

THE SEVEN PRINCIPLES OF EFFECTIVE TRAINING

Principle One: Inspire First—Then Inform.

Everyone has come across great teachers. And what makes them *great*? Great teachers inspire us to learn—and then they teach us. And that's what you must do: Inspire first—then inform.

As we see it, your job is to complete three important tasks. The first is to *inspire* people to learn. The second job is to *teach* people the steps of the 5S+1 methodology. Your third task is to *support* people as they apply their new learning in their own work areas.

This is the way in which associates gain the knowledge, skill, and confidence they need to become great visual thinkers—and therefore great visual implementers.

Principle Two: Everyone Gets Trained.

At QMI/Visual-Lean Institute, we are not in favor of representative training.

By *representative* training we mean that only a few people from each targeted area are sent to the training. The rest remain behind. We want everyone trained, in as close to the same time as possible.

We say a great deal about this on the *Audio Training* (audio CD 1) that came with your system. Here's a reminder.

In our experience, *representative* training almost always creates the perception of an elite. Intended or not, the small group that gets trained is often seen as either: (a) being favored by management; or (b) knowing more (or thinking they know more) than those who stayed behind and kept the production going; or both.

The result? A lot of mis-understanding and resentment on both sides. Not a great way to launch an exciting new improvement initiative, is it? The journey is over before it has genuinely begun.

But that doesn't mean you have to train everyone at once. In fact, attempting a total-plant, simultaneous roll out is yet another recipe for almost certain failure.

Instead, start small—one to two areas, tops. Say, eight to twelve people. If yours is a three-shift operation (or more), that may mean you are able to train only one department. If overtime is not an option, it may also mean that you'll need to schedule a training session for each shift, including the third (or graveyard) shift—and come in to conduct it.

The requirement is this: Everyone in a single work area gets trained in as near to the same time as possible (within the same week).

There's another benefit to starting small. You are new to the approach and to the material. You yourself are in training. You need more modest goals (even if you are an experienced trainer) so you can build your own knowledge, understanding, skill, and confidence.

Note A. Make sure to alert management on the group size you feel comfortable training so they factor that in as they select target areas through the Laminated Map.

Note B. Consider conducting a series of short *Visual Workplace/Visual Order Awareness Sessions*. The purpose of such sessions to introduce people to the basics of visual information sharing and 5S+1: *Visual Order*, and to the roll-out plan.

Many companies find it helpful to show some DVD/tape footage during such sessions. Consider excerpts from the Overview module and/or DVD/tape VI (b) (case studies).

Also think about showing either or both of these in your cafeteria to increase the support and excitement about 5S+1 and *Workplace Visuality*.

Principle Three: Make the Training Room Safe.

For any learning to happen, you must make the training room safe—a safe place for learning.

That means making the training environment safe for everyone—for people you like to be around and for those who may give you a hard time. (By the way, that “hard time” is usually a sign that that person does not feel safe.)

A good part of creating safety is smoothing out the playing field so that everyone can be heard—and everyone can taste some measure of success.

The guiding principle here, as it is through the *5S+1: Visual Order* process, is: “The first S is for Spirit.” Said differently: “Respect everyone. Respect the individual.” Do this and safety follows.

This may take a little while or a long while. Either way, model the principle consistently—show people respect *no matter what*—and you will convince folks through your own behavior that you mean it. And they will start to relax.

As they relax, folks begin to express themselves, explore their thinking, and then come up with ideas. They get creative. They get excited. And that creativity gets contagious. It spreads. Person by person.

You made it safe—and that inspired people to take a chance.

Principle Four: Get and Keep Your Supervisors On Board.

Our approach at QMI to *5S+1: Visual Order* focuses squarely on associates. Yet your supervisors are also indispensable to that and the success of the implementation. It is vital that you get and keep your supervisors on board.

This will not be as critical if your company has already trained supervisors to serve as coaches—or if high-performance or self-directed work teams are already in place.

It will be critical if your company is in the process of making the transition from a traditional */command & control* management approach to empowerment.

When we train, supervisors of the targeted areas are required to attend all training sessions and observe (and eventually conduct) all Blitzes.

We also strongly recommend that every manager and supervisor in the company watch all DVDs/tapes as soon as possible, whether their area is part of the formal training or not. Competent, easy-to-access supervisory training is one of the main reasons we created this DVD/tape system in the first place. Your management staff must understand the nature of the change if they are to support it. They must also understand its underlying values, principles, concepts, and methods.

Note: Contact QMI if yours is a large company and you know people will be challenged to share the same set of DVDs/tapes. We offer a lease/loan option for temporary access to additional sets of DVDs/tapes so supervisors and managers can view the series in close parallel and therefore more quickly.

Your company has already demonstrated its intent to improve through Visual Order when it published its official *Improvement Time Policy*. That was the signal to every manager and supervisor that continuous improvement was a part of their job description.

But here's the trick: supervisors are asked to keep a *low profile* during training sessions.

This low profile is in keeping with the *I-driven* approach so fundamental to the success of Visual Order. Specifically, supervisors (and managers) are asked not to supervise improvement activity during or between training sessions. They are asked not to exhort, demand, request, require, urge, motivate or even expect associates to get on board with visuality. They are asked simply to observe and not to make “it” happen.

In not doing those things, supervisors and managers are actually helping those same associates make the switch from *passive* inattention to *active* personal engagement.

To many supervisors, who are almost always by nature action and results oriented, these instructions seem tantamount to asking them to be all but invisible and all but mute. Yet, this is part of the pathway to helping supervisors switch from being the so-called “police” to becoming true coaches of continuous improvement.

Most supervisors interested in learning to be coaches usually also have to make some change in their own personal and professional approach—an approach that may have seemed to have worked perfectly well—at least up to now....

Specifically, supervisors are asked not to *manage* the process or the people in the usual sense of the term. Instead, they are advised as follows: “The most helpful thing you can do right now to support the roll out is this: do nothing. Don’t suggest. Don’t ask. Don’t answer.

In fact, we would prefer (and we don’t mean to sound rude in this) for you not even respond when asked a question—except to ask another question, such as: “Well, what do you think?” “What would you do?” That is, if a supervisor must respond, respond *through questions*. Or he/she can simply say, “Gee, I’m not sure....”

Some supervisors find this request odd or even offensive. Yet, we urge you to convey this important approach to each supervisor in the targeted areas.

To balance that, also make sure you meet with supervisors regularly and often. Create an open forum for discussion and issues. Bring in your Coordinator and Lead Team as partners. Keep open, keep going, and keep giving these supervisors lots of credit for their effort.

In many companies, when you implement workplace visuality, you are engaged in ground-breaking/myth-breaking work. Supervisors deserve our thanks, support, and endorsement for their efforts. And they must step aside, temporarily, to allow the shift they have been seeking to take place—the shift to an empowered workforce.

Principle Five: Learning, Change and Improvement Take Time.

Our implementation approach includes teaching and adopting a set of behaviors that may be different from those found in other improvement initiatives—different behaviors from associates, supervisors, management and maybe even from you.

Making that switch takes time. How much time?

Well, for yourself personally, count on a minimum of two hours a week, outside of the training session, for your own preparation, tasks, and follow up.

And how much time for the first implementation cycle? Figure three to six months. Why the range? Because the depth of the required change depends on—well, on so many factors:

- The size of your training group
- Production demand
- The amount of improvement time allotted for visual activities
- Your own comfort level with training, facilitating, and watch dogging
- Employee turnover rate
- Supervisory turnover rate
- Your company’s history of improvement initiatives, prior to the launch
- Management resolve

All that (and much, much more) gets rolled up into the great catchall—your company’s level of organizational readiness. So the conversion that you seek will take some time.

Principle Six: Keep Going/Keep Learning.

As you will soon learn (if you haven't already), the Visual Order process focuses on three outcomes that may surprise you.

- First: that your teams achieve a *Visual Order Showcase* in at least one of the areas targeted for visual improvement. Why? Because a showcase inside your plant will inspire people about what that outcome and what its benefits look like—and inform them about how it is achieved in your facility.
- Second: that your teams achieve concrete, bottom line results—in order to prove that workplace visuality (and Visual Order to begin with) has a direct, measurable impact on Motion (corporate enemy #1).
- Third: that your teams, you and the organization learn—learn about the process, learn how to implement, learn what comes easy and what's hard, learn about people, learn about themselves/yourself, and learn about visuality.

Associates learn in the training session and then during the action assignment at the end of each session...learning through doing. And you will learn by teaching it—and coaching.

There are many fine points to effective 5S+1 instruction and a successful visual roll out. We touch upon many of them in this *Guide*. And there are more. To further your understanding:

- Consider attending one of our public seminars on the visual workplace or one of our special training of trainers. A lot will come clear as a result.
- Consider visiting a plant that is further along than yours on its journey to a visual workplace. We call such a company a *vision place*. There may be one in your neighborhood.

Contact us for suggestions or check our websites:

- www.visualworkplace.com
- www.VLinstitute.com

Principle Seven: It Takes a Village.

There is a tendency for folks involved in improvement efforts to get *heroic* in the wrong sense of the word. They sometimes try to carry on the effort alone, on their own shoulders. That's not much fun, and it's usually not very effective.

You are the instructor, the trainer. Please partner with the Visual Workplace Coordinator and her/his Lead Team. Use them as a resource and a support. That's what they are there for.

Get other folks on board as trainers, if only part-time. Let them back you up. Let them sit in as coaches on labor-intensive exercises, such as *S4 Mapping*. Share the learning. Share the teaching. Share the experience.

When two or three other people learn the training ropes, they can pinch hit for you, team-teach, and/or take on some of the many behind-the-scenes tasks. Steering Team members are often a splendid training and coaching resource. Extra capacity is particularly important if your plant has multiple shifts. Who is going to handle third shift? Will you do that, too? And if yours is a four or five-shift operation, will you do the weekends as well?

Think about it. Don't try to do it alone. You'll get tired, fed up, burnt out—and fail for all the wrong reasons.

With those seven principles stated and understood, let's move on to a discussion of the physical learning environment and related matters.