Productivity in the Digital Workplace

Merging Lean Concepts with Digital Capabilities for Daily Operational Work

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ICBC

Land Acknowledgement

Presenters

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Agenda & Purpose

1. Why digital productivity matters

2. How lean concepts can help

3. Playbook based on PDCA

4. Assessing where to start

5. Q&A

Operations in the Digital Workplace
Common Operational Routines & Rhythms

Alignment on Plan & Issues
- Communicating priorities
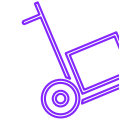- Issues notification & tracking
- Huddles
- Progress reporting

Finding Better Ways of Working
- Problem solving & collaboration
- Project execution coordination

Daily Routine

Delivering on services/products
- Team meetings (agenda and actions)
- Workflow/work assignment
- Approvals

Enabling People
- Team reference, standards and training
- Team building
- Social connection/chats

Poll: What does the digital work environment feel like for your team when it comes to day to day work?


A

B

Why might this be a struggle?

- Speed of change
  - Pandemic
  - Ways of working
  - Rapid changes and options around technology

- Challenging to maintain focus - administrative tasks generally low priority

- Scalability challenge - Starting point can be different for each individual/team

- More intention needed to "see" waste/opportunity in digital workplace

Opportunity Cost to All

Visible productivity loss
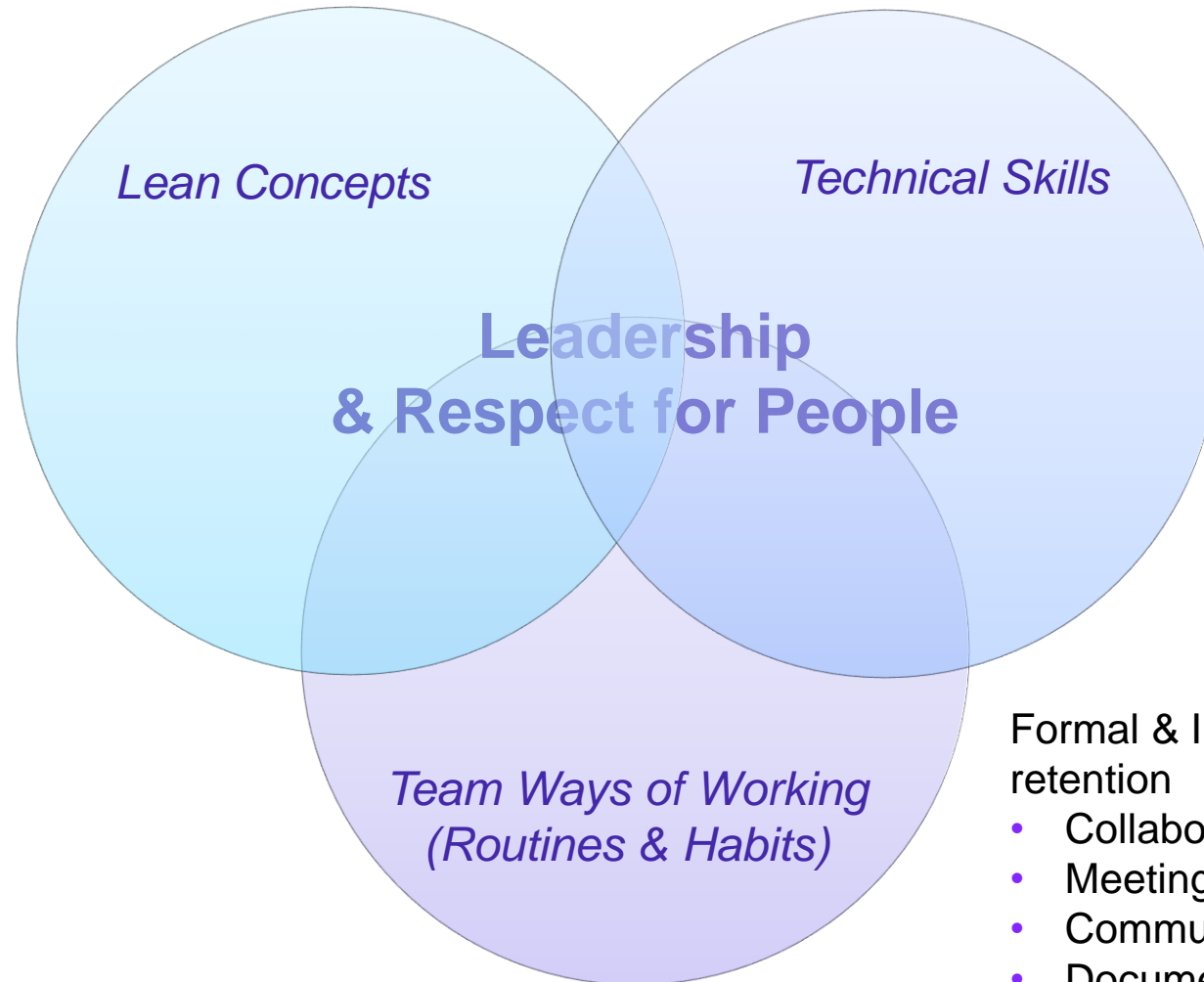
- e.g. every person loses 5 min each day
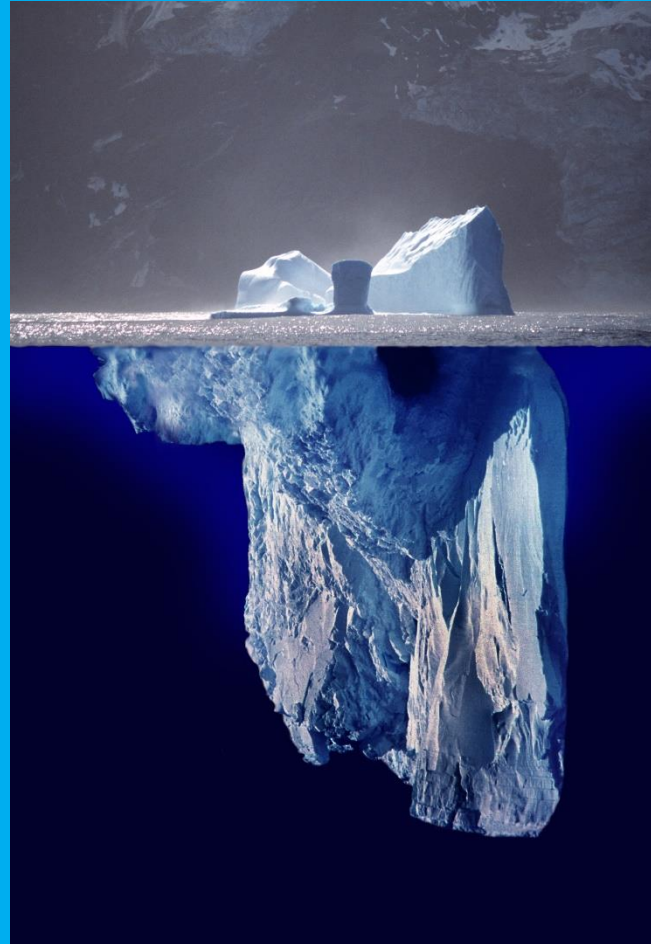
Team costs that go undetected

- *Frustration & dissatisfaction*
- *Obstacles to building teamwork and trust*
- *Errors, delays & rework*
- *Not delivering to purpose effectively*
- *Wasted skills*

How Can Lean Practices & Mindset Help?

- Gemba
- PDCA
- 5S
- Standardization
- Lean management

Lean Concepts

Technical Skills

Leadership & Respect for People

Team Ways of Working (Routines & Habits)

- Technical training/resources
  - Application specific
  - Norms for different use cases*

Formal & Informal Routines & Habits retention
- Collaboration
- Meetings
- Communication (e-mail, chat, etc)
- Documentation of standards
- Social norms
- Etc.

9

How to get out of the digital mire?

The role of leadership

"Leadership is the ability to get individuals to work together for the common good and the best possible results while at the same time letting them know they did it themselves."

John Wooden

- Don't Panic

- Lighten the Load

- Move Slowly but Surely
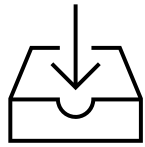
- Take Frequent Breaks

- Ask for Help

Source: www.outofchaos.ca

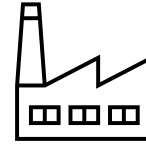# Digital Odessey

Stories from the trenches
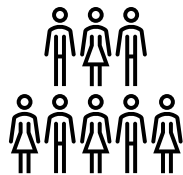
Claims Administration Department
The "glue" that holds the claims process together
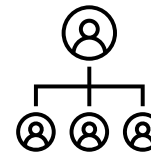
- Work arrives in various queues
- Directed by front line claims handling staff
- Automatically as part of a business process

- Over 20 different services
- 30,000 work requests completed per month
- Complete tow request
- Process customer reimbursement

- Two Operational Managers
- 20 Front Line Managers
- 250 staff
- Province Wide

- First time managers
- Various skill levels

Digital Workplace Current State

"Frustrating and time consuming to find what I need"

OneNote

- **Baseline:** 160 OneNote
- **Usage:**
    - Team meetings
    - Best practices
    - Problem solving

MS365 Knowledge

- **Baseline:** Low
- **Usage:**
    - Teams / Channels
    - Meetings
    - SharePoint
    - Office suite

Key Information Assets

- **Baseline:** None
- **Usage:**
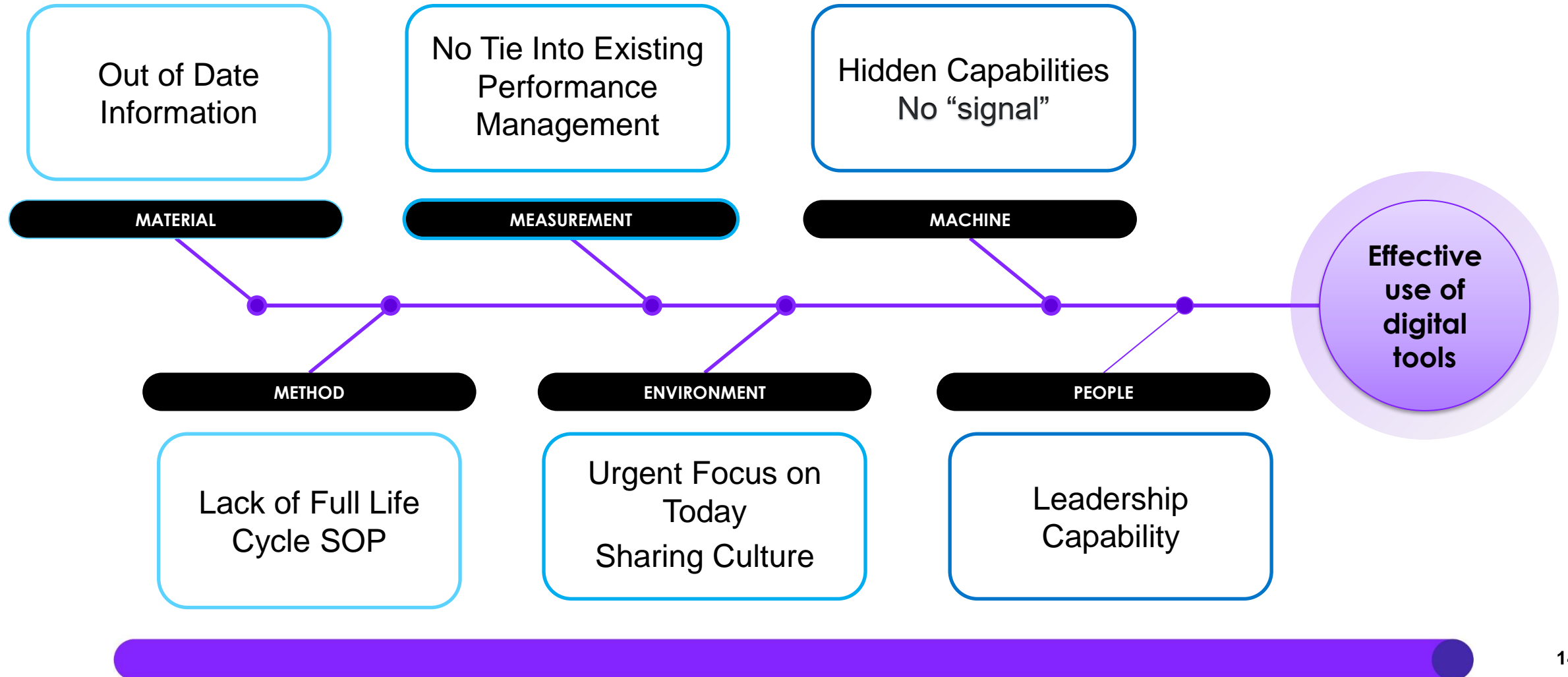   - Individual Manager
    - Personal Drive

Files

- **Baseline:** 456,229 files
- **Usage:**
    - Management Reporting
    - Procedures
    - Staff information

Why might this be a struggle?
Root Cause Assessment

Out of Date Information

No Tie Into Existing Performance Management

Hidden Capabilities No "signal"

MATERIAL

MEASUREMENT

MACHINE

Effective use of digital tools

METHOD

ENVIRONMENT

PEOPLE

Lack of Full Life Cycle SOP

Urgent Focus on Today
Sharing Culture

Leadership Capability

5S

Sort

Keep only what is required

Set in Order

Create a place for everything and put everything in its place
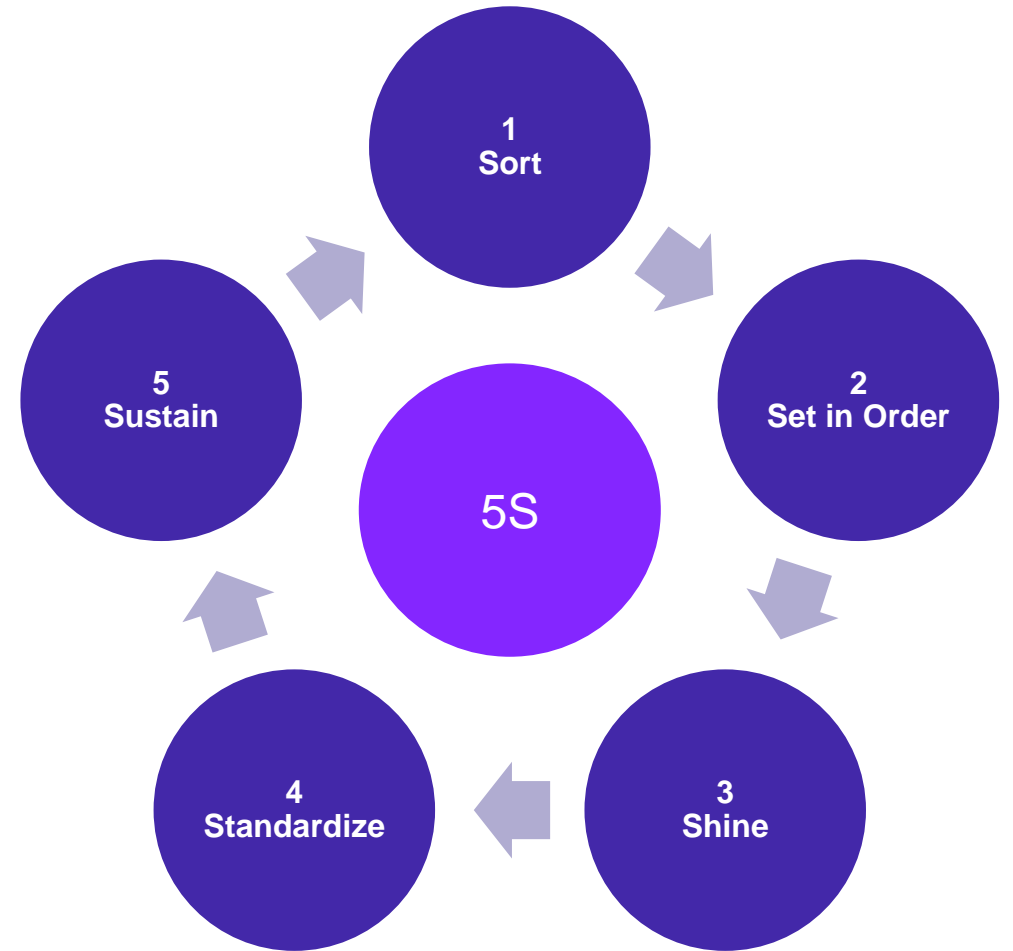
Shine

Clean and sweep the digital/physical workplace regularly

Standardize

Create a 5S organizational standard

Sustain

Build the structure to maintain the established standard

Sort Tactics

See the Waste

```
8    T:\Clms\03_Shared\Team Huddles\New Admin Mgr & CSA Team Huddle
     Notebook.onetoc2
                    12/10/2019 11:11:57 AM
9    T:\Clms\03_Shared\Team Huddles\New Admin Mgr & CSA Team Huddle
     Notebook.onetoc2
                    12/4/2018 3:35:03 PM
10   T:\Clms\03_Shared\Team Huddles\New Admin Mgr & CSA Team Huddle
     Notebook.onetoc2
                    1/25/2024 10:18:49 AM
```
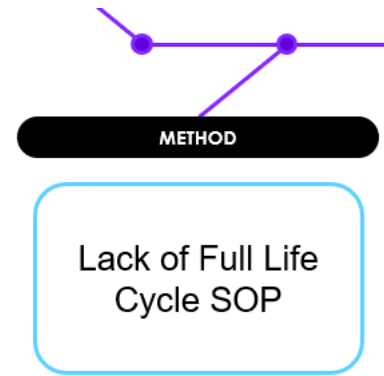
Hidden Capabilities
No "signal"

MACHINE
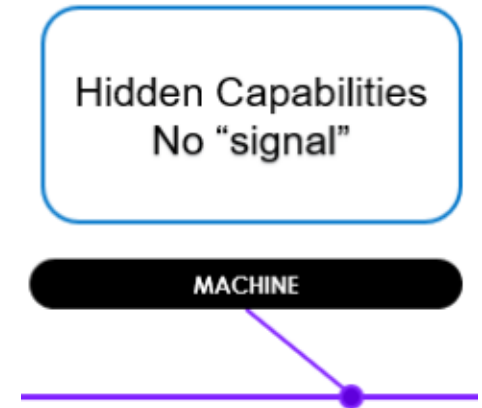
Remove the clutter

Green and Red Tags

"Move Slowly but Surely"

Oldest to Newest…

Set in Order Tactic
Key Information Assets

METHOD

Lack of Full Life Cycle SOP

Benefits:

Reliance on the same key information assets provides repeatability and consistency

Eliminates unique and orphaned data sources resulting from leadership changes

Removes key information assets at the right time

Weekly Assignment

Skills Matrix

Training Plan

Productivity

Vacation Schedule

Demand Forecast

Work Reviews

Digital Capabilities:

Search

Versioning

"The role of leadership"
Go and see

Leadership Capability

"Some of our OneNote's have not been touched for 5+ years, but I don't know how to delete them ."

"I'm never quite sure where to find the overtime document when I need to fill it in. Sometimes I just create a new doc since I can't find it on the t-drive."

"I made updates, but they didn't sync so I made my own copy"

"I'm nervous about deleting those files, even if it's been 10 years since someone last accessed them. What if I need to get to that information one day?!"
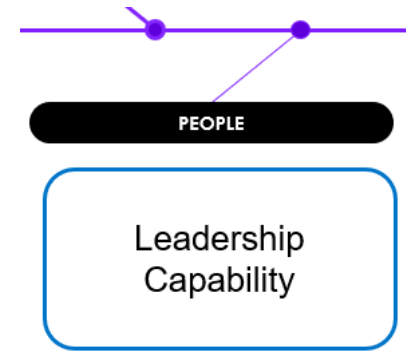
Skills

"Work together for the common good"
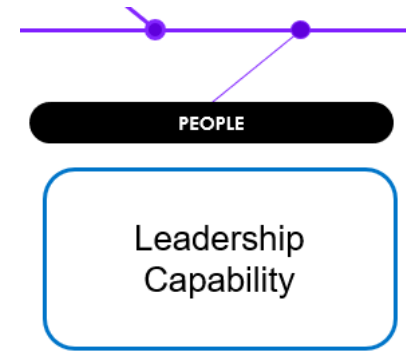
Role	Current Attitude and Behaviour	Typical Statement	Target Attitude and Behaviour
Manager	Feel free to create another copy on desktop	"I know where it is …"	Start with a shared copy to allow collaboration
	I'll save it with a date so I know my changes	"I want another copy in case there is an issue or problem"	Leverage versioning with a single shared copy
	I place everything in folders and directories using a system I understand	"I'm very organized…"	Add to the central library and use search
	Unchanged methods of conducting meetings	"I'm not technical…"	Embracing the new capabilities and approach to facilitate engagement online with team

Digital Skills

Build toward our target through shared learning…

… and maintain the standard

Current State

Target State

Breakout rooms ----------- 1 ----------- 3

Versioning ----------- 2 ----------- 4

Commenting ----------- 2 ----------- 2

View creation ----------- 1 ----------- 2
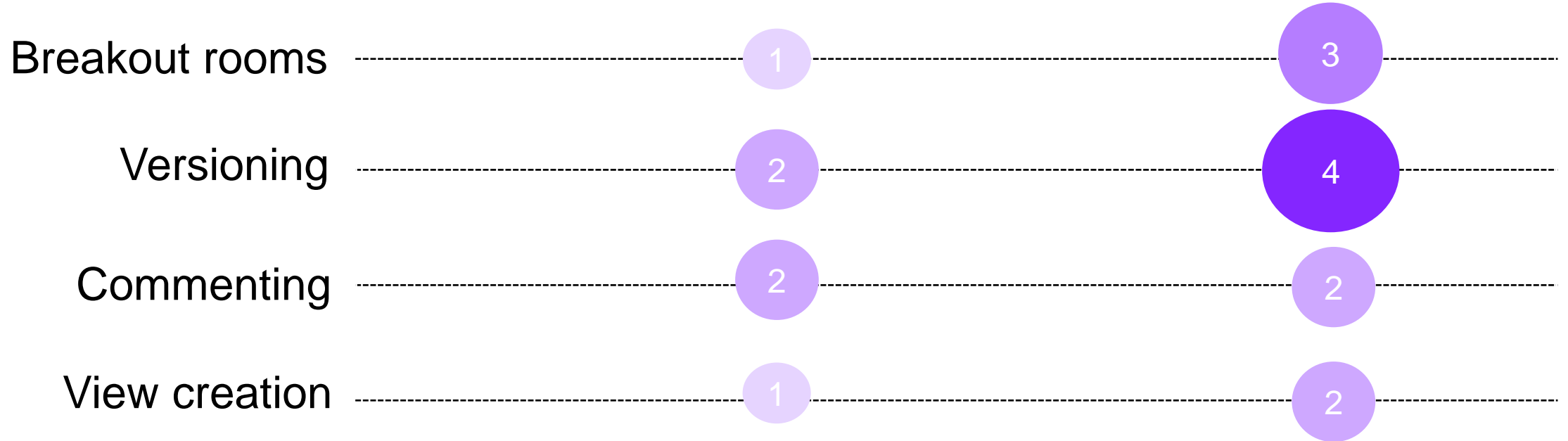
1 • Not aware / Not using

2 • Aware / Not using

3 • Aware / Using

4 • Using and promoting

How to stay out of the digital quagmire Sustainment Tactics

Making it part of the everyday rather than a "clean up"

- Event Driven - Offboarding process for leaders exiting Claims Admin
- SOP - Leader Standard Work
- Visual Management – Review by standard

Digital Workplace Results

"I can find what I need"

OneNote

- **Baseline:** 160 OneNote notebooks
- **Now:** 14 (94% reduction)

Key Information Assets

- **Baseline:** 93 KIAs
- **Now:**
  - Planning
  - Onboarding
  - Staff Skills

MS365 Knowledge

- **Baseline:** Low
- **Now:**
  - Team meetings
  - Best practices
  - Problem solving

Files

- **Baseline:** 456,229 files
- **Now:** 236,063 (48% reduction)

Application of Core Lean Practices

Tools
- Digital 5S
- A3
  - OneNote
  - Files
  - Key Information Assets
  - Leadership Skills

Lean Concepts

Technical Skills

Leadership & Respect for People

Team Ways of Working (Routines & Habits)
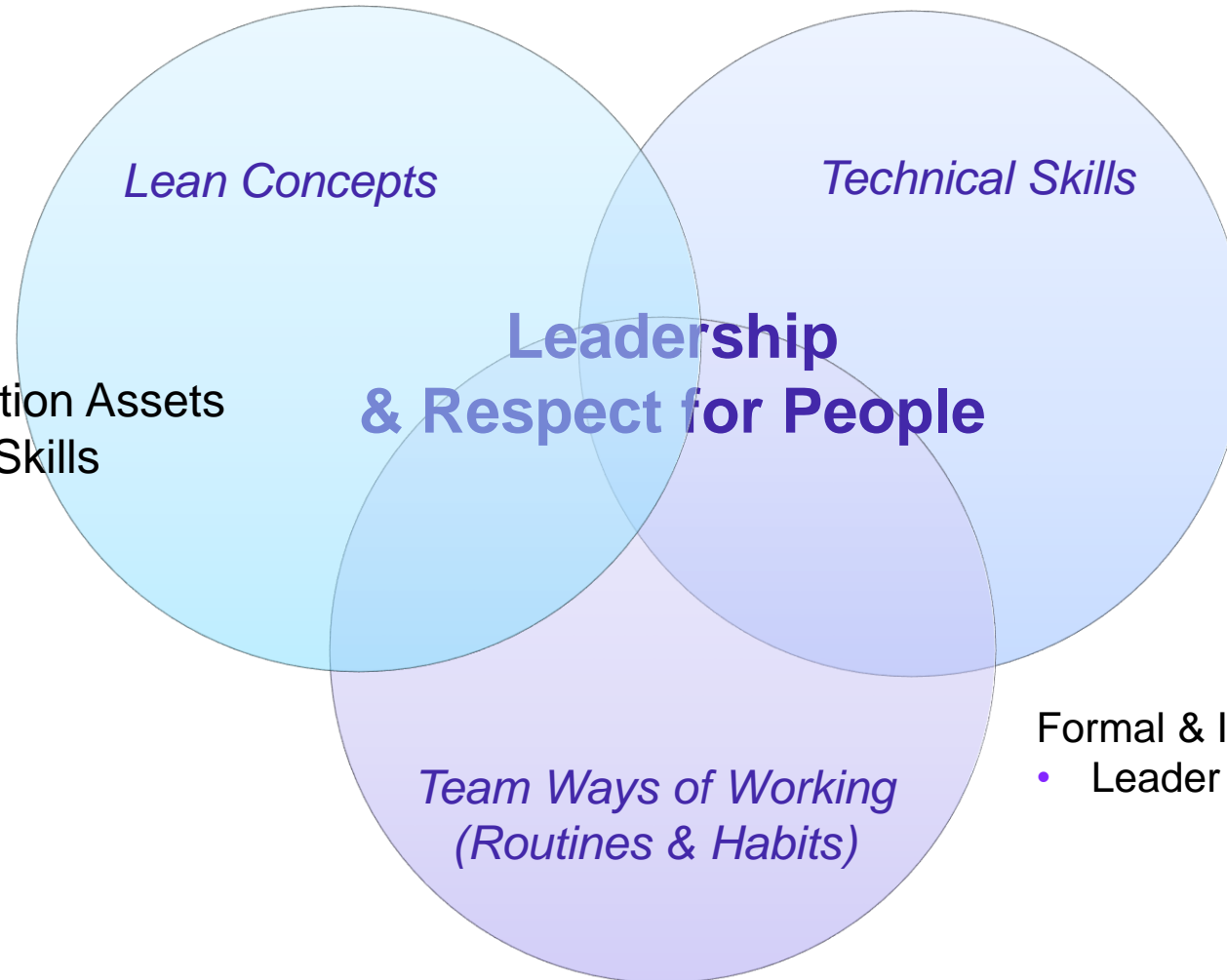
- Technical training/resources
  - Skills Matrix
  - Expectation

Formal & Informal Routines / Habits
- Leader Standard Work

General Playbook (based on PDCA)

1. Start with a **meaningful problem** and set an interim goal for the month/quarter.

2. Go assess and study the problem and root causes – go to the **gemba.**

3. Decide **what** scope to take on and **when** to proceed forward.

4. Design/set-up technology and **engage team** in how they will adopt new standard/practices (e.g. digital 5S)

5. Execute on plan and collect feedback/measure regularly.

6. Celebrate and learn from progress. Take a breather to allow standard to sustain. Sustain reinforcement until standard is a habit.

7. Schedule next iteration.

   - Keep iterating standard

   - Raise the bar on the goal

   - Select new problem/goal

Guiding Principle: Don't just lift and shift

What Problem to Start With?

Maturity Assessment on Fundamentals

A. Communication, notifications & e-mails

B. Files and document storage & retrieval

C. Calendars, Meetings, Minutes and Tasks

D. Skills and mindsets of the team

Build Engagement

Work with team to select what is **meaningful** them.

Poll: Which of these areas is the top pain point for your team?

Maturity Assessment Example

Each subject can be linked to pre-recorded training and recommendations best practices under different use cases.

Can also link to skills matrix.

Document Mgmt/Retrieval	MATURITY LEVEL				
	1	2	3	4	5
MS teams Channels	It's the wild west. Many channels without clear owners/purpose and some abandoned/inactive. No terms of reference for how the general channel is used.	-	General channel is actively used with clear ToR. However there is no clear standard for additional channels and their maintenance.	-	General channel is actively used with clear ToR. All other channels are active and supporting effective and necessary collaboration and have owners and ToR documented.
Sharepoint Sites	It's the wild west. Many sites without clear owners/purpose and some duplicative/abandoned/inactive.	-	All sharepoint sites are active, but don't relate to each other and may overlap in purpose/records retention.	-	All sharepoint sites owned by the team are part of a well defined eco-system and are actively maintained with clear owners.
Files	No standard for what files belong where in MS Teams vs other locations (network/local drive, onedrive, sharepoint etc) . Everyone does what they want.	Some standards but not written down or consistently followed.	Some standards are consistently followed but not written down.	Some standards are consistently followed and written down. Standards also include direction on retention timeframe.	All standards and retention policy are consistently followed and written down.
Collaboration	People maintain multiple copies and version with their own edits. Common work, even the final version, may be stored in multiple places and randomly change location with no communication.		Final copies are stored in single repository once with access given to people who need it. However, preliminary drafts worked on by the team may have duplicate versions and exist in multiple locations.		Final copies are stored in single repository once with access given to people who need it. Preliminary versions are kept in one place with access given to collaborators.
Permissions and access	No standard for ownership/accountability for managing permissions in place. No back-up if owner leaves team. Owners are not consistently aware of their responsibility.	Accountabliity associated with ownership of team is clear. Back-up owners in place. Permission standards not well understood and not reviewed.	Adhoc permission reviews by owners as issues arise	Permission standards are regularly communicated and reinforced but not regularly confirmed.	Permissions are regularly reviewed/updated by owners on scheduled routine.
Control	Manager has no line of sight to standard or compliance. Nothing written down or formally communicated. Not uncommon to have abandoned team/sharepoint sites or network folders.	-	ToR for repositories written down but not kept up to date/match current team practices.	-	Team alignment on standards of use and are fully documented and kept up to date. Team Sites are systematically decommissioned when not longer required.

Pivot to Action

PLANNING ASSESSMENT as at [Date]				Review as at [Date]
Where is the team today?		Where does the team need to be?	What is the course of action to close the gap in the next quarter ?	Did we complete what we commited to?
Current	Description	Interim Target	Action	Status @ End of Quarter

1

Start small.

Select 1-3 manageable issue(s) to tackle within defined timeframe.

2

Consider incremental interim targets that the team can see/feel the difference.

3

Celebrate the small wins.

Learn as a team.

Plan ahead for next iteration.

4

Is possible, engage enterprise communication support – contests, spotlights on successes, teams share experiences, shared templates and guidelines etc.

Partnerships to Scale Changes

Leadership development program

Continuous improvement/OpEx program

IT business enablement

The Prize: Excellence & Pride

"Regardless of the nature of your job,

there's always room for self-improvement and skill

development. By setting goals, seeking feedback, and

striving for excellence, individuals can enhance their

performance, even in seemingly mundane tasks."
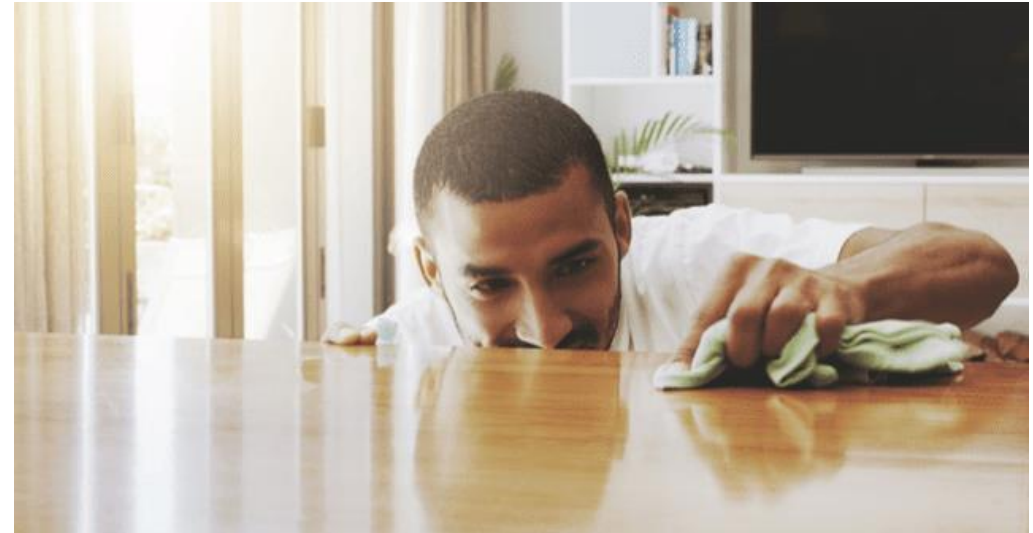
"Elevating the Mundane: The Power of Pride in One's Work", Paul Devlin

Questions?