

# Leaning In Together:

Role Clarity for Effective  
Organizational Transformation



# About Me

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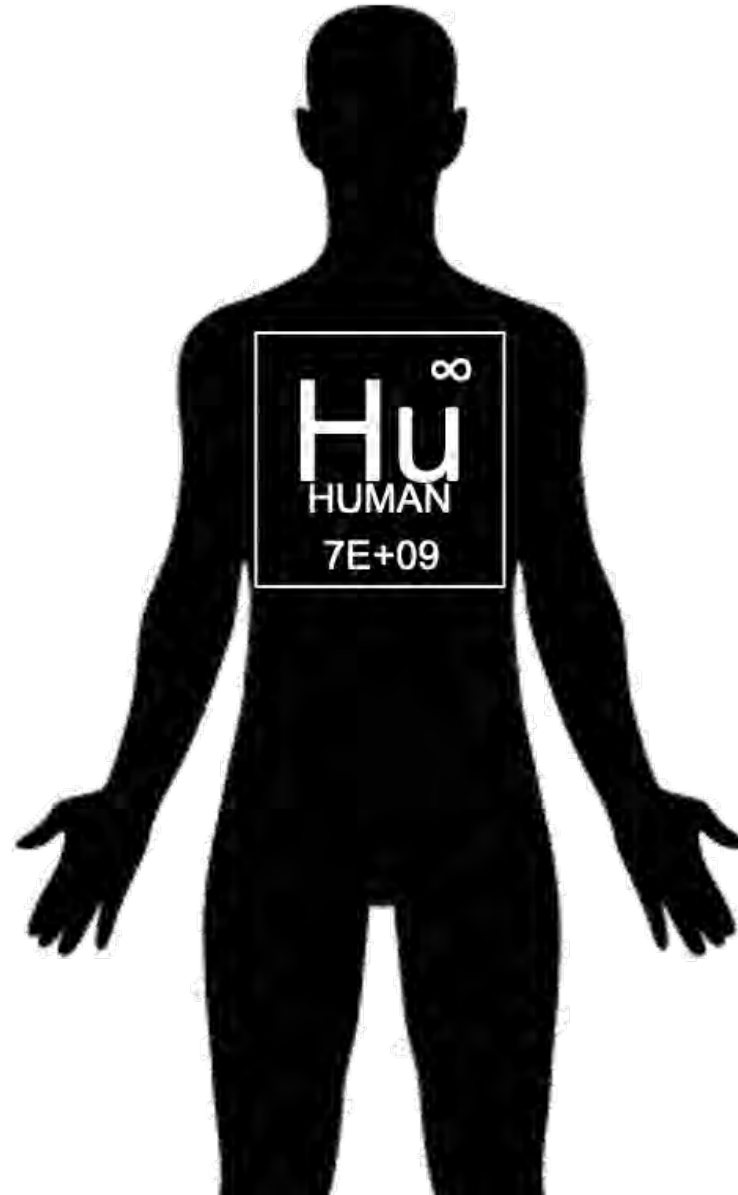
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# What is Lean?

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# Lean Principles

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- **RESPECT FOR PEOPLE**
- **LEAD WITH HUMILITY**
- **LEARN CONTINUOUSLY**

**ENGAGE**

- **CONSTANCY OF PURPOSE**
- **CREATE VALUE FOR THE CUSTOMER**
- **SYSTEMS THINKING**

**ALIGN**

- **ALWAYS STRIVE FOR PERFECTION**
- **SOLVE PROBLEMS SCIENTIFICALLY**
- **EMBRACE STANDARDIZATION**

**IMPROVE**

# Behavior Based Model for Organizational Transformation





A vertical rectangular image on the left side of the slide. It shows a dense forest of birch trees with white bark and green foliage, partially obscured by mist or fog. At the bottom of this image is the logo for 'BIRCH CONSULTING, LLC'.

Have you ever  
experienced...

- A series of point improvements without an overall strategy?
- Resistance to continuous improvement efforts?
- Leaders dictating the use of a tool?

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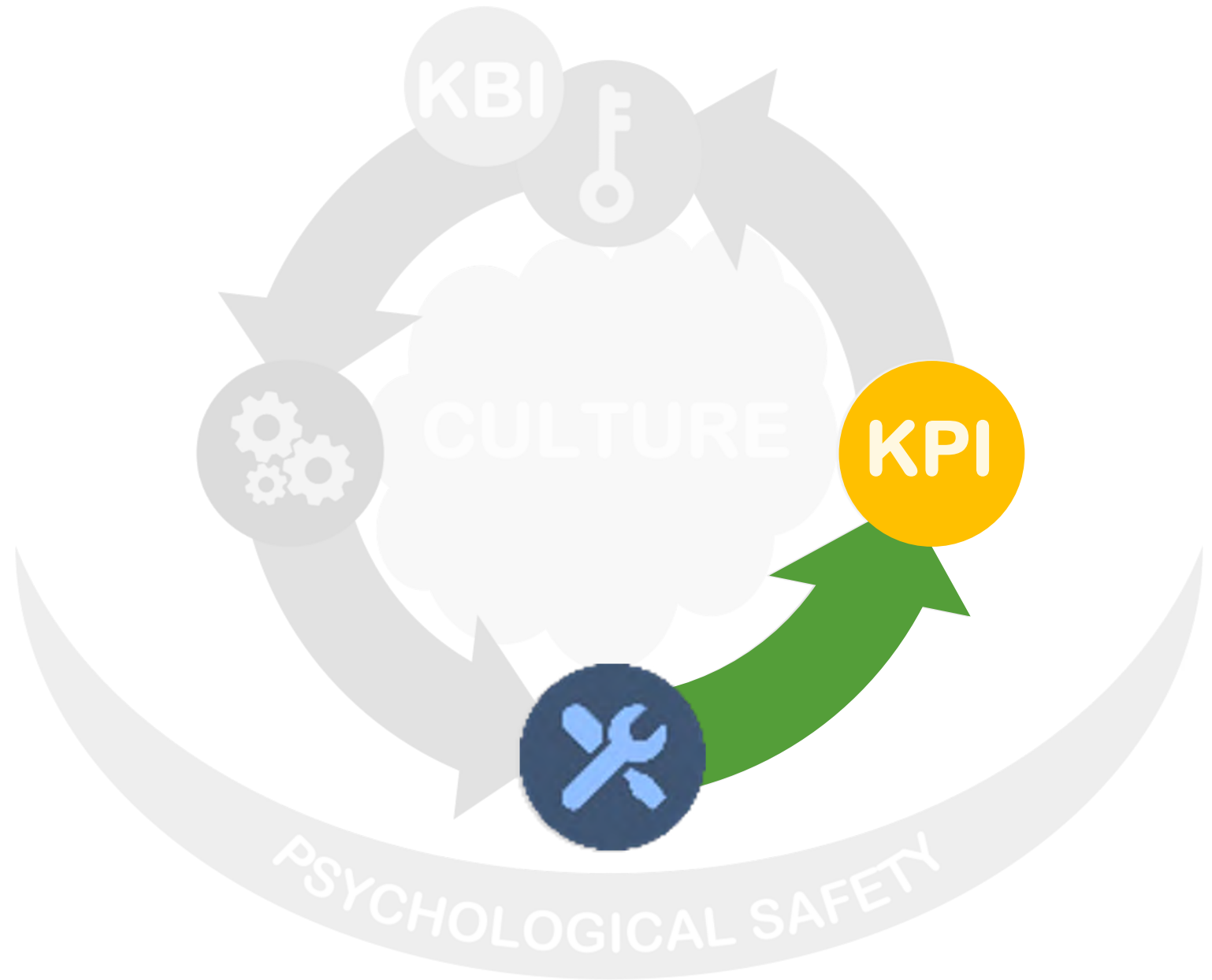
“Driving  
Results”

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“Quick  
Wins”

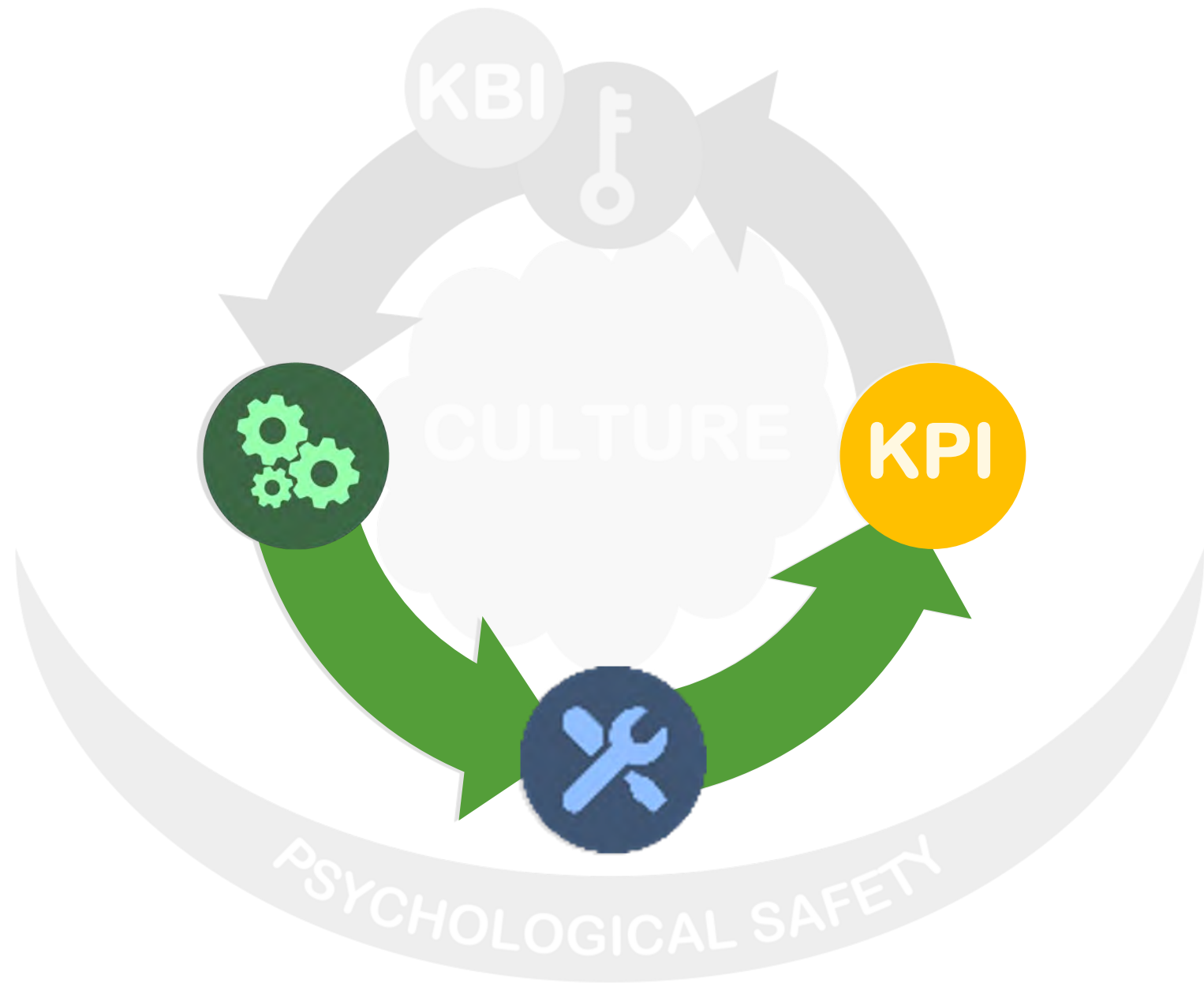
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# “The Program”

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# Traditional outcomes





A photograph of two hikers walking away on a rocky forest trail. The hiker in the foreground is wearing a teal long-sleeved shirt and blue pants, using a green trekking pole. The hiker behind is wearing a grey shirt, green pants, and a red backpack. The trail is covered with rocks and fallen leaves, flanked by mossy logs and dense green forest. Sunlight filters through the trees.

# A new path

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# Principles

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# Lean Principles

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**ENGAGE**

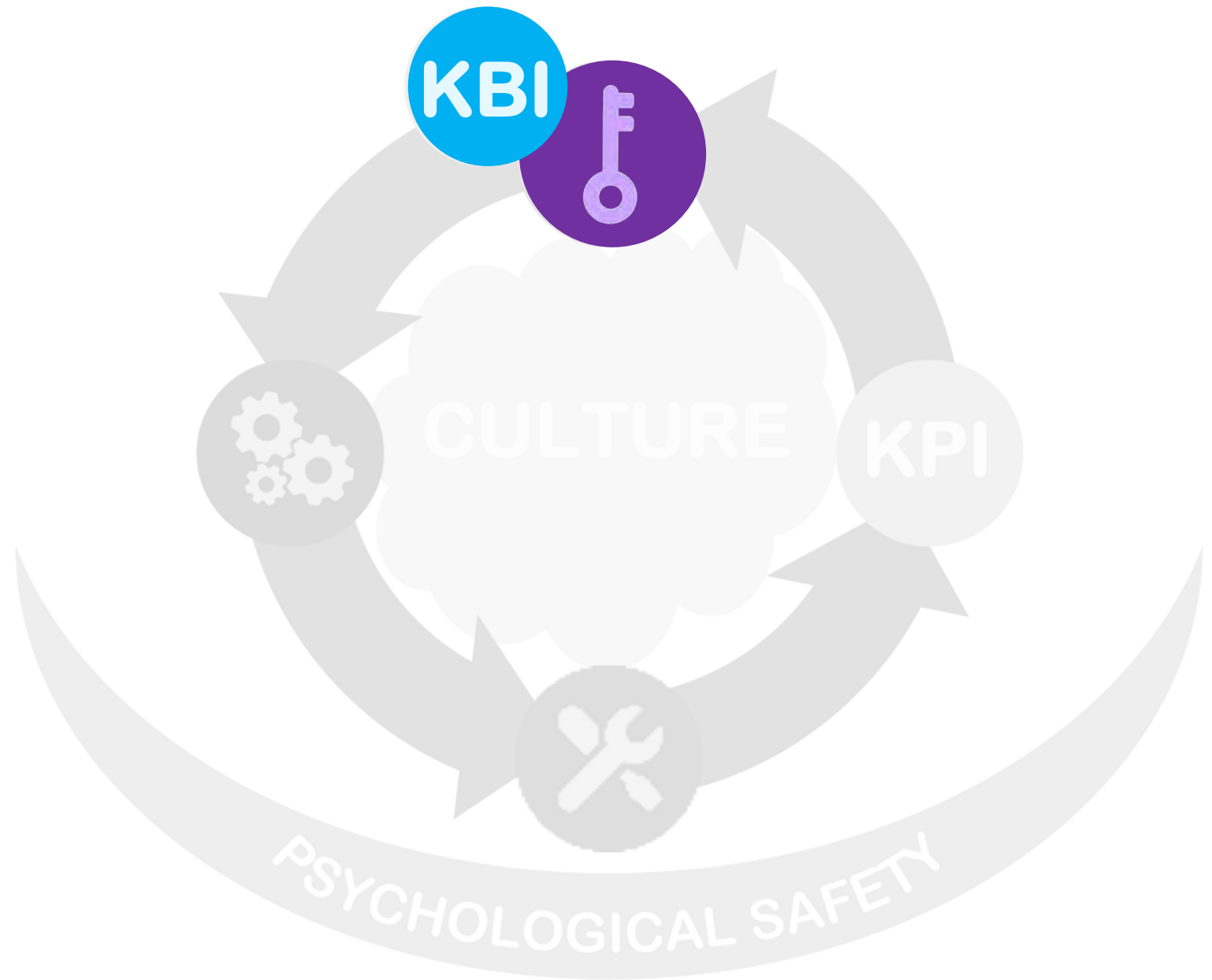
- **CONSTANCY OF PURPOSE**
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**IMPROVE**

# Behaviors Rooted in Principles

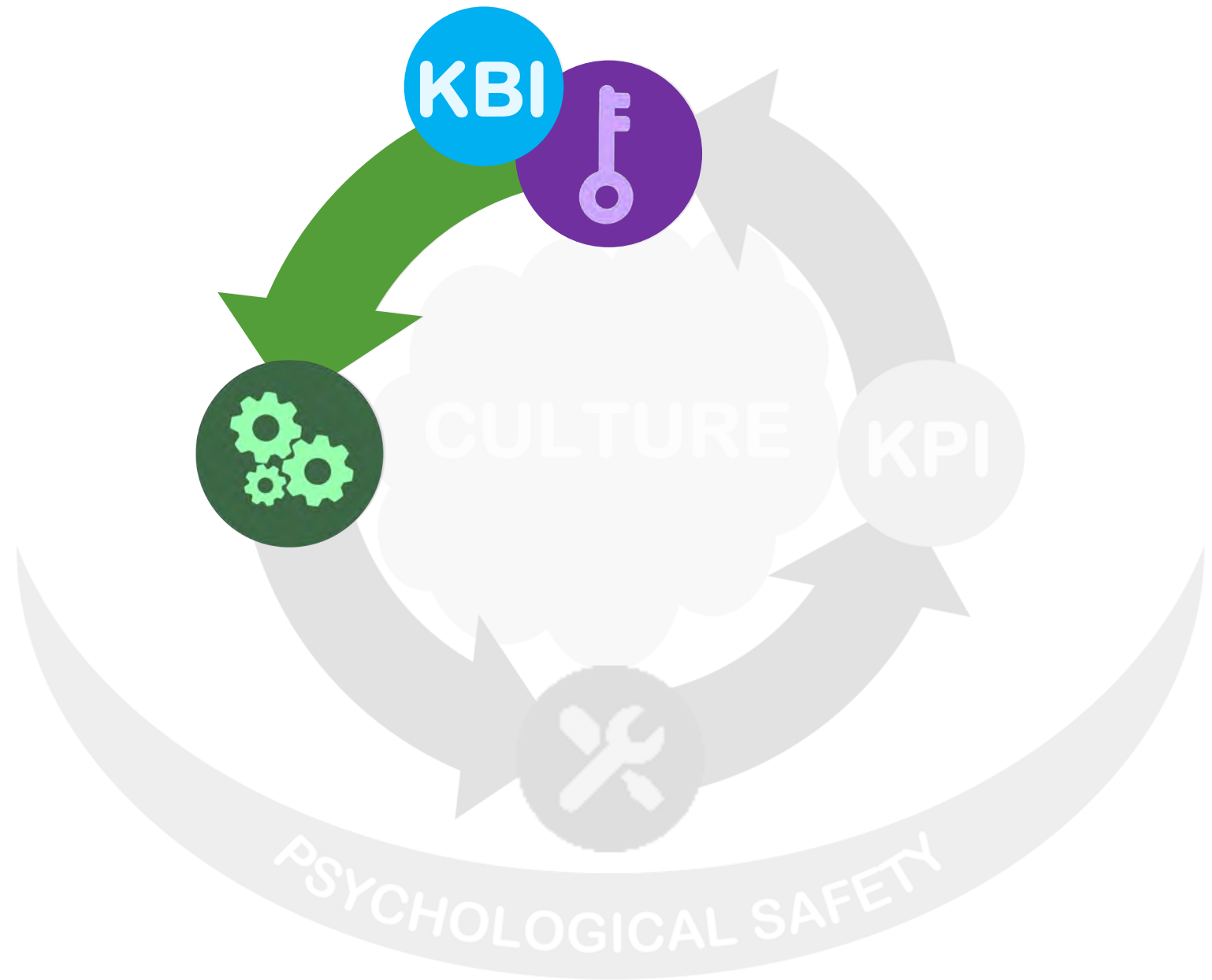
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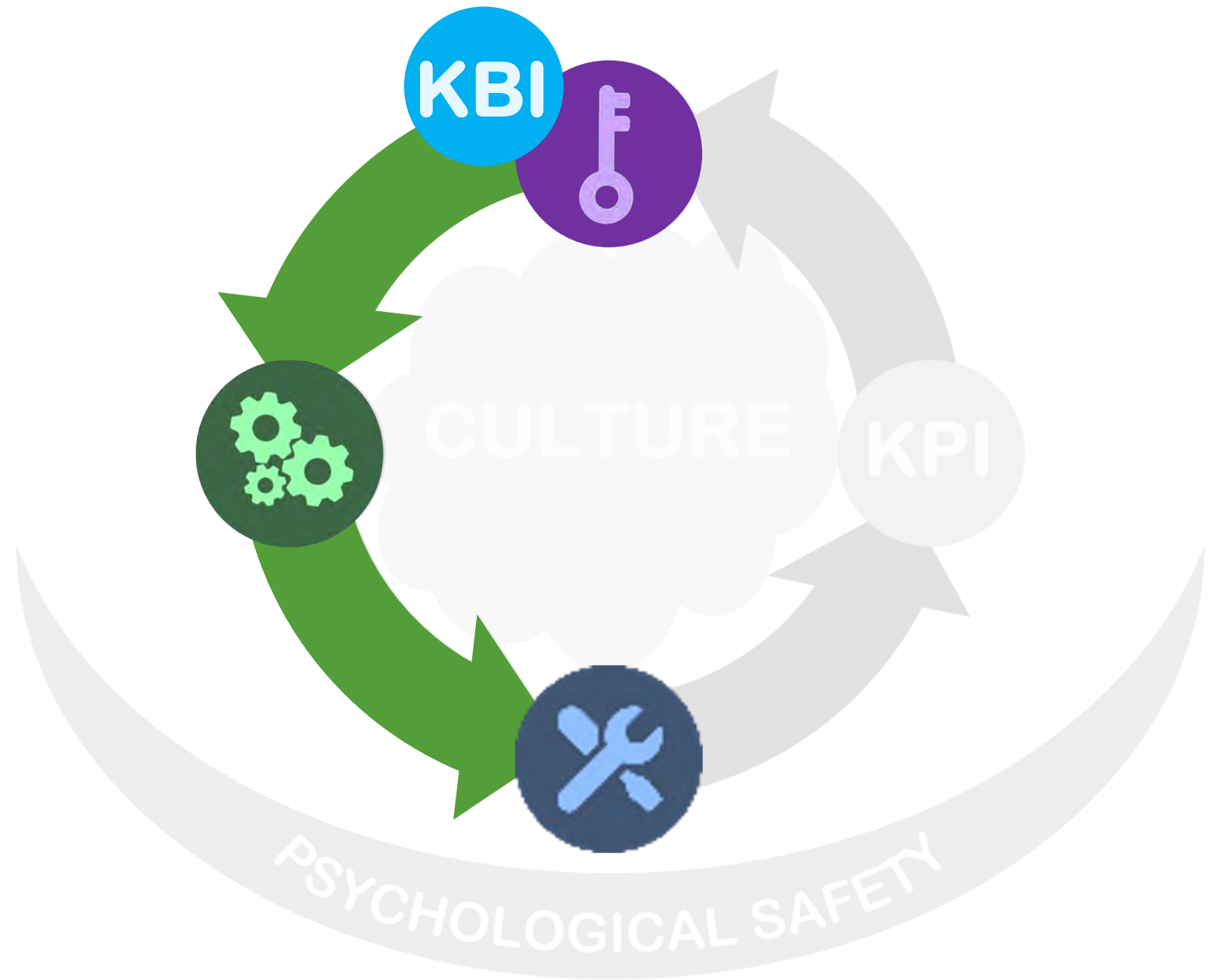
# Systems Support Behaviors

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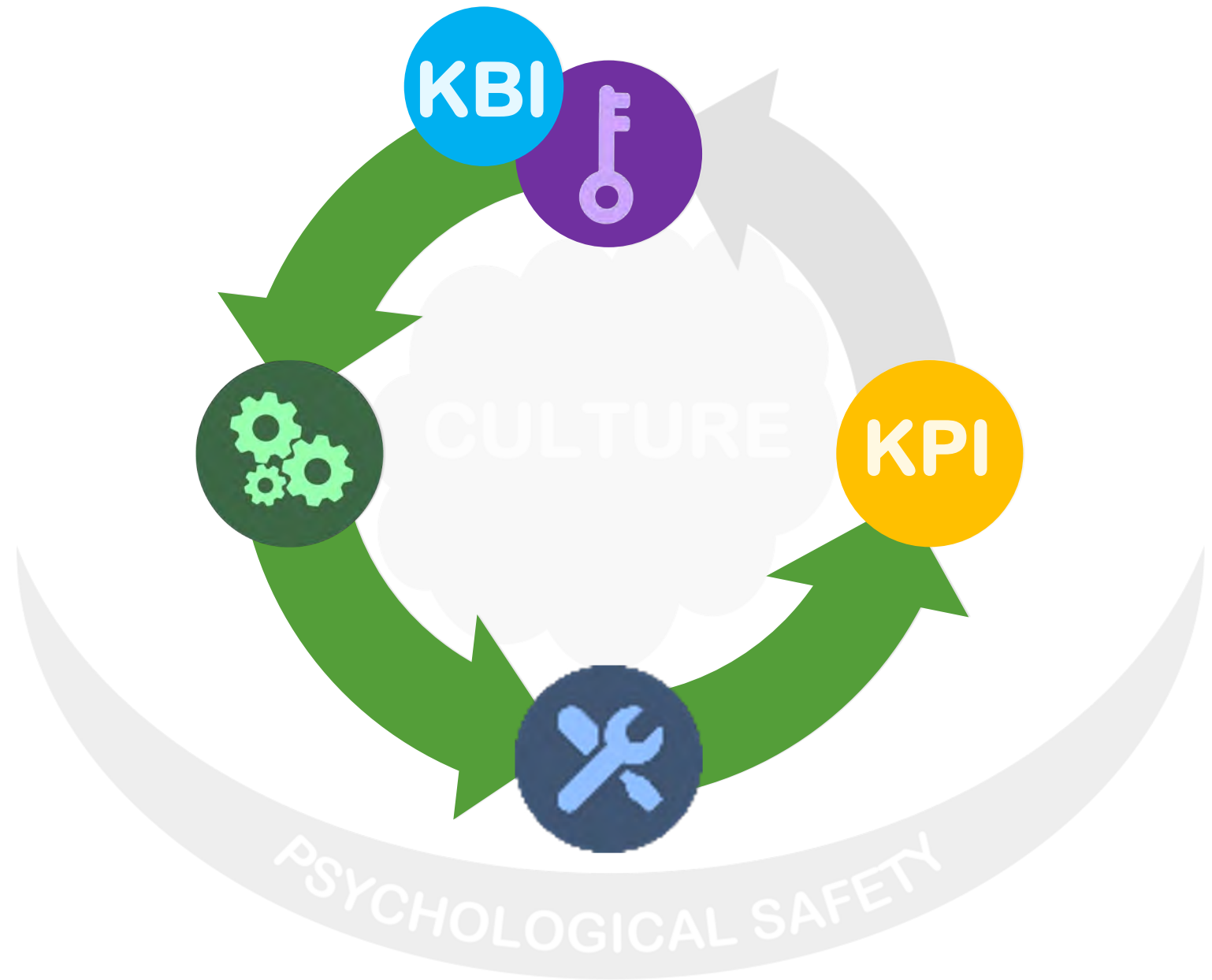
Tools are  
“Pulled”

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Tools  
Improve  
Results

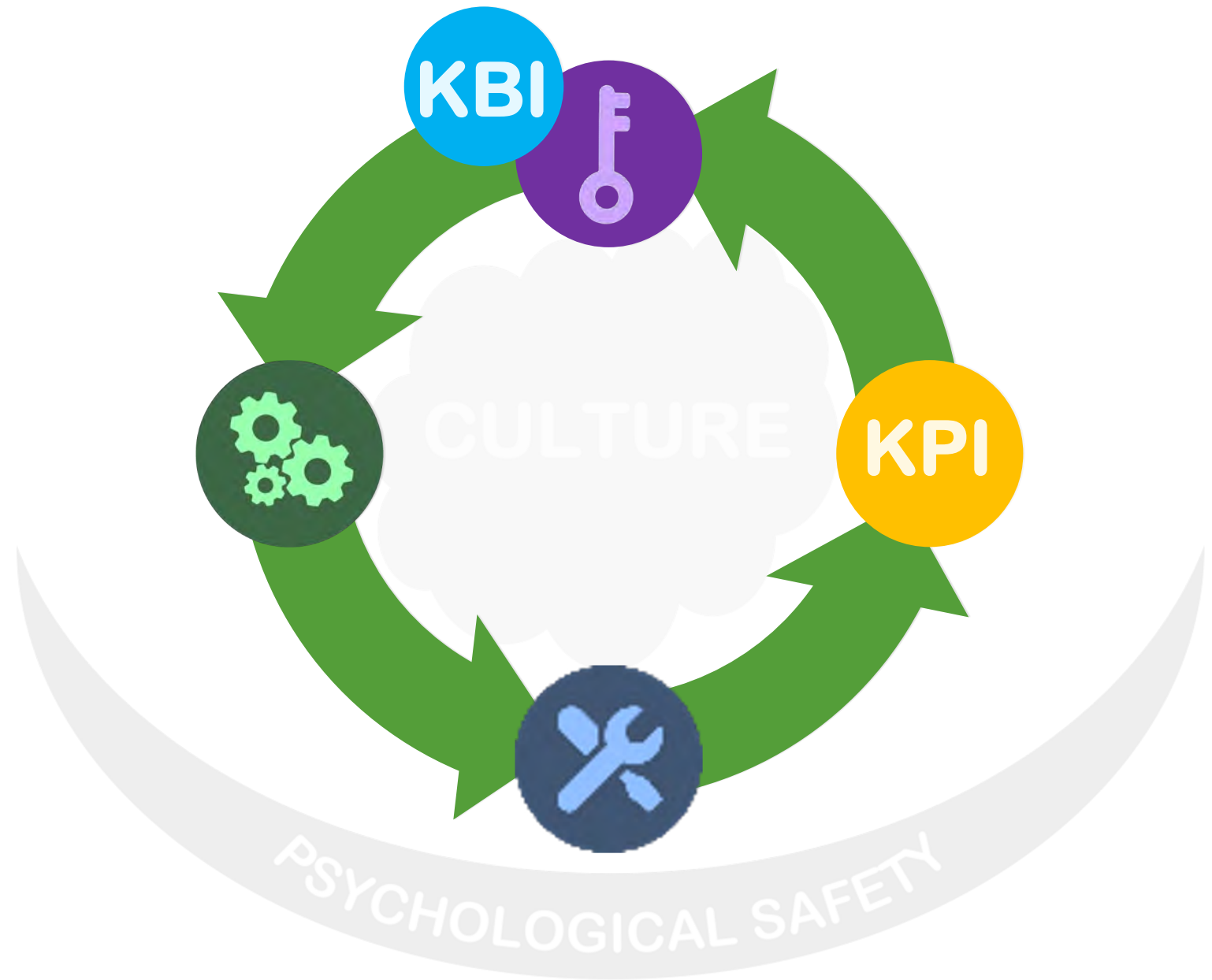
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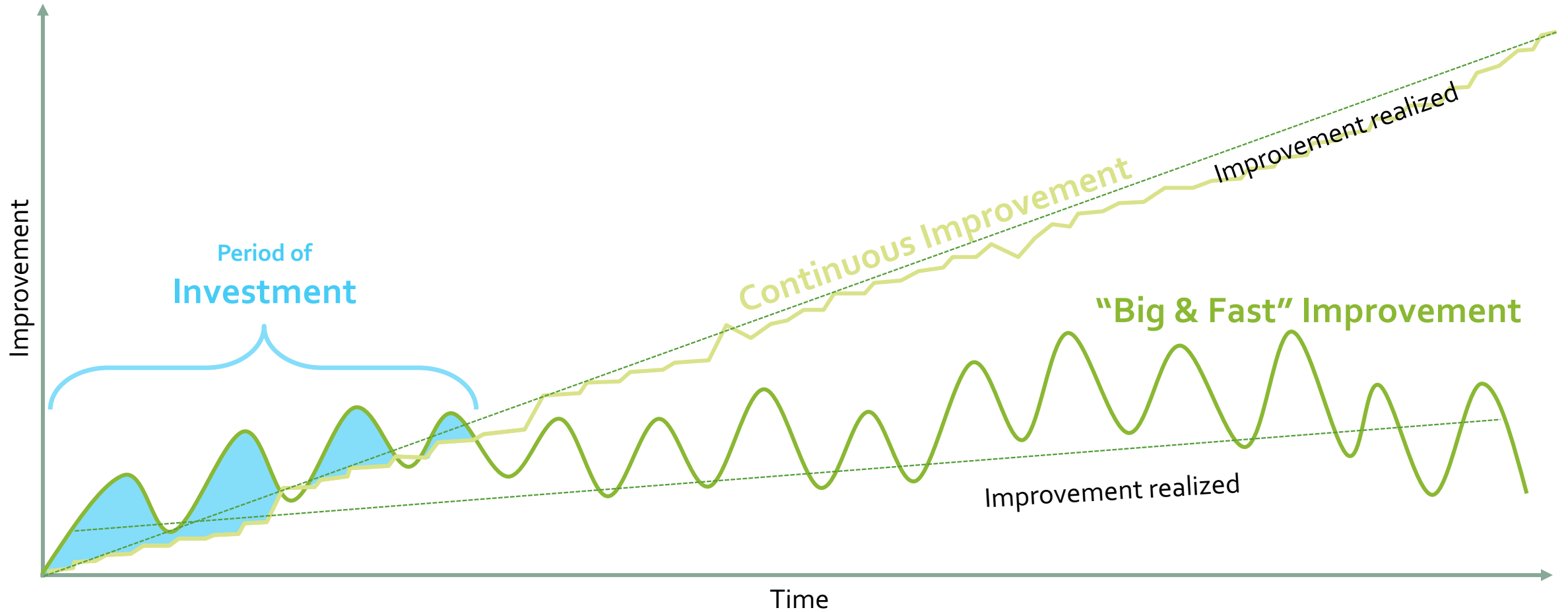


Results  
Inform  
Behaviors

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# Radical outcomes



# Example

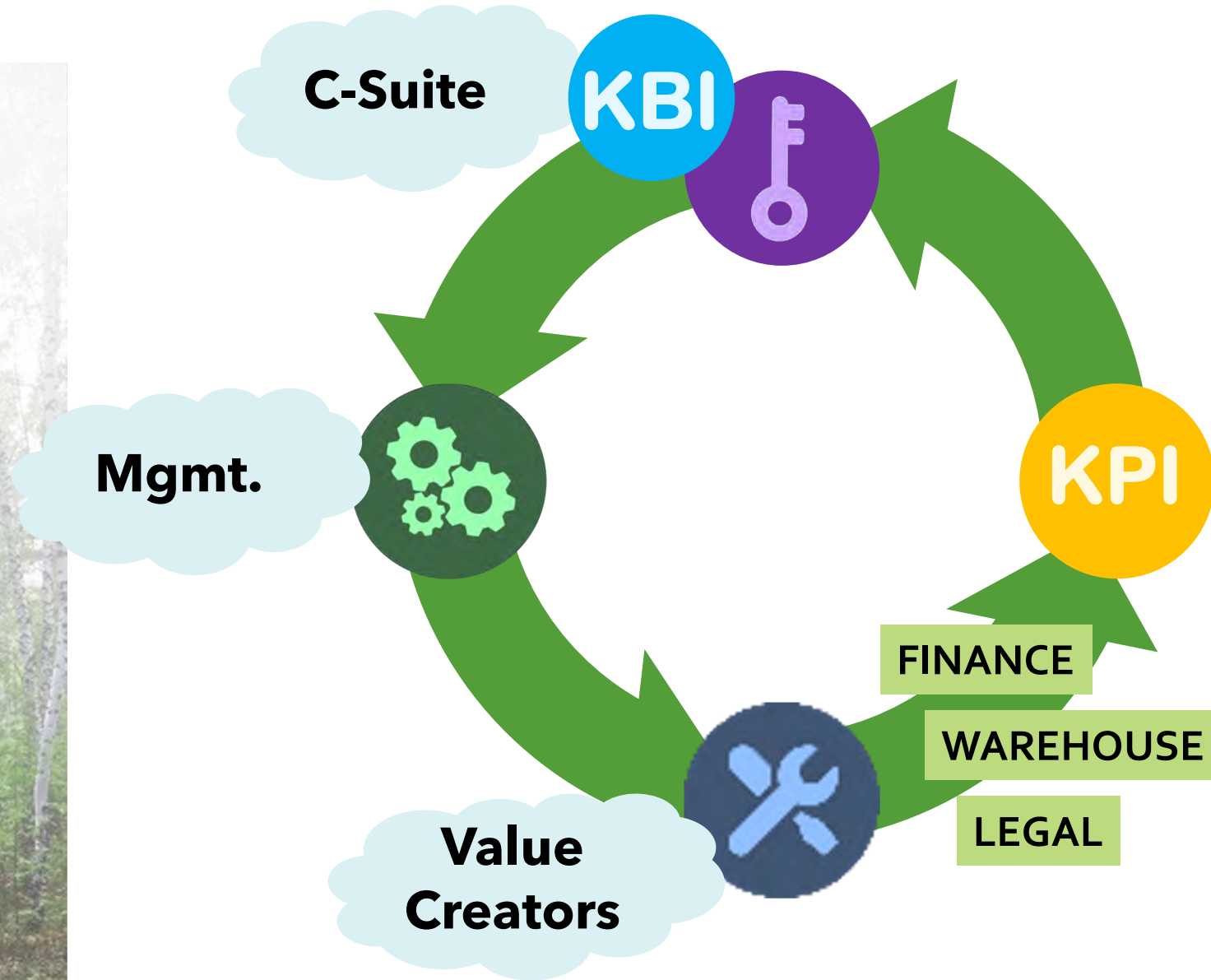
How the model can actually work in real life





# Example

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# Role Clarity

Principle-Centered and Behavior Based



# Roles

## LEADERS

CEO      PRESIDENT      VICE PRESIDENT  
EXECUTIVE DIRECTOR      DIRECTOR  
BOARD OF DIRECTORS

## MANAGEMENT

SENIOR MANAGER      MANAGER  
PROGRAM/PROJECT MANAGER  
SUPERVISOR

## VALUE CREATORS

SPECIALIST      ANALYST      LEAD  
CLERK      PROCESSOR      ASSISTANT  
AGENT      OPERATOR

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## Behavior Based Role Clarity

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# Respect for People

### LEADERS

- Routinely provide employees with opportunities to grow.
- Proactively resolve issues of health, safety and environment.
- Encourage & reward safety issues brought forward.
- Seek to understand patterns that impede results

### MANAGEMENT

- Involve front-line staff in improving the work in their area.
- Provide coaching for problem solving, by first listening to understand.
- Proactively resolve issues of health, safety and environment.

### VALUE CREATORS

- Proactively resolve issues of health, safety and environment.
- Engage in active listening to understand and show respect.
- Help develop and document current best processes (standards) representing the agreed current best way to do the work as a basis for improvement.

## Behavior Based Role Clarity

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# Lead with Humility

### LEADERS

Maintain open and honest communication with everyone.  
Treat all ideas as equal in value, no matter whose idea it is.  
Ask supportive questions rather than giving answers.  
Seek input to encourage solutions built by collaboration.

### MANAGEMENT

Maintain open and honest communication with everyone.  
Treat all ideas as equal in value, no matter whose idea it is.  
Ask supportive questions rather than giving answers.  
Identify and communicate trends about what is working.

### VALUE CREATORS

Listen to and communicate feedback from the customers, fellow staff members, and stakeholders that may impede the value-creation process.

## Behavior Based Role Clarity

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## Learn Continuously

### LEADERS

Embrace continuous learning by asking questions and listening emphatically to understand. "what did you learn?"

Learn and teach managers how to better engage and support their areas of responsibility in achieving goals.

### MANAGEMENT

Emphasize what they and others are learning on a daily basis, especially learning about experiments that failed.

Identify learning as ongoing and actively seek ways to help the value creators develop their talents and skills.

### VALUE CREATORS

Discuss the learning in improvement experiments.

Engage in peer to peer idea sharing on a routine basis.



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# Sustaining the Cycle

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# Where to Start?

Leaders set the tone.  
Leaders learn by doing.  
Leaders share their learning.

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# Resources

- Shingo Institute [Shingo.org](https://Shingo.org)



- Institute for Enterprise Excellence [InstituteForExcellence.org](https://InstituteForExcellence.org)



- Lean Enterprise Institute [Lean.org](https://Lean.org)



- A Human Workplace [MakeWorkMoreHuman.com](https://MakeWorkMoreHuman.com)



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Q & A

