

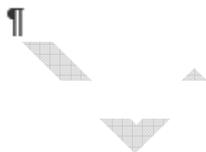
Unleashing innovation in your organisation

By David Parmenter

LOOKING

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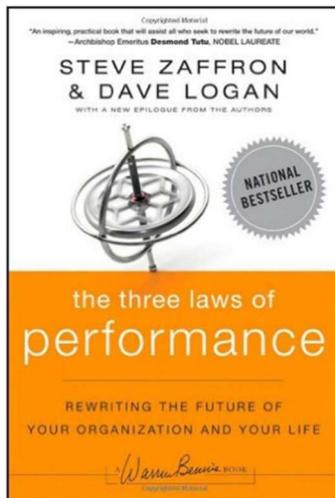
1. Barriers to innovation

Whilst we can never compare a small four-person start-up in San Francisco to a large government department or a multinational all of these organisations desire to be innovative.

For the small hungry start-up company working 80 hours a week, making innovation work is relatively painless as it is the only way they will survive. To the large multinational or the large government department the barriers to innovation are immense. The barriers include:

Institutional bureaucracy / lethargy being the default future	A large part of the problem is that the default vision of the future, is the status quo.
Bogged down by firefighting	Far too often talented resources are stuck in the revolving door. The processes that need to be challenged are the very ones that absorb all the time meaning no change can happen.
Untapped ideas	In so many organisations have talent staff live innovative lives outside their work environment. The key is to make a large organisation be as nimble as a small one.
Lack of understanding of magnitude of waste	Whilst there is a basic understanding of waste few people would be able to categorise the eight wastes that Kaizen attempts to address.
Lack of abandonment	Until an organisation embraces abandonment there is no hope for innovation. We need to free time for innovation through embracing abandonment.
Aversion to risk / a fear of failure (80-85% of all new fast consumer products fail) Neilson 2018	The paradigm shifters make it clear that it is up to the senior management team to make it clear that failing fast is often a step to success.

1.1. How the default future drives us



Steve Zaffron and Dave Logan have written a compelling book “The Three Laws of Performance” that explains why so many of these initiatives have failed. The first law is “How people perform correlates to how situations occur to them.” The writers examine the concept that the organisation’s “default future” which, we as individuals just know in our bones, will happen – will be made to happen. Thus, in an organisation with a systemic problem, the organisation’s staff will be driven to make initiatives fail, so that the default future prevails.

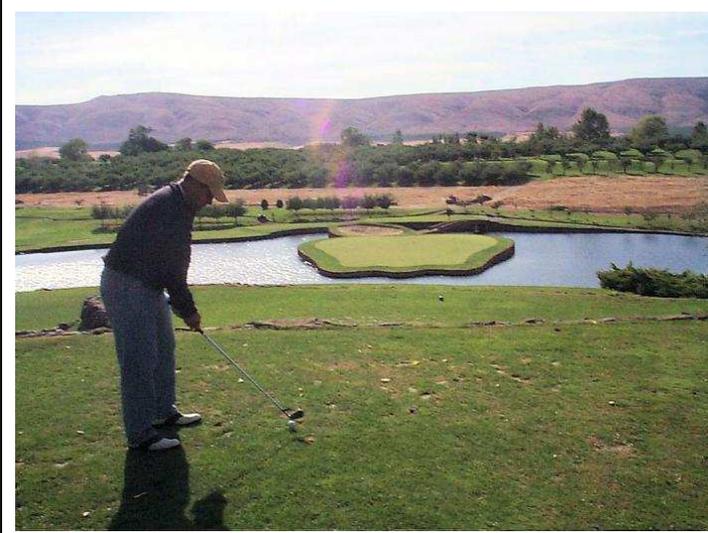
Daniel Goleman, of emotional intelligence fame, points out that the subconscious is a very primitive part of the brain, one that has not evolved for more than 100,000 years. If you place visions in your subconscious, it will work away at them and guide you in your waking hours towards those outcomes. Tony Robbins’ YouTube video The Magic of Visualization (Law of Attraction) Rhonda Byrne’s book “The Secret” and John Kehoe’s “Mind Power” explain further the power of positive thought.

Zaffron and Logan went on to say, “If you do not change the default future belief the more you change the more you stay the same”. The key to change is to recreate, in the organisation’s staff minds, a new vision of the future, let’s call it an “invented future”. More of this later in the selling change section.



Our default view can also radically limit our personal lives.

If we set off driving with a belief that parking will be a nightmare it surely will.



Likewise, if we say to ourselves don't go in the water, our subconscious will deliver the image you have planted.

LOOK INSIDE

2. A Perfect Storm

Never has there been a better time to unleash innovation in your organisation. There is a perfect storm that offers: an unprecedented amount of talented and entrepreneurial young people; accessible technology- many of it for free; and a colliding of ground-breaking knowledge which gives us a clear route forward. With the added advantage of customers who are accessible, around the world, because they are only a few clicks away from ordering.

There are two types of innovation:

1. Gemba Kaizen innovation which focuses on continuous improvement (Kaizen) in the workplace (Gemba).
2. Blue ocean shift innovation where an organisation moves away from the cut-throat, bloody red oceans of competition to the clearer, calmer and rewarding waters.

This working guide will penetrate into the great work of Jeffery Liker, *The Toyota Way*, Masaaki Imai author of *Kaizen* and his follow-up book *Gemba Kaizen* and show you how you can move towards Toyota's amazing achievement of 10 innovations, per employee, per year, worldwide.

The working guide will also go into the brilliant work of W. Chan Kim and Renee Mauborgne authors of *Blue Ocean Strategy*, and their follow-up book, *Blue Ocean Shift*.

The great paradigm shifters, Peter Drucker, Tom Peters, Jack Welch, Gary Hamel have also talked, for some time, about the significance of innovation and how to increase your odds of success. The key lessons are extracted and listed for easy absorption.

A major change of culture requires an understanding of the psychology of selling and leading change. John Kotter's eight step "selling and leading change" process have been further enhanced with Zaffron and Logan's *Three Laws of Performance* that offers a more in-depth look at the psychology of change.

3. Understanding Gemba Kaizen Innovation

The important use of Gemba “the real place” in front of Kaizen reminds us that we need to start in the operations. Kaizen stands for continuous improvement. The ten basic rules for practising Kaizen in the workplace were listed by Masaaki Imai in his book Gemba Kaizen¹ see Exhibit 3.1.

Exhibit 3.1: The ten basic rules for practising Kaizen

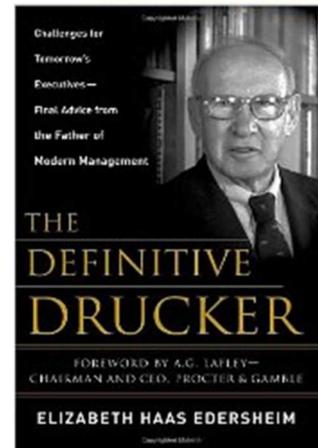
Challenge the old	Abandon conventional rigid thinking about how things should be done
	Think of how to do it, not why it cannot be done
	Question and abolish old, traditional concepts
Just do it	Do not seek perfection - do the improvements now
	Correct mistakes immediately
	There is no need to spend money on Kaizen
Use the wisdom of the crowd and research problems deeply	Wisdom is brought out when faced with hardship
	Find the root cause of a problem by asking 5 Whys
	Seek the wisdom of ten people rather than the knowledge of one
Never stop once started	Opportunities for Kaizen are infinite

3.1. Challenge the old

Past processes need to be constantly challenged to ensure they are relevant for current and future operations.

Importance of Peter Drucker’s Abandonment

From the time we were at kindergarten we have had a fear of ever admitting we were wrong. If I was to go into a reader's garage what would I find? Maybe an exercise machine that started off life in great excitement as we envisaged a leaner me. After a couple of weeks in the lounge it started its inexorable journey to the garage. There to rest under the dust cover for a day in the future when we would use it again, so we could say "I told you so."



In the world of commerce this trait is equally damaging. We will hold on to systems, keep going with projects, keep writing that report that nobody reads because to remove it would mean a loss of face. Let's get over it.

Management guru Peter Drucker who I consider to be the Leonardo de Vinci of management, frequently used the word 'abandonment'. I think it is one of the top 10 gifts Drucker gave us all. He said,

"Don't tell me what you're doing, tell me what you've stopped doing."

"If leaders are unable to abandon yesterday, they simply will not be able to create tomorrow"

"Without systematic and purposeful abandonment, an organization will be overtaken by events. It will squander its best resources on things it should never have been doing or should no longer do. As a result, it will lack the resources needed to exploit the opportunities that arise"

An organisation that embraced Peter Drucker's abandonment earmarked the first Monday of every month for "abandonment meetings at every management level." Each session targets a different area so that over the course of a year everything is given the once-over. This process would work well in the finance team except we should meet once a week to discuss at least two abandonments.

The act of abandonment gives a tremendous sense of relief to the finance team for it stops the past from haunting the future. It takes courage and conviction from the CFO. Knowing when to abandon and having the courage to do so are important leadership attributes.

I have included in the electronic media a book review of Elizabeth Haas Edersheim's *The Definitive Drucker*ⁱⁱ. Read the book for more on abandonment and other great advice. I consider this book one of the top 10 management books I have read. I hope, like me, you will become a follower of the great Peter Drucker.

The Importance of Challenging The Status Quo



In an interview, called “The Lost Interview”, Steve Jobs, was asked, “As a 22-year-old worth \$10m, and a 25-year-old worth \$100m, how did you get your business acumen?” He said that over time he realized that most business was pretty straight forward. He talked about when Apple had its first computerized manufacturing plant for the Apple II and the accountant sent Steve Jobs his first standard costing report. Jobs asked, “Why do we have a standard cost and not an actual cost?” The response was “That is the way it’s done”. He soon realized that the reason was the accounting system could not record an actual cost quick enough. When that was fixed, standard costing reports vanished.

In business Jobs believed that few in management thought deeply about why things were done. He came up with this quote which I want to share with you. I believe it should be on every wall and in front of every work station in the finance team work area.

“Your time is limited, so don’t waste it living someone else’s life. Don’t be trapped into living with the results of other people’s thinking. Don’t let the noise of other’s opinions drown your own inner voice.” Steve Jobs

I believe this quote should be on every wall and in front of every work station in the finance team work area.

3.2. Just do it

Nike utilised the phrase “Just do it” in a very successful marketing campaign. With a commitment into training staff about kaizen much progress can be made with little further investment.

The great paradigm shifters featured in the later section all emphasize the importance of piloting rather than writing proposals. Thus, quickly testing assumptions with targeted customers and failing fast and moving on where necessary.

3.3. Use the wisdom of the crowd and research problems deeply

James Surowiecki wrote that “a large group of people are often smarter than the smartest people in them.” Hence the term “wisdom of the crowd was born” . In other words, a group’s aggregated answers to questions that involve quantity estimation have generally been found to be as good as, and often better than, the answer given by any of the individuals in the group. Involving a “crowd” in innovation will have a major positive impact on the process.

Use the five whys rule to get to the heart of the problem

HOT Tip

Six sigma and Toyota have adopted “The five whys” to get to the root cause of a problem. It is like peeling the layers off an onion. To each answer to a why question you then ask, “Why is that?” The rule states that by the fifth why you will have located the real problem, and if rectified, a permanent benefit will flow back to the organisation.

3.4. Never stop once started

The ultimate goal for Kaizen is to match what Toyota have achieved. Ten innovations per year from every employee, in every country.

4. The four foundation stones for Kaizen

There are some foundation stones in kaizen that should be adopted.

- Muda (waste) elimination
- Housekeeping
- Visual management
- Adopting Time Saving Techniques (Adopting SCRUM meetings from the agile movement and value stream mapping)

4.1. Waste (Muda) elimination

There are three steps in waste elimination.

1. Understand the eight wastes and identify examples of each of these eight wastes in your operation.
2. Post-it sticker re-engineer your main processes where they will be some easy wins
3. Learn how to perform value stream mapping and apply it to all main processes.

The Eight Wastes that Need Tackling

In lean methodology, there are eight types of waste. These wastes are seen within the whole organisation. I have outlined the eight wastes below in Exhibit 4.1

Exhibit 4.1: The eight wastes that need tackling

Eight types of waste	Reasons why the waste occurs
Over-production: Building batches of products larger than the customers' immediate need.	This waste typically occurs because we want to increase utilisation of large and important machines, are worried about rejects and absenteeism so we produce more to be on the safe side. In just-in time systems being ahead of the production schedule is regarded as worse than being behind it.
Waiting: Production operators waiting because a machine has	Whilst operators being idle is easy to measure, it is more difficult when they

<p>gone down, or a component is not available. Or when the operators are simply monitoring the machine as it does its value adding task.</p>	<p>are looking busy. In one example in a German automotive manufacturer, the set-up time in the press shop was reduced from 10 hours a week to 3.5 hours.</p>
<p>Transportation: Moving materials around the factory. Any process that is physically distant from the main line should be incorporated into the line if possible.</p>	<p>Masaaki Imai points out a common sign of a problem with layout is the need for conveyor belts. He goes on to say, "The best thing a company can do with its conveyor belts is to sell it to their competition, or send it to them free of charge."</p>
<p>Extra processing: Processes that appear productive but are unimportant to the customer. Value stream accounting provides good guidance here. Do not include any costs and activities that do not add value to the customer.</p>	<p>There are many ways an organisation can have extra processing.</p> <ul style="list-style-type: none"> • Monthly reports that are prepared for accountability purposes but are not read or used by the recipient. • The majority of Excel spreadsheets that are a reprocessing of already recorded transactions. • The chart of accounts where it holds more than 50 codes for the P/I • Annual planning processes that take months and are useless as soon as the ink has dried. • Designing additional features into a product that the customers do not use e.g. many features in Excel are not used.
<p>Excess inventory: Having materials, components, work-in-process, and finished goods levels above the immediate need.</p>	<p>When an inventory level is high nobody gets serious enough to deal with problems like quality, machine downtime, and absenteeism, and thus an opportunity for Kaizen is lost.</p> <p>Also, with generally accepted accounting principles all finished goods carry prior months' overheads into the future periods these goods were sold. Carrying forward costs to future periods leads to additional costs hitting the P/L when inventory levels fall.</p>

<p>Waste of motion: Any motion of a person 's body not directly related to adding value is unproductive. While very evident in manufacturing environments it is of equal importance in all other environments.</p>	<p>I recently witnessed a classic waste of motion activity in a hospital. I was in the the emergency department of Wellington's largest hospital and my wife was having her blood pressure read. Because my wife's records could not be brought into the room the nurse, who was wearing protective gloves, had to write the temperature down on a scrap of paper and then transfer it to the file when she returned to her work station.</p> <p>There are many ways an organisation can have a waste of motion</p> <ul style="list-style-type: none"> • Disorganized employees who do not have all their tools with them on a site visit • Health workers double handling patient information • Office workers who cannot access previous work files efficiently
<p>Waste due to rework and rejects that have to be scraped: Rejects interrupt production and require expensive rework (processing again to correct faults) or have to be discarded.</p>	<p>Reports that have to be rewritten are effectively rework.</p>
<p>Unused employee creativity: Employee ideas having to hurdle many obstacles before adoption and therefore not being raised.</p>	<p>Based on Toyota, we would need to have 10 innovations implemented per team member per year before we could say there is no waste in this area.</p>

While some of these types of waste, appear at first sight, to only be relevant to manufacturing you can apply many of them into other sectors. Since, as Dr Jeffrey Liker points out, "Most business process are 90% waste and 10% value-added work" there is a lot of scope in this area.

Post-it re-engineer your main processes

Re-engineering can be a complex or a relatively easy task—the choice is yours. Many organisations start off by bringing in consultants to process map the existing procedures. This is a futile exercise; why spend a lot of money documenting a

process you are about to radically alter and when it is done only the consultants will understand the resulting data-flow diagrams?

Reengineering Your Frequent Routines

The first place to start is to Post-it reengineer your common routines in a workshop. This takes a full day and involves seven stages.

Stage 1 Invitation

Having set the date, ask the CEO to send out the invites for the workshop; see electronic media for a draft. The finance team needs to send out instructions, a week or so prior to the workshop, outlining how each team is to prepare their sticky notes.

Suggested attendees include all those involved in month-end, including accounts payable, financial and management accountants, and representatives from teams who interface with month-end routines (e.g., someone from IT, payroll).

Set up a schedule to ensure all the main teams have a unique colour of notes (see Exhibit 4.2).

Exhibit 4.2: Allocation of post-it stickers so every team has a unique colour

Team 1	Yellow
Team 2	Green
Team 3	Blue
Team 4	Purple
Team 5	Pink
	Etc

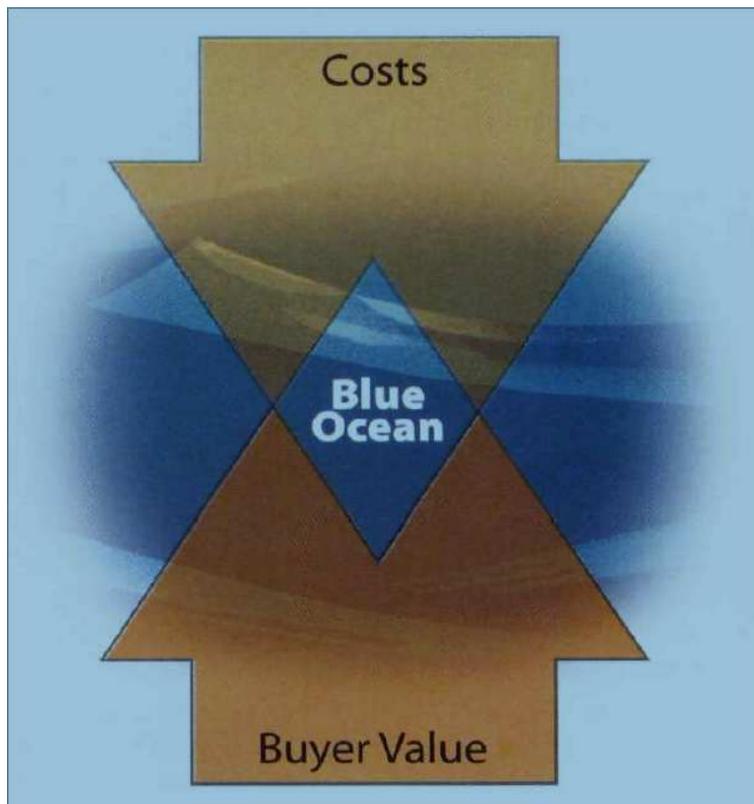
Stage 2 Stand-up Workshop around the Whiteboard

5. Blue Ocean Innovation

In the book the “Blue Ocean Shift” process, W.Chan Kim and Renee Mauborgne have outlined a very practical five step process for moving from the bloody red oceans of competition to the clear, calm and rewarding blue oceans.

You know when you are there as there is little or no competition, customers have a higher perceived value and are thus fans; costs are considerably lower, as shown in Exhibit 5.1.

Exhibit 5.1 The desired outcome from a blue ocean shift



Kim and Mauborgne are very clear about their advice. They offer us these foundation stones for a blue ocean shift process, see Exhibit 5.2.

Exhibit 5.2 The foundation stones of a blue ocean shift process

<p>Focus on new demand rather than fighting over existing customers</p>	<p>This is a zero-sum game. In New Zealand the power companies knock on your door offering great deals to switch. It is an endless circle which the main beneficiary is the clever consumer who players them off against each other.</p>
<p>Do not take existing industry conditions as givens</p>	<p>“It is because they say it is”, All great products or services start by challenging this statement. Invariably nobody has asked the customer. The status quo is assumed by the management who have received</p>

	large bonuses from the existing environment and are not in a frame of mind to look for new possibilities.
Have a mantra that noncustomers' come first	Peter Drucker coined the phrase "non-customers". By focusing on all those customers who you would like to have but have not yet engaged, an organisation can challenge the past and look for new opportunities and new channels to reach this untapped potential.
Do not seek to beat the competition- aim to make them irrelevant	Fighting over the same customers is a meaningless task. You want an offering where your customers are fans. No amount of enticement will change their purchasing habits. Apple has succeeded with this time and time again.



Cirque du Soleil is an example of blue ocean thinking. Dance, opera and circus were merged together into an amazing new spectacle where there were few competitors. The added advantage was that all their performers are treated equally as they had moved away from billing star performers with their high costs and associated demands.

The five-step model

1. **Get started:** This step involves selecting a blue ocean shift (BOS) facilitator, who will be an outside consultant, selecting the core in-house BOS team, and training them. Selecting some mentors for the in-house team. Mapping out your current offerings in the pioneer-migrator-settler process.
2. **Understand where you are now:** This involves the BOS facilitator running a two-day workshop with the extended BOS team. The Strategy canvas is drawn. Expect this to take two-four weeks to schedule.
3. **Imagine where you could be:** This involves the extended BOS team doing field work and meeting up in a one day workshop where they share their findings on the buyer utility matrix and ascertain the magnitude of the three types non-customers' demand ("soon to be non-customers", "refusing non-customers" and "unexplored non-customers".)
4. **Find how you get there:** This involves the extended BOS team doing fieldwork and meeting up in a one-day workshop where they share their findings on the six possible paths, complete the "eliminate, reduce, raise and create key features" exercise and outline a number of possible new offering solutions.

5. **Make your move:** This involves the extended BOS team presenting the “new offerings” in a contestable environment (a blue ocean fair), where the chosen audience get to hear the various options and in a workshop environment explore their options .get to add their contribution and then vote for the best offerings from their perspective all on the same day. The executive team then makes their decision. Piloting of the new product or service commences rapidly using carefully chosen responsive customers / regions.

5.1. Step 1: Get started

This step involves selecting a BOS facilitator, who will be an outside consultant, selecting the core inhouse BOS team, and training them. Selecting some mentors for the inhouse team. Mapping out your current offerings in the pioneer-migrator-settler process. Expect this to take 4-6 weeks of elapsed time.

Kim and Mauborgne advocate that you need to map today to see tomorrow, by looking at the existing offerings. It is a great wake-up call and gives an indication of the impending doom is action is not taken. They believe products /services fit into three categories:

Settlers - These products compete by offering incremental changes or special pricing. In my supermarket you see competing electric tooth brush manufacturers offering special deals at least six times a year. You therefore would never wish to pay the full price. Unless the industry is growing, and profitable settlers have a little or no prospect for growth.

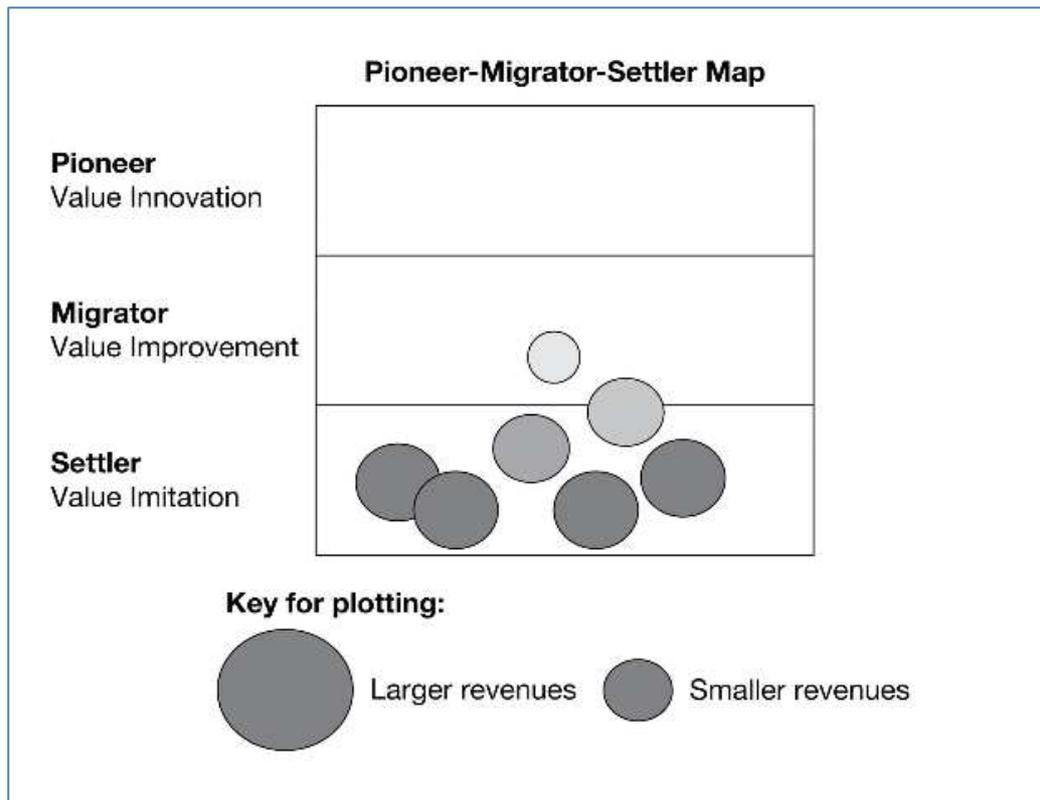
Migrators – Offer a value improvement over competition. Customers are less price sensitive as you are best in class.

Pioneers – These products don't have customers they have fans. They offer unprecedented value in the customer's mind. There is little price sensitivity. Offer considerable potential for growth providing the fan base is big enough.

They call this process the pioneer-migrator-settler map, see Exhibit 5.3.

HOT TIP

Exhibit 5.3 The pioneer-migrator-settler process



In this PMS map the organisation is strategically vulnerable because it is living on past success. With organisations with blue ocean offerings you would see small circles appear in the top row.

How to plot your PMS map

1. Purchase enough books so that each member of the Blue Ocean Shift team has one. Purchase the BOS suite to access the exercise templates from www.blueoceanshift.com/Exercise/Templates.
2. Prepare the existing products and services and rank the circles according to the current revenues over the last rolling twelve months. Give a code to each product/ service. Use product groups to limit circles to no more than 20.
3. Select a team comprising a mix of inhouse and external attendees. The mix is important as there will be a tendency for departmental heads to move their products higher up the list, they will rightly fear if their key product sits in the Settler row it may be left out to die.
 - a. Experienced staff who liaise with your customers
 - b. Experienced staff from stores who sell you products alongside your competition
 - c. Sales staff who have been working in the sector for over five years
 - d. The likely full-time members of the blue ocean team

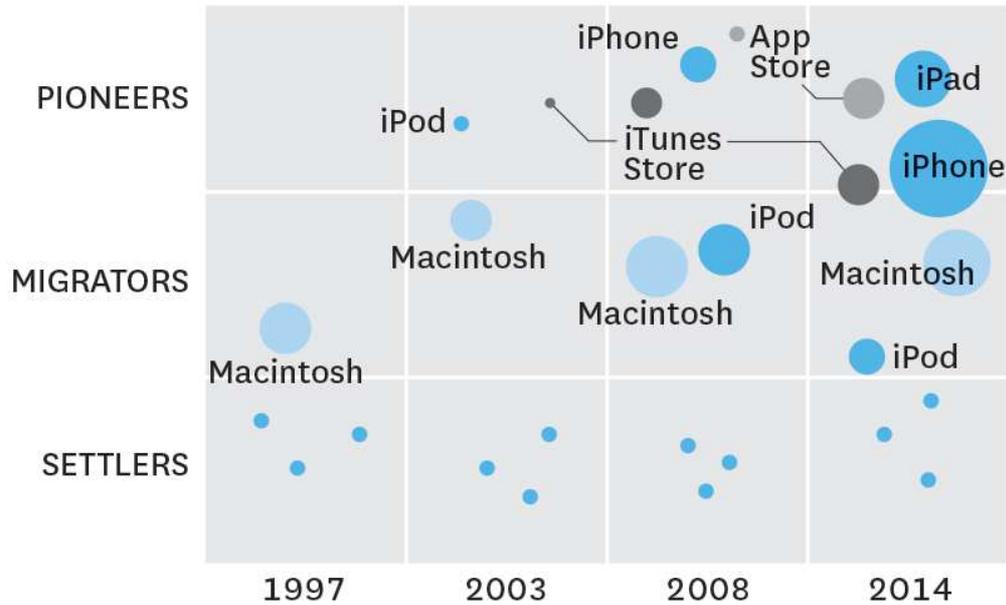
- e. The CEO and two to three other members of the executive team
4. Run a short training session covering the definitions and the rules around drafting the PMS map. The rules are:
 - a. The rankings should be based around the customer's view and not the ranking within the organisation.
 - b. The size of the circles is relative to the existing organisations' revenues. The product with the largest circle will have the largest revenue.
 - c. A pioneer product can be in two types; a "value pioneer" or a "technology pioneer". The latter is unlikely to grow unless a new unexpected market is found for the technological breakthrough.
 5. Run a small workshop, breaking the attendees in to at least three groups with each group having no more than five staff. Using Microsoft products as a case study ask the teams to draft a BOS map for 2014 showing the position of the App store, iPhone, iTunes, Macintosh, iPod. Discuss their different versions and come up with a proposed collective view. Now compare to Exhibit 5.4. Discuss reasons for differences. For teams where the mapping was very different move some staff from the stronger group.

HOT TIP

Now using the company's products/ services get the groups to map the predetermined circles. Where there is a marked difference between teams get them to present their case to a panel comprising of The CEO and two to three other members of the top team. This challenge can occur in another room while you are debating the final position of other products.

6. The panel present the final picture to the group and the BOS team will present it to senior management and department heads in subsequent meetings.

Exhibit 5.4 The pioneer-migrator-settler process



Establishing a BOS Project Team

Here are some guidelines for a BOS team selection:

<p>Full-Time Responsibility</p>	<p>In most of the implementations I have observed, the project leader’s full-time commitment has been compromised. In every case this has delayed and put the project on the back foot. For organisations with over 250 full time staff the BOS team leader should and must be full time. In small organisations this duty must be at least half the workload with much daily operational activity reassigned so that the incumbent has a chance to focus and create some momentum in the project.</p>
<p>In-House Appointment</p> <div data-bbox="220 1559 400 1659" style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>HOT TIP</p> </div>	<p>Peter Drucker said, “Never give a new job to a new person.” We need to appoint an in-house person as the BOS team leader. Someone who is well respected in the organisation, has had success implementing projects and has a pile of “I owe you” favours which they can call upon when help is required. Staff, who are concerned about the change, are more likely to support the BOS initiative when it is led by a trusted in-house appointee.</p>
<p>Direct reporting line to the CEO</p>	<p>The person holding this position would report directly to the CEO, as befits the importance of the project to the future of the organisation.</p>

Writer's Biography



David Parmenter is an international presenter who is known for his thought provoking and lively sessions, which have led to substantial change in many organisations. He has spoken in 31 countries and in most continents in the world. Besides delivering in-depth workshops he has been a keynote speaker for the IBM Finance Forum, The World Capability Congress, TEC Malaysia, and Profiles International Romania.

David is a leading expert in ; the development of winning BOSs, replacing the annual planning process with quarterly rolling planning, quick month-end processes and making reporting a decision based tool.

John Wiley & Sons Inc have published his four books, including “The Financial Controller and CFO’s Toolkit”, “The Leading-edge Manager’s guide to success – strategies and better practices”, “Key Performance Indicators – developing, implementing and using winning BOSs” and “Key Performance Indicators for Government and Non-Profit Agencies”.

David has also worked for Ernst & Young, BP Oil Ltd, Arthur Andersen, and Price Waterhouse. David is a fellow of the Institute of Chartered Accountants in England and Wales.

He has written over 50 articles for the accounting and management journals. He has won two ‘article of merit’ awards from the International Federation of Accountants. (2007 and 2009). His published articles titles include: “*Quarterly rolling planning - removing the barriers to success*”, “*Throw away the annual budget*”, “*Beware corporate mergers*”, “*Implementing a Balanced Scorecard in 16 weeks not 16 months*”, “*Convert your monthly reporting to a management tool*”, “*Smash through the performance barrier*”, “*Is your board reporting process out of control?*” “*Implementing winning Key Performance Indicators*”, “*Quick month end reporting*” “*Conquest leadership- lessons from Sir Ernest Shackleton*” “*Should we abandon performance measures?*” “*Putting the finance team on the map*” etc.



BOS Project Team Checklists and Questionnaires

The checklist in Exhibit 10.1 can be used as an aid to the BOS project team, ensuring that important tasks are not overlooked. The BOS team, with the mentors, should amend this checklist before use to suit the organisation and desired approach.

EXHIBIT 10.1 Establishing a “winning BOS” project team

1. Have a maximum of four staff been appointed to the BOS core team?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Are at least half of the BOS team working full time on the project?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Is there a representative from the following groups included in the BOS project wide team?	
HR	<input type="checkbox"/> Yes <input type="checkbox"/> No
Training	<input type="checkbox"/> Yes <input type="checkbox"/> No
Marketing	<input type="checkbox"/> Yes <input type="checkbox"/> No
Finance	<input type="checkbox"/> Yes <input type="checkbox"/> No
IT	<input type="checkbox"/> Yes <input type="checkbox"/> No
Public relations	<input type="checkbox"/> Yes <input type="checkbox"/> No
R&D	<input type="checkbox"/> Yes <input type="checkbox"/> No
Sales	<input type="checkbox"/> Yes <input type="checkbox"/> No
Call centre	<input type="checkbox"/> Yes <input type="checkbox"/> No
Store floor	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Has the BOS team received all designated training?	<input type="checkbox"/> Yes <input type="checkbox"/> No

5. Has the SMT to step aside from BOS's project team responsibilities?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Are BOS project team members a balanced mix of oracles and young guns?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Has the project team developed their intranet page to include:	
• Photos, CVs, interests, contact details of the BOS team members?	<input type="checkbox"/> Yes <input type="checkbox"/> No
• Useful BOS reference material (articles, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
• Contact details of all the business unit coordinators?	<input type="checkbox"/> Yes <input type="checkbox"/> No
• Implementation programme and details about each step?	<input type="checkbox"/> Yes <input type="checkbox"/> No
• A forum for sharing ideas, answering questions?	<input type="checkbox"/> Yes <input type="checkbox"/> No
• Progress reports	<input type="checkbox"/> Yes <input type="checkbox"/> No

The questionnaires in Exhibit 10.2 and 10.3 are to be completed by the proposed BOS team members and their peers and managers. Training gaps that are highlighted will need to be addressed before the project gains too much momentum.

BOS Team Applicant Questionnaire

Exhibit 10.2 BOS Team Establishment Questionnaire.

It is important that you answer these questions honestly so that any training gaps can be rectified quickly. Comments are an especially helpful part of the feedback process. Please take time to make comments as specific as possible and include examples where appropriate.

Please return no later than by e-mail to _____.

1. Have you ever worked with key performance indicators (BOS) on a daily or weekly basis?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Are you prepared to work full time on this project?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Are you prepared to set aside at least 16 weeks for interviews, site visits, liaison with BOS facilitator and in-	<input type="checkbox"/> Yes <input type="checkbox"/> No

house coordinators, research, analysis, presenting findings, making recommendations etc.?	
4. Have you had experience at	
▪ Problem-solving?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Running workshops?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Information display and charting?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Delivering presentations to the SMT?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Interviewing?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Completing large implementation projects?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. What is your skill base?	
▪ Are you a self-starter?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Have you demonstrated innovation in the past?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Have you advanced communication skills?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Are you an “active” listener?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Do you have a good track record in finishing projects you start?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Are you able to maintain a big picture focus while working on a project?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪ Do you have the flexibility at home to be able to work overtime at critical times?	<input type="checkbox"/> Yes <input type="checkbox"/> No

What are the three main strengths you bring to the BOS project team?

What are your three main “skills and experience” gaps?

BOS Team 360-Degree Questionnaire

Obtaining a 360-degree feedback on the short-listed team members will be most valuable in assessing their strengths and weaknesses. This questionnaire (see Exhibit 10.3) should be completed by their manager and up to five of the peers they work with.

Exhibit 10.3 BOS Team 360-Degree Questionnaire

_____ has been short-listed for the team. It is important that you provide an unbiased response about _____’s experience and skills so that any training gaps can be rectified quickly.

Comments are an especially helpful part of the feedback process. Please take time to make comments as specific as possible and include examples where appropriate.

Please return no later than by e-mail to _____.

1. Has _____ demonstrated problem-solving skills?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Is _____ calm when in a crisis or under pressure?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Is _____ proficient at writing clear and concise reports?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Is _____ adept at delivering thought provoking presentations?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Has _____ competent interviewing skills?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Has _____ demonstrated project management skills?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Is _____ a self-starter?	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Has _____ demonstrated innovation in the past?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Does _____ have advanced communication skills?	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Is _____ an able listener?	<input type="checkbox"/> Yes <input type="checkbox"/> No
11. Does _____ have an expert track record finishing projects s/he starts?	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. Is _____ a good team player?	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Does _____ work overtime to meet agreed time frames?	<input type="checkbox"/> Yes <input type="checkbox"/> No

What are _____'s three main strengths?

What are _____'s three main "skills and experience" gaps?

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ⁱ Masaaki Imai, Gemba Kaizen: A Common Sense, Low-cost Approach to Management, (McGraw-Hill 1997)

ⁱⁱ Elizabeth Haas Edersheim, The Definitive Drucker: Challengers for Tomorrow's Executives — Final Advice from the Father of Modern Management, McGraw-Hill, 2006.

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