SOUTHWEST TRAINING INSTITUTE--SINCE 1988

DESCRIPTIONS OF PREVIOUSLY COMPLETED CONSULTING PROJECTS

PROBLEM SITUATION, APPLIED INTERVENTION, AND THE RESULTS

We take your existing problem or developmental area, propose an appropriate intervention for it, and help you apply the necessary efforts to achieve the desired results. It is difficult to be a prophet in your own land. Sometimes it takes an outsider to objectively understand the presenting issues, to perceive a given situation from a fresh and objective perspective, and to provide remedies that work right the first time. We have been helping client organizations since 1988—read about how we have helped our clients in a variety of situations.

1. STRATEGIC PLANNING & DIRECTION:

❑ **PROBLEM:** The organization was approaching the end of a long-term development cycle and was interested in looking forward to 2030. Much unused land and potential for growth needed to be tapped in order to remain competitive.

❑ **INTERVENTION:** Working with the Strgetic Planning Department and other Specialized Consultants, we gathered the key leadership groups throughout the organization (300+) in a series of discovery and planning sessions to identify key strengths, weaknesses, opportunities, and threats (SWOT Analysis) and determined the overall core development opportunities. This effort was called VFR2030 (Vision of the Future Realized--2030).

❑ **RESULTS:** This project is still ongoing. Phase I and II have been completed. Phase III Technical work sessions (with various planners, architects, and engineers) are now being held to identify the necessary change in systems and process in order to realize the future 2030 vision.

2. REDUCTION OF CYCLE TIME:

❑ **PROBLEM:** Various functions within a company division worked in silos *(composed of purchasing, planning, engineering, quality, test/inspection, and warehousing)*, which resulted in a lengthy cycle time of more than 40 days.

❑ **INTERVENTION:** Created over 30 cross-functional teams in order to reduce cycle time and to help people work more effectively together. Implemented change management interventions, team development, barrier removal and process redesign.

❑ **RESULTS:** As a result of these efforts, reduced cycle time by more than 73% over a two-year period.

3. DESIGN OF INDIVIDUAL PERFORMANCE METRICS:

❑ **PROBLEM:** Increasing people performance had become a major corporate thrust, but with very little understanding of what that performance looked like, let alone a method to measure its development over time.

❑ **Intervention:** Defined the concept of "high performance," created a list of performance factors, and an on-line method of measurement. Each employee answered this on-line set of 12 questions semi-annually. The questions addressed issues of collaboration, risk taking, efficiency, innovation, diversity and best-practice sharing.

❑ **Results:** This effort led to the design of a set of metrics that measure desired behavioral characteristics that could be improved over time.

4. TRAINING DELIVERY AND REPORTING:

- ❑ **PROBLEM:** There was no system to track or monitor training delivery and application, and it was not clear whether employees had completed a particular curriculum of courseware, and how, in fact, the training was being applied on the job.

- ❑ **INTERVENTION-A:** Designed a Training Report System that identified which individuals within each organization, site, cost center and team had completed particular courses.

  - ❑ **RESULTS:** This system provided a ready reference for selecting additional training as well as predicting shoploads for the following year.

- ❑ **INTERVENTION-B:** Implemented an on-line Training Feedback System to measure level-3 evaluation of learning (the degree of job transfer) for each course specified. Under this System, former students would be directed to an on-line site six months after they had completed a class They were asked follow-up questions in relation to the skills learned in a particular class.

  - ❑ **RESULTS:** This System provided information about the percent of job transfer for each course objective.

- ❑ **INTERVENTION-C:** Instituted a Training Coupon Plan, whereby an employee could earn one hour of learning credit by applying to real life the techniques taught within certain courses. Students would receive training credit if they were able to document at least two occurrences where they had applied, on or off the job, the objectives taught in a given course.

  - ❑ **RESULTS:** This plan encouraged the application of learning to real-time use both professionally and personally.

5. **UTILIZATION OF STRATEGY PLANNING TOOLS:**

- ❑ **PROBLEM:** Goals were not being uniforming understood or followed

- ❑ **INTERVENTION:** In an effort to improve shared goal setting, facilitated multiple Strategy Planning Sessions for various groups within the organization.

- ❑ **RESULTS:** The sessions identified key tasks for the upcoming year, redesigned an entire work function, merging work processes, re-engineering existing work processes, or merging the processes of several divisions into one. Introduced key aids such as the Six Thinking Hats, Lateral Thinking and DATT.

6. **CREATION OF A CAREER COUNSELING-MENTOR PROGRAM:**

- ❑ **PROBLEM:** The annual Corporate Attitude Survey consistently revealed that not enough attention and interest was given to career aspirations and progression.

- ❑ **INTERVENTION:** Developed a Career Counseling Program that identified interested professionals and trained them to be mentors for those seeking career guidance and information about various job functions.

- ❑ **RESULTS:** Collected metrics that resulted in vastly improved career-focused issues.

7. **ESTABLISHMENT OF AN ON-LINE RECOGNITION PROCESS:**

- ❑ **PROBLEM:** Because people naturally minimize praise and maximize criticism, it was felt that company personnel needed a better understanding of what recognition meant, and a means to deliver it with ease.

- ❑ **INTERVENTION:** Developed an on-line Recognition System, which made it simple to communicate praise electronically. Conducted Reward and Recognition briefings, which helped everyone involved develop the skill of positive reinforcement. Designed "Thank You" notecards, and made available films and books on the topic.

- ❑ **RESULTS:** Improved morale and increased levels of trust and compatability resulted

8. **IMPROVEMENT OF CUSTOMER SERVICE:**

- ❑ **PROBLEM:** There was a lack of understanding about customer service and continuous improvement concepts.

- ❑ **INTERVENTION:** Met with individual employee groups to understand the current state and determine greatest needs. Designed a two-day program that became mandatory training for all personnel. As part of the training, students participated in guided discussions with their customers about specific expectations. Introduced quality-measuring tools for the application of continuous improvement processes. Formed a Customer Satisfaction Quality Improvement Team to continuously remove barriers and respond to issues.

- ❑ **RESULTS:** These efforts resulted in customers becoming allies, working mutually to solve organizational problems and challenges.

9. ASSESSMENT OF ORGANIZATIONAL LEARNING NEEDS:

- ❑ **PROBLEM:** There was a minimum annual requirement of 40-hours of new learning for each employee.

- ❑ **INTERVENTION:** Designed a survey to determine the learning interests and needs of the organization, and developed and/or located the appropriate courseware to meet the needs identified. Hired and/or personally delivered training on topics such as creativity and innovation, *(Six Thinking Hats, Lateral Thinking, Direct Attention Thinking Tools);* quality courses such as quality effectiveness, Six Sigma and Cycle Time, customer service; and team development such as time management, personality assessment, diversity awareness, listening, stress management, and meeting effectiveness.

- ❑ **RESULTS:** All members of the group successfully achieved the annual learnng requirement

10. PREPARATION OF DIVERSITY SKILLS DATA:

- ❑ **PROBLEM:** With an increasing focus on workforce diversity, understanding and embracing the unique blend of the team was important to achieve.

- ❑ **INTERVENTION:** Designed a Diversity Skills Assessment with 360-degree feedback for leaders. Each leader received qualitative and quantitative feedback from superiors, peers, and direct reports with respect to their observed diversity practices.

- ❑ **RESULTS:** This feedback led to increased awareness and sensitivity about a leader's diversity habits. A list of key actions were then developed based upon the results of each assessment.

11. DEVELOPMENT OF QUALITY IMPROVEMENT TOOLS:

- ❑ **PROBLEM:** The company was looking to align its goal setting practices, tops down throughout the organization.

- ❑ **INTERVENTION:** Implemented a Goal-Setting Process *(called Catchball)* through the use of the Oregon Productivity Matrix *(OPM)* within a company Division. Trained all personnel in the Process and assisted in the selection of appropriate team metrics. Established quarterly team reviews to monitor goal progress.

- ❑ **RESULTS:** As a result, employees and teams worked collectively toward common goals that benefited the larger organization; greater corporate alignment was achieved.

12. ENHANCEMENT OF COMMUNICATIONS:

- ❑ **PROBLEM:** There was a lack of effective communication within the organization.

- ❑ **INTERVENTION:** Created the Coffee Exchange Program for all level-3 managers on a bi-monthly basis. Within this Program, each organization randomly selected a representative sampling of their membership and invited them for an informal Coffee Exchange with his or her manager. The participants were free to discuss any topic they found to be important.

- ❑ **RESULTS:** The response to the Program was so positive that level-2 managers began to conduct Exchanges on a quarterly basis, videotape them for distribution to all sites.

13. **IMPLEMENTATION OF THE AMBASSADOR/NEWCOMER PROGRAM:**

- ❑ **PROBLEM:** Retention of new hires was decreasing.

- ❑ **INTERVENTION:** Developed an Ambassador-Newcomer Program that connected new hires with trained ambassadors who became the Newcomer's friend and confidant for the first three-six months on the job. The Program was divided into three segments that would encourage Newcomers to engage in activities that help them quickly learn the ropes.

- ❑ **RESULTS:** The Program was a big success story for the company, as it positively impacted attrition and longevity within that Division.

14. **RESOLUTION OF INTERNAL CONFLICTS:**

- ❑ **PROBLEM:** Conflict within the teams was an ongoing problem. The teams were striving to become self-directed and were expected to resolve internal problems without Team Leader interference.

- ❑ **INTERVENTION:** Worked closely with Human Resources to create a Process to Resolve Team Differences which included the development of operating agreements, the study of personality styles, and a step-by-step process flow to resolve basic differences all the way through and including termination.

- ❑ **RESULTS:** As a result, teams better understood their roles and the extent of their empowerment as it related to settling differences with fellow team members.

15. **EFFECTIVE LEADER FEEDBACK SYSTEM:**

- ❑ **PROBLEM:** Teams lacked a method to provide anonymous performance feedback to their team leader.

- ❑ **INTERVENTION:** Designed an on-line Effective Leader Feedback System with input generated by team members--a set of 50 desirable attributes. Semi-annually, each leader received compiled data in relation to those 50 attributes. Private sessions were scheduled between the leader and respective team members to discuss in greater detail the top five or six attributes that team members would like to see more of and specifically what key actions *(start doing or stop doing)* would enhance each attribute category.

- ❑ **RESULTS:** The result was greater satisfaction within teams since there was an appropriate vehicle to express concerns and issues.

16. **LEADERSHIP ENHANCEMENT LEARNING SERIES:**

- ❑ **PROBLEM:** Once leadership feedback was gathered, there was a lack of learning opportunities available.

- ❑ **INTERVENTION:** Based upon the leader's feedback from the Leader Feedback System, created a "Leadership Enhancement Learning Series" with topics delivered over lunch as brown bag luncheon sessions. Leaders, having had specific feedback, were able to choose which learning topics to attend. This was not only a convenient delivery mechanism, but was also relevant to the leader's developmental needs, as perceived by the team.

- ❑ **RESULTS:** Improvements could be easily traced to the learning opportunities.

17. **TEAM DEVELOPMENT ASSESSMENT:**

- ❑ **PROBLEM:** Empowerment is a word that is easy to use but very difficult to explain, implement, and measure.

- ❑ **INTERVENTION:** Defined empowerment and designed a Team Performance Assessment that measured team practices in relation to 30+ attributes. The goal was to develop capability in all attribute categories.

- ❑ **RESULTS:** In two years, the teams that I worked with (within one division of a company), advanced from an average score of 1.5 to 4.5 (on a five-point scale) and captured 45% of the Team Practice Awards while representing only 15% of the entire participating population (more than 10,000 people).

18. **PEER FEEDBACK PROCESS:**

   ❑ **PROBLEM:** Teams reached a point in their development where they wanted to engage in a peer feedback process.

   ❑ **INTERVENTION:** Assisted teams to devise processes that would measure the desired characteristics each member of the team was to demonstrate. Through this process of feedback, each team was more comfortable in the quality of interface they enjoyed with and through each other.

   ❑ **RESULTS:** Each team member had a primary attribute that they were trying to improve upon as well as acknowledged key attributes that they had already gained mastery of.

19. **TEAM PLANNING STRATEGY SESSIONS:**

   ❑ **PROBLEM:** Each team had gained in their development to the point of planning and strategizing mutual (individual & team) goal setting.

   ❑ **INTERVENTION:** Developed the Team Facilitation Planning Process where the team identified areas of accomplishment, areas of desired improvement, and the key actions necessary for growth and development. This intervention also focused on personality issues to help team members advance to the next level of self and group awareness.

   ❑ **RESULTS:** The result was a process for teams to ongoingly develop within their desired scope of maturity.

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