

USAF Career Field Manager and Training Developer Continuous Process Improvement and Innovation

# CPI<sup>2</sup> Simulation

## Experiencing an Environment of CPI<sup>2</sup> Support

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Eagle Harbor Solutions  
Total Systems Development

6th Cohort  
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# Chapter Three: CAPDCA

## Do the plan and Check on milestones and metrics

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### In this Chapter

This chapter covers the work of performing the activities laid out in the plan and observing to make sure that the plan's milestones and metric goals are being met. The two are closely related and performed at the same time.

### Activities

- WBY Case Study for DC
- WBY Do and Check exercise
- Air Force application discussion

### Why it is important (So What?)

- All activity is connected to commitments made in planning
- This is the discipline of following through on commitments
- These are the activities that lead to achieving the vision set by leadership
- This is where accountability for results happens
- Outcomes lead to opportunities for coaching and development

## The Mindset for Do/Check

- The plan is a standard, so follow it explicitly
- Discipline is required in execution
- Any deviation from the plan needs to be negotiated but it is not easy
- Check will use formal and informal reviews
- Create a consistent pattern of monitoring

## Keys

- Achieving discipline in implementation
- Connecting the checking to accomplishing the goals
- Developing individuals using the real situation
- Having the patience to allow members to learn from their mistakes

## Review of Chapter 2

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### **Bottom Line**

Planning is a required element of a CI environment. It is the place where analysis and intention come together. It is visual, OMDS Board and consistently utilized to manage implementation. It uses metrics as a comparison for plan accomplishment. It is used to hold members accountable

### **Key Points**

- Planning is not optional
- Good planning involves commitment to success by both parties
- Well written goals, written for the performer, provide the best opportunity for success
- Goal accomplishment requires constant monitoring and coaching by the Superior

- A plan is a commitment. The plan includes the input into OMDS to be followed and supported

### **Why it is important (So What?)**

- To avoid the waste of action that does not improve the overall organization
- Set in place the confidence to improve and engage others in the process
- It is clear and actionable tasks to success
- It provides a way to monitor and solve problems for success

## Chapter 2 Reflections

We're going to review our responses to the reflection questions in chapter 2. We'll call on you to share your reflections. We ask that each reflection generates a discussion.



## Chapter 2 Homework



- Review the competencies related to 'P' below and be prepared to discuss them during the next class session (ref: [AF Competencies for CI](#))
  - Competency - Ability to carry out tasks and achieve targets; Behavior - Appropriate judgement
  - Competency - Ability to carry out tasks and achieve targets; Behavior - Decision making
  - Competency - Ability to manage an organization; Behavior - Prioritization and allocation of resources
  - Competency - Ability to manage an organization; Behavior - Establishing framework and systems for management
  - Competency - Technical knowledge and capabilities; Behavior - Technical proficiency

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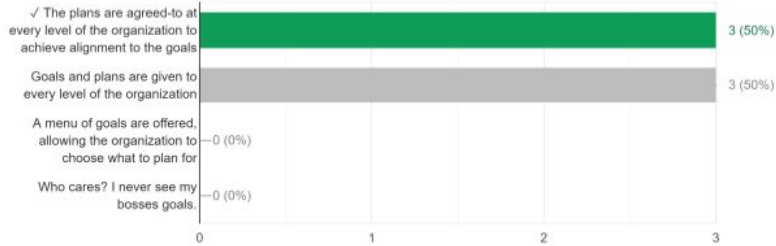
Notes:



# 'P' Quiz Review



Goal deployment (or strategy deployment) means:  
3 / 6 correct responses



- The difference between these two answers is that plans are not **given** to every level of the organization (goals are)
- Plans are required of every level of the organization, except the value adder level, to gain alignment and commitment


## Notes:

<https://forms.gle/Taqny3PzDnFszzxWA>

## Start / Recap

As you'll recall from the previous chapter, we have created a plan to be implemented. You have completed the fun part, now it is test time to see that the plan is executed. To do this properly you must have thorough analysis and discussed the plan thoroughly, committed to it, and supported it with the appropriate resources. The commitment gained in the Plan phase will be given its sternest test.

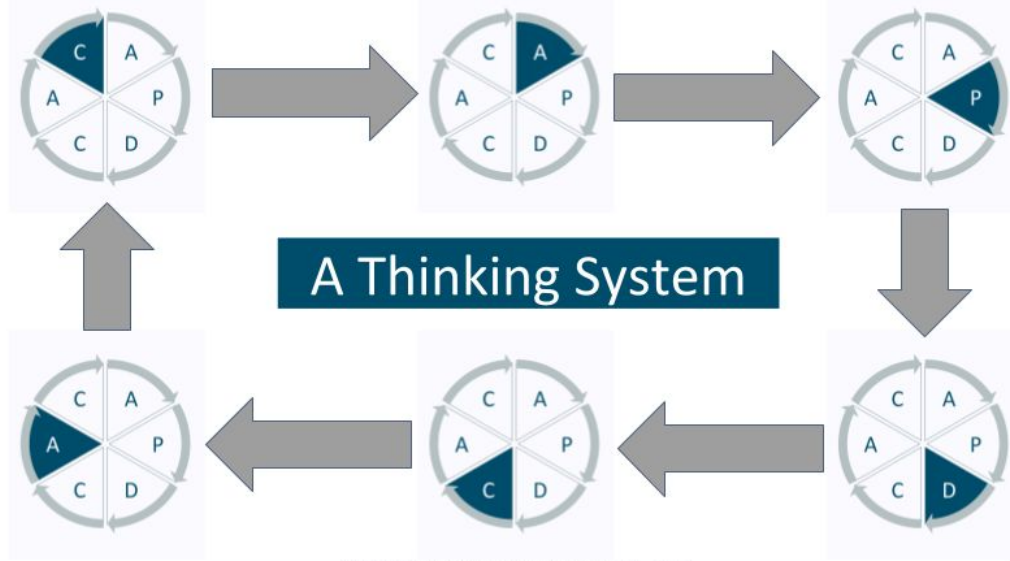
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# Instruction



## CAPDCA: The role of the Manager

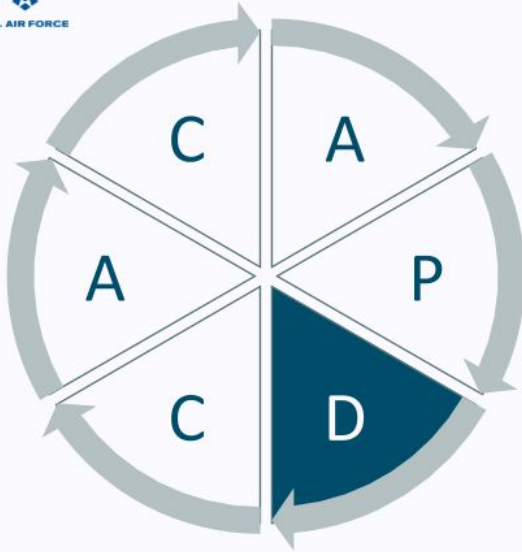


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Notes:





## Do

**Definition:**

Those delegated to do their activities

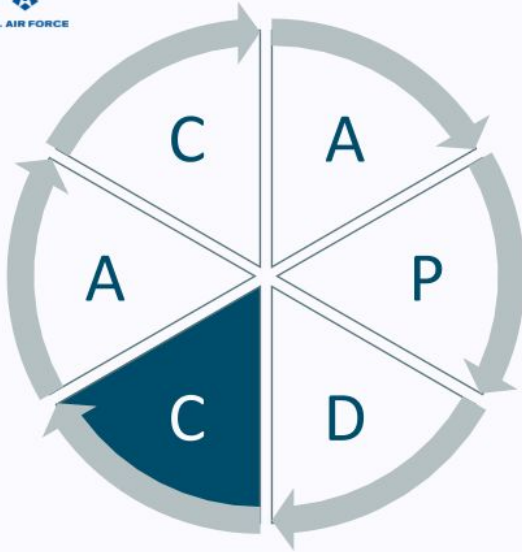
**Mindset:**

- Follow the plan explicitly
- Discipline
- Any deviation is renegotiated

**Step 1:** Implement the plan

**Step 2:** Document status daily

Notes:



## Check

**Definition:**

Observe if the plan is being followed and milestones are being achieved

**Mindset:**

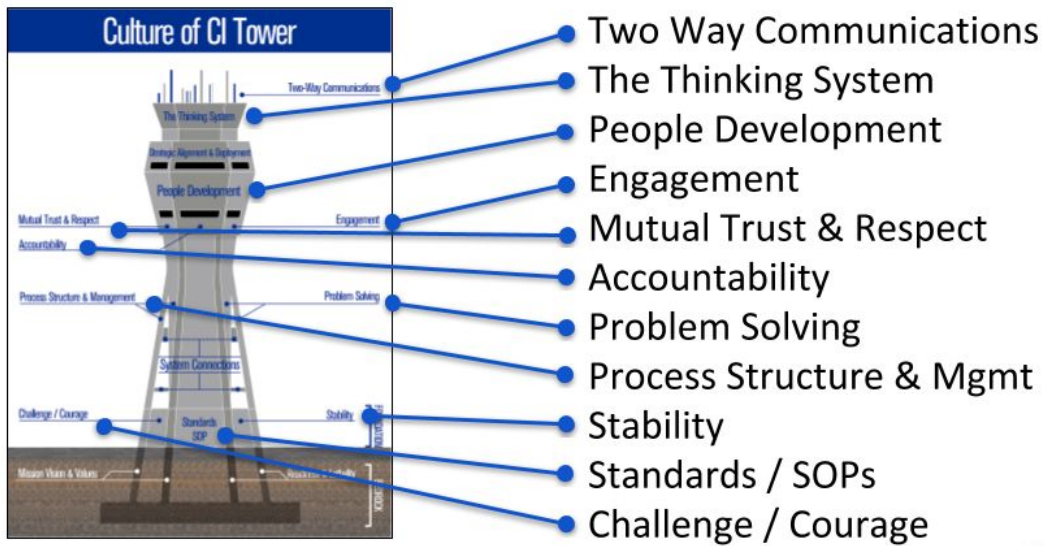
- Must implement the plan
- Informal and formal reviews
- Consistent pattern of monitoring

- Step 1:** Review the plan daily  
**Step 2:** Determine what is a priority  
**Step 3:** Go and see  
**Step 4:** Teach & coach as you observe  
**Step 5:** Set accountability  
**Step 6:** Follow-up

Notes:



# 'DC' Connections to CI Control Tower



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Notes:



# CAPDCA -- Do / Check



- The plan is a commitment
- Maintains alignment with organizational goals
- Implementation (Do) is where planned and actual performance is measured (Check)
- Presents opportunities for people development



Notes:



# Do / Check



- Observation allows the manager and the subordinates to see deviations and engage in problem solving
- Keeping metrics is an everyday discipline
- Metrics provide a basis of comparison against the plan
- If you measure too many things, you are not really measuring anything

Notes:



## Do / Check



- Check is the most important aspect of the role of a leader
- Requires close adherence to the plan
- Requires good problem solving when the plan is disrupted
- When the plan is not on track it causes a focus on the skill or the motivation of the individual to get it back on track

Notes:



# Micro Activity



## Discussion

- What are the key questions for Do/Check?

Notes:



# What, Why & How of Do/Check

- What - the implementation of the plan
- Why - to maintain alignment and eliminate the waste of random implementation
- How
  - By making continuous improvement mandatory / part of everyone's job
  - By maintaining control over the standard work as a basis of comparison
- How (cont.)
  - By stopping and fixing deviations from the standard
  - By holding everyone accountable for their roles and responsibilities
  - By utilizing observation time effectively
  - By not allowing workarounds
  - By having a practice of auditing key aspects of the system
    - Quality first
    - The equipment
    - The culture
    - The morale
    - The process

Notes:





# 7 Behaviors of Good Execution



- Know the people and the mission
- Insist on realism and honesty
- Set clear goals and priorities
- Follow through
- Build success
- Expand the development of each individual
- Know yourself



Notes:



# Job Instruction Training



- Job Instruction Training is a **standardized & formal** system to ensure consistent training methods across an organization  
SAFETY + QUALITY + TECHNIQUE = PRODUCTIVITY

- Prerequisites

- Standard Work Instructions (What)
- Job Instruction Sheets (Why & How)
  - Job Breakdown Sheets
  - Element Instruction Sheets
- Certified Trainers
- Formal Evaluation System



\*Job Instruction Training is also known as Training Within Industry (TWI)  
[Job Instruction Training](#) - video from LEI

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Notes:



# Job Instruction Training



- Step 1 – Preparation (of the learner)
  - Put the learner at ease. Find out what they already know about the job. Get them interested in learning the job.
- Step 2 – Presentation
  - Tell them, show them, have them tell you while you do it, then have them show you & then have them show & tell you. Instruct slowly, clearly, completely and patiently, one point at a time. Do not let them perform a step until they have explained it to you (major step and key points). Check, question and repeat. Make sure they really learn.
- Step 3 – Performance Try-Out
  - Test the learner by having them perform the job. Ask questions beginning with why, how, who, when or where. Observe performance, correct errors and repeat instructions if necessary. Continue until you know they know.
- Step 4 – Follow-Up
  - Put them on their own. Check frequently to be sure they follow instructions. Taper off extra supervision into normal supervision once they are qualified to do the work.

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Notes:



# Micro Activity



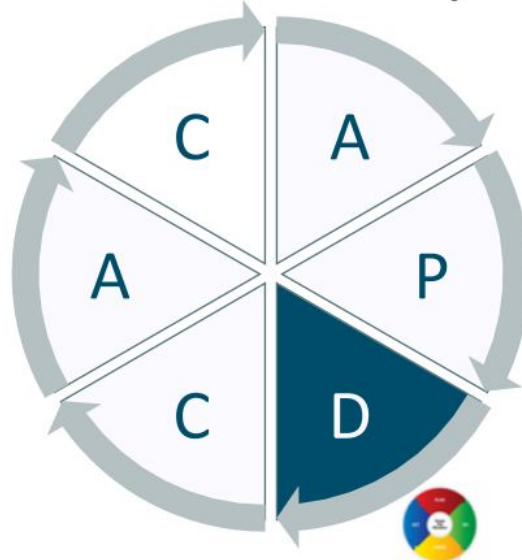
## Discussion

- How are standards maintained?

Notes:



# Mini PDCA Within Do / Check



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Notes:



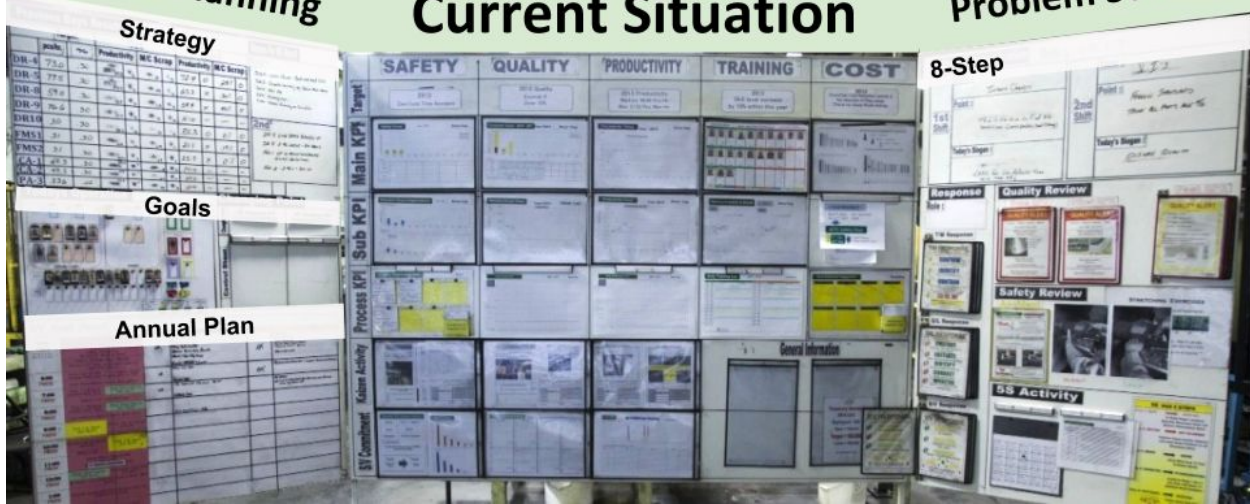
# OMDS Board



Goals & Planning

Current Situation

Problem Solving



Notes:



## Key Points for Do & Using OMDS

- Produce hourly, daily, weekly, monthly Update charts
- Manage for Daily Improvement (MDI)
- Coach your team
- Develop the team by having them learn from the daily report
- A great communication method - with immediate with feedback

Notes:



## Key Points for Check & Using OMDS

- During the Check phase, the data, information and results gathered from Do and displayed in OMDS are monitored and evaluated
- Compared to the expected outcomes to see if they have been completed as planned
- The outcomes from the plan are evaluated to see if the action items are followed up

Notes:





# Do / Check Using OMDS



1. Confirm that you have all the resources you need in place
  - a. Assemble resources
  - b. Assign and clarify roles
  - c. Confirm competence with roles/functions
2. Begin according to the plan
  - a. Review project statement and objectives with those who will work on the project
  - b. Establish ground rules and roles for team members
  - c. Review the project plan to clarify task assignments, performance expectations and completion date

Notes:



# Do / Check Using OMDS



3. Monitor Project
  - a. Measure progress toward objectives
  - b. Assess/analyze the situation
  - c. Determine appropriate action
4. Complete activities according to plan
  - a. Follow the steps as planned
5. Maintain ongoing thorough communication (nemawashi in Japanese)
  - a. The ideal situation requires an embedded Communication Plan in the overall project plan. However, in reality, communication is often left out in the plan.

[Gemba at the OMDS Board](#) (Tracy Ross)

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Notes:



## What is Happening During Check

- Visually confirm plan is followed and targets are being met
- Structured quality checks - visual schedule tracking and audit process - team leader or supervisor
- Set a routine of going to the worksite in Leader Standard Work
- Deviations resolved through the 8-Step or informal problem solving
- Follow up to ensure compliance with the coaching

[Gemba Walk](#) (Gemba Academy)

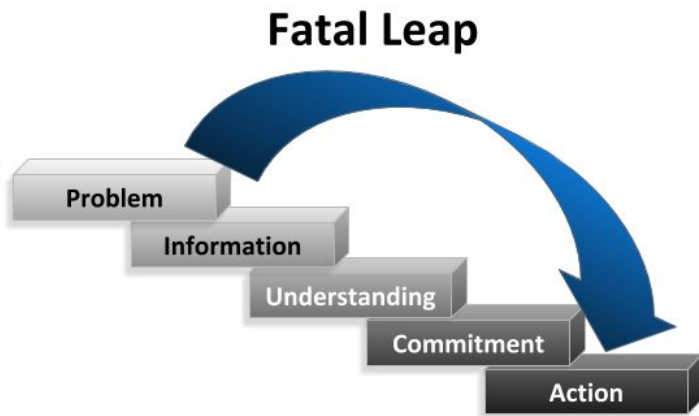
Notes:



# Do / Check Challenges



- Workarounds
- Fatal Leaps
- Work from opinions
- Ignoring problems
- Having others solve their problems



Notes:



# Micro Activity



## Discussion

- What do you need to pay attention to during Do and Check?

Notes:

## Case Study



# Case Study - WBY Current Situation



- It is now mid-year 2021 and execution is underway
- The Coating Department implemented FMDS 3 months ago
- Progress has been slow; some of the KPI / KBI designed to check the impact of their countermeasures are below the standard set
- The Department Manager is at the department FMDS board with her Group Leaders. She has just concluded her weekly Gemba walk focused on the MDI process. She has noted that the training of potential Group and Team Leaders is behind schedule. (This is a major issue for a smooth process for CPI<sup>2</sup>).
- Furthermore, she sees that the department Group Leaders have relied on CPI<sup>2</sup> practitioner green belts to solve some problems for them.

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Notes:



# Case Study - Assignment



- You are the HR Manager
- At the beginning of the year, the Training and Development department was tasked with integrating CPI<sup>2</sup> thinking, concepts, methods and tools into all the onboarding, upgrade, promotion and refresher training for every role in the organization.
- The implementation tasks are being executed on time, however the KPI & KBI are showing an impact that is less than goal.
- The department has an almost overwhelming number of problems to solve, but have resisted, stating they do not have enough time to address them.
- Review the Miro Board and determine as a group how you would bring the situation back to standard.

Notes:

## Dialogue

How do you know you are ready for full implementation?

- Discuss the OMDS boards in general
- Discuss Job Instruction Training
- Discuss standards development and maintenance
- Discuss the preparation of the people

What are the key communications that should flow to the Team Members?

What should the leaders pay close attention to?

You are planning to go see how implementation is going. What would you plan to see as you go to the plant floor?

The metrics and standards are not being met. How do you get everything back under control? What systems are you going to put in place to prevent this from recurrence.

Notes:



## **Application - WBY**

Review the miro board for more information regarding the situation in the Training and Development Department

Determine what actions are needed to restore control to the CPI<sup>2</sup> integration implementation.

## **Discussion - WBY**

Notes:



## Application - AF

How do you integrate the auditing of the AFIs and checking to ensure implementation of deployed goals?

## Discussion - AF

Notes:

# Group Discussion

Notes:

## Challenge (Takeaways)

Through Doing, the work of implementing the plan to reach the goals of the organization is performed for both the normal operational mission and for continuous improvement. Through Checking, leaders at every level of the organization observe the results of the implementation and compare those results to the standards (metrics and plan milestones) set in Plan. This is where the discipline of executing a plan over a long period of time becomes critical. While Do and Check are ongoing, you need a means to perform formal reviews for recognizing status to the plan and to decide on potential adjustments to the plan in Act (Adjust).

**The following page shows competencies and behaviors that are necessary to Check / Act (Adjust).** The complete table of

competencies and behaviors for CI can be found here

<https://leanmpi.com/af-cpi2/cpi2-class-20-06/#reference-material>

(scroll down to “AF Competencies & Behaviors for Continuous Improvement”).

Reflection Homework: Write 3 reflections on the Do and Check Competencies provided to you below and the implications for AF career field education.

1.

2.

3.



# Chapter 3 Homework



- Review the competencies related to 'DC' below and be prepared to discuss them during the next class session (ref: [AF Competencies for CI](#))
  - Competency - Ability to identify issues;  
Behavior - Adherence to standards
  - Competency - Ability to carry out tasks and achieve targets;  
Behavior - Perseverance
  - Competency - Ability to manage human resources;  
Behavior - Appropriate evaluation and feedback
  - Competency - Leadership; Behavior - Integrity

Notes:

## Confirm Objectives & Quiz

Quiz: <https://forms.gle/AVXDPSiu2Gi5vsN16>

Objective	Met?
Understand the connection of Do with Plan	
Understand how to make a plan an efficient implementation	
Understand the value of Check to assess where you are	
Understand the utilization of methods for checking goal accomplishment and development of team members	
How to deal with typical issues that arise in Do and Check	