- Scoville R, Little K. Comparing Lean and Quality Improvement. IHI White Paper. Cambridge, Massachusetts: Institute for Healthcare Improvement; 2014.
- Sampalli T, Dessy M. Improving wait times to care for individuals with multi-morbidities and complex conditions using value stream mapping. Int J Health Policy Manag. 2015 Apr 5;4(7):459-66.
- Kanamori S., Sow S. Implementation of 5S management method for lean healthcare at a health center in Senegal: a qualitative study of staff perception. Glob Health Action. 2015Apr 7;8:27256.

LEADER STANDARD WORK

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