

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

CPI² Simulation

Experiencing an Environment of CPI² Support



Eagle Harbor Solutions
Total Systems Development

6th Cohort
October 2020



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Chapter Four: CAPDCA

Act (Adjust) based on formal reviews

In this Chapter

This chapter covers the Act (Adjust) phase of CAPDCA where formal reviews take place. These reviews cover the status and results of operations and Continuous Improvement activities and serve as formal decision-making bodies for re-planning, if necessary. The reviews also prepare the way for next year's strategic planning activity.

Activities

- WBY Case Study for A
- WBY Act (Adjust) exercise
- Air Force application discussion

Why is it important (So What?)

- To continue to build confidence in the process of continuous improvement
- It is a great opportunity to continue the development of individual
- Can give individuals the opportunity to learn how to present
- To continue to strengthen connection between implementing plans and continuous improvement

The Mindset for Act (Adjust)

- Use formal quarterly and mid-year review
- Consider these review as a long reflection time
- Gather the entire team together for this review
- Surface problems, re-plan and reallocate resources when necessary
- At year-end review, celebrate accomplishments and focus on the future

Keys

- Detail in the reflection focusing on the issues or problems not covering all the detail
- Those accountable do the presentation
- This is a great time to see the development level of those who present and support

Review of Chapter 3

Bottom Line

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.

Key Points

- 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

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

Chapter 3 Reflections

We're going to review our responses to the reflection questions in chapter 3. We'll call on you to share your reflections. We ask that each reflection generates a discussion.



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:



'DC' Quiz Review



Notes:

<https://forms.gle/AVXDPSiu2Gi5vsN16>

Start / Recap

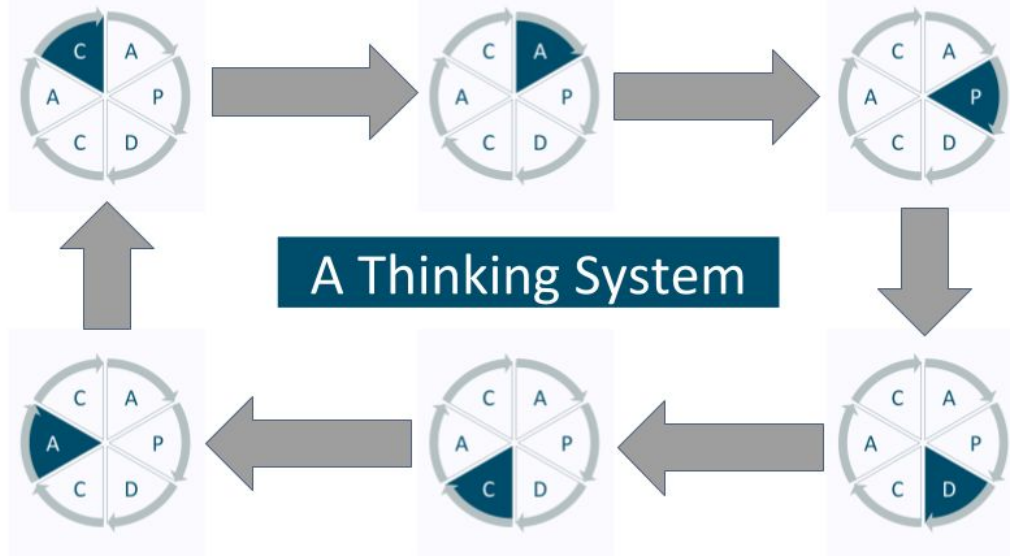
As you'll recall from the previous chapter, we have implemented the goals according to the plan and have, during regular operations, checked to see if there is compliance to the plans and standards. The Check of these results gives us a picture of the capabilities and development needs of the organization. In Act (Adjust) this information will be used to define problems that need to be solved and development that will be coached or trained. At the conclusion of the final review for Act (Adjust) the leader will set the direction for the upcoming annual plan. Basing the plan for the new year on the results of the current year allows the rationale for it to be based on facts gathered during Plan, Do, Check and Act (Adjust).

Notes:

Instruction



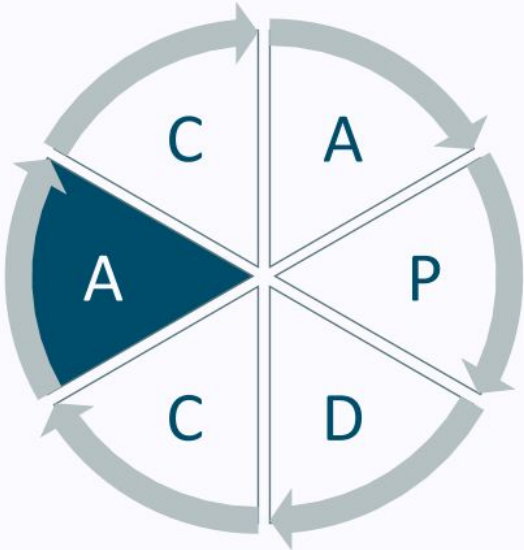
CAPDCA: The role of the Manager



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Notes:



Act (Adjust)

Definition:
Formal reviews allow the group to see the sum total of their efforts

Mindset:

- Quarterly or mid-year review
- Surface problems, re-plan and reallocate resources
- Year-end: celebrate accomplishments, focus on future

Step 1: Set the review timing

Step 2: Set the format

Step 3: Have owners present

Step 4: Find problems

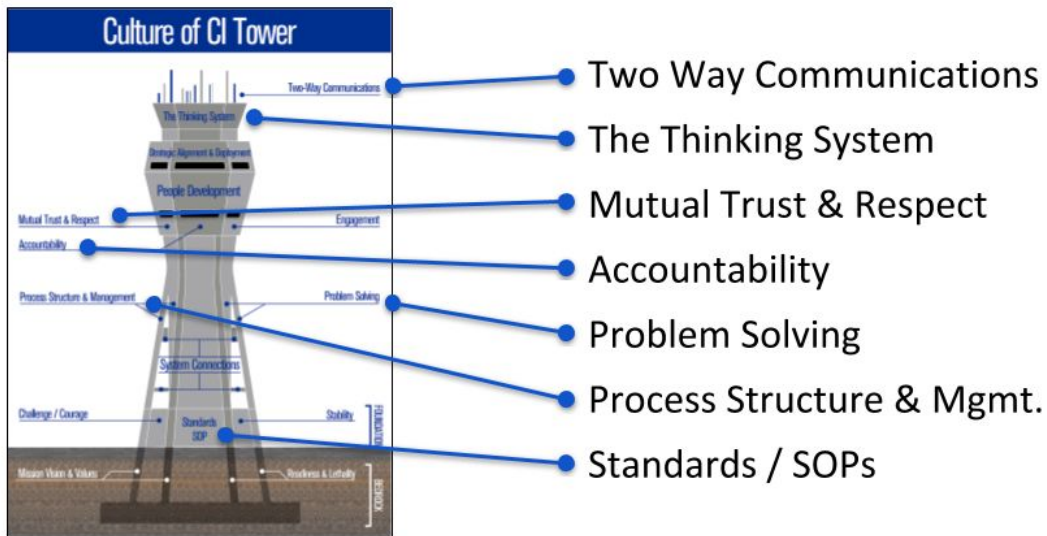
Step 5: Define support

Step 6: Follow-up for accountability

Notes:



'A' Connections to CI Control Tower



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Notes:



CAPDCA -- Act (Adjust)



- The Act phase is where a process is improved based on information gathered
- Records from the Do and Check phases help identify issues with the process
 - These issues may include problems, non-conformities, **opportunities for improvement**, lack of support, inefficiencies and other issues that result in outcomes that are evidently less-than-optimal
- Root causes of such issues are investigated, found and eliminated by modifying and documenting the process

Notes:



Act (Adjust)



- Processes are examined
- Risk of planned improvement is re-evaluated
- At the end of the Act Phase, the process has better instructions, standards and goals
- Planning for the next cycle can proceed with a better baseline
- Work in the next Do Phase should not create recurrence of the identified issues
 - If it does, then the action or adjustment was not effective

Notes:



What, Why & How of Act



- What
 - Thinking about adjustments to the current situation and gathering information for direction for the next annual plan
 - Defines if the appropriate support is being experienced
- Why
 - Must take advantage of all opportunities to develop organization
 - Belief in ability of everyone
 - Becomes a strategic capacity to make the organization both flexible and driven to be more competitive
- How
 - Standardize successful changes across the organization
 - Combination of going and seeing and analyzing the data available from the OMDS
 - For People Development
 - Involves the conscious effort to continue to define their development level
 - Providing learning opportunities during the year and defining long term plans
 - Could involve rotations, learning experiences and most importantly the opportunities that the current job provides on the job

Notes:



Methods Used in Act (Adjust)



- Establishing a routine for reviews
- Coaching techniques--problem solving & support
- Tracking progress against goals
- Daily pinpoint the problems and set expectations
- Strategies for attaining resources
- Job Instruction Training for improving standard performance
- Project management for understanding commitment
- Quarterly reviews

Notes:



Quarterly Reviews



- **Agenda**
 - Each subordinate on the team takes turn
 - Review the goals in order of the Superiors
 - If goal is on track not need to report
 - If the goal is below expectations it must be report and analyzed.
 - Use the 8 step as the review process
- **Purpose**
 - Superior is looking for problems to support
 - Superior is looking for development level
 - This is a great time to coach
 - Superior can help the subordinate prioritize
 - Problems are good
- **Outcomes**
 - Status known
 - Coaching takes place
 - Development plans are considered
 - The need for support is defined
 - Level of accomplishment is know by all subordinates and team work is emphasized
 - Use of standards are emphasized
 - Plans with detail can be created and aligned
 - Improvement targets become a part of the job

Notes:



Toyota War Story



Paint line crossover

Notes:



Micro Activity



Discussion

- Why was the adjustment necessary?

Notes:

Case Study

We will take a look at a year-end review to see how adjustments are made. This review is for the year-end after a period of working on the goals for improvement and after several quarterly reviews.

Dialogue

Why is it important to do quarterly reviews?

What type of action should be taken during this review?

- People
- Process
- CPI²

What should not be done in the quarterly review?

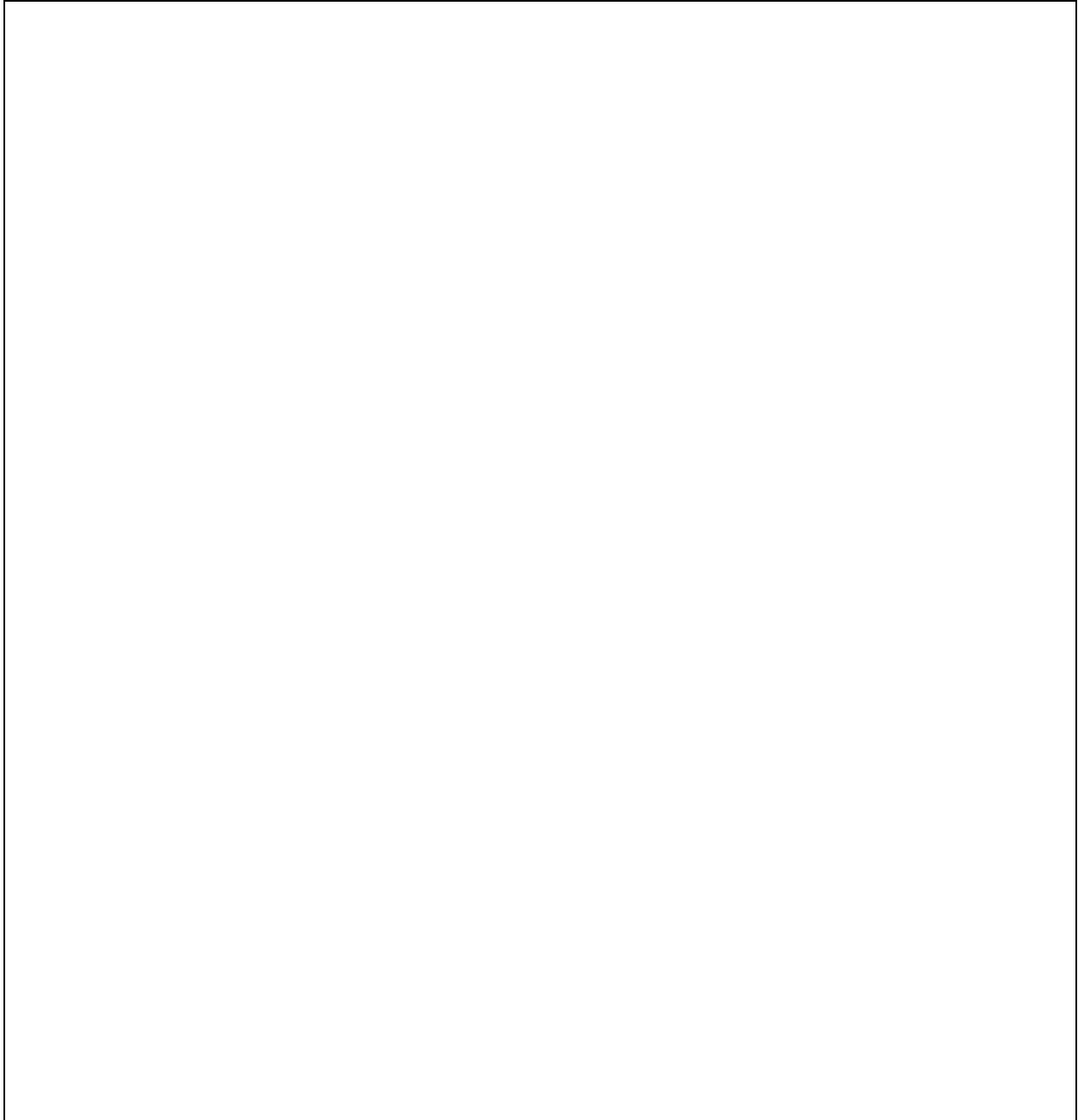
Notes:

Application - WBY

What are the issues learned through Act (Adjust) that are important to consider for the next annual plan?

Discussion - WBY

Notes:

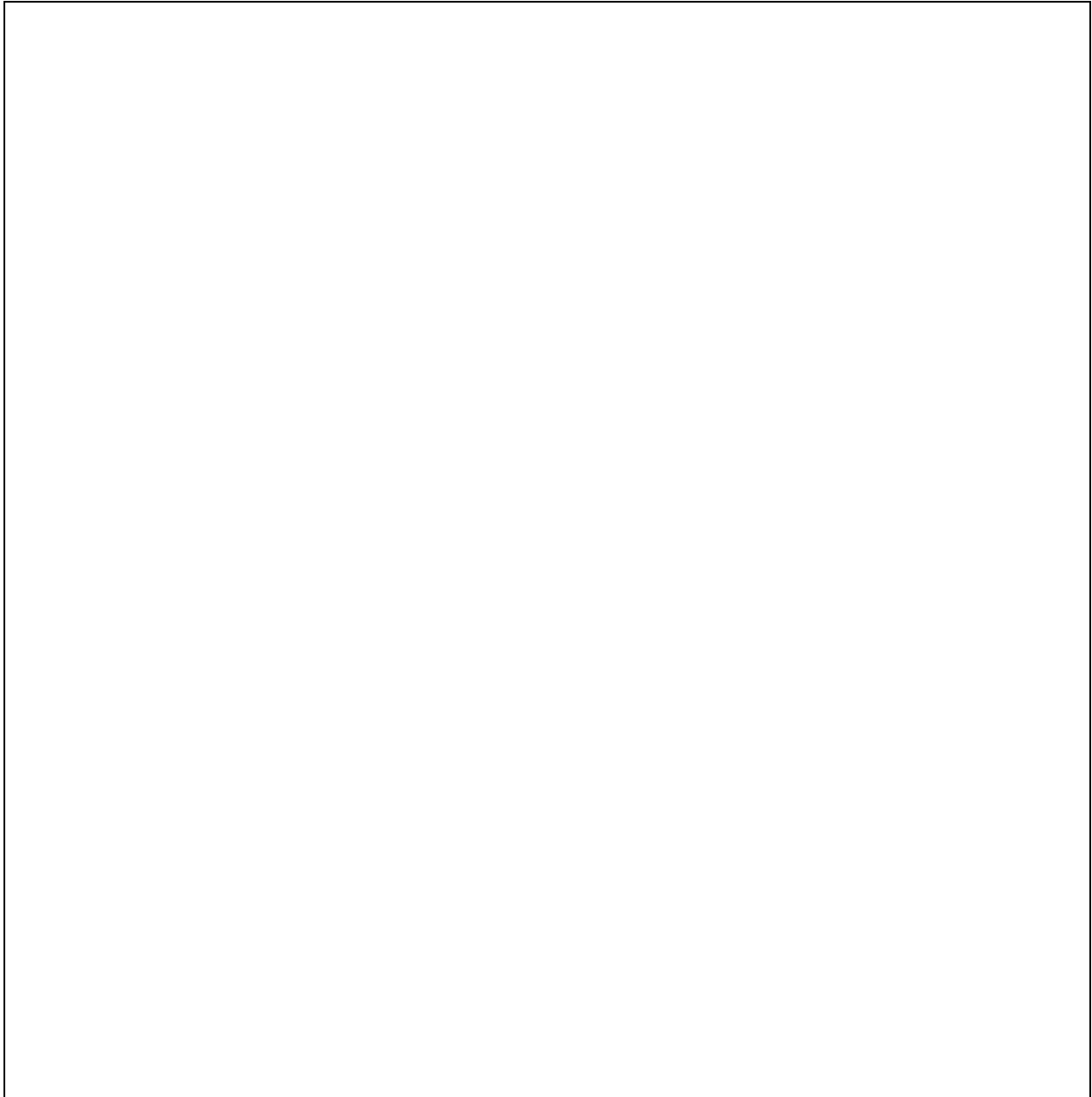


Application - AF

What would a quarterly review look like in the Air Force?
How could it be aimed at all the improvement plans and not just operations?

Discussion - AF

Notes:



Challenge (Takeaways)

None of these competencies are new compared to the other phases, they only take on a different emphasis in Act (Adjust).



Chapter 4 Homework



- Review the competencies related to 'A' 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 an organization;
Behavior - Establishing framework and systems for management
 - Competency - Ability to manage human resources;
Behavior - Appropriate evaluation and feedback


Notes:

Confirm Objectives & Quiz

Quiz: <https://forms.gle/7WA97LMy1yRqPSmo7>

Objective	Met?
The meaning of Act or Adjust is understood	
The disciplines that support Act / Adjust are understood	
The potential for development contained in the reviews	
Understand the connection between the reviews, grasping the situation and future planning	

CAPDCA Review



**WILD BLUE YONDER
CORP**

Mission
Enrich society through serving our customers in providing great, reliable, precision aircraft components for our national defense

Vision
Be the preferred aerospace parts supplier to the United States Air Force

Values

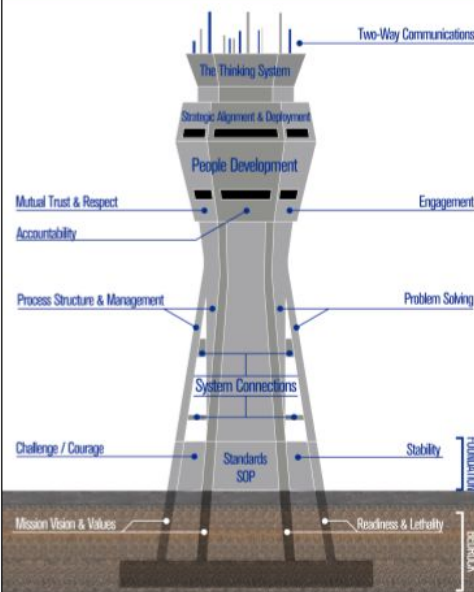
• Customer first	• Promote challenge and courage
• Competition and cooperation within the aerospace industry	• Mutual trust between employees and management
• Applied innovation	• Cost consciousness
• Respect for the value of people	

Operating Principles

• Seek the most rational way	• Strive for cost effectiveness
• See and experience what is actually occurring firsthand	• Promote teamwork for the best results
• Consider mid-term and long-term needs	• Develop subordinates for Company growth

WBY Culture

Culture of CI Tower

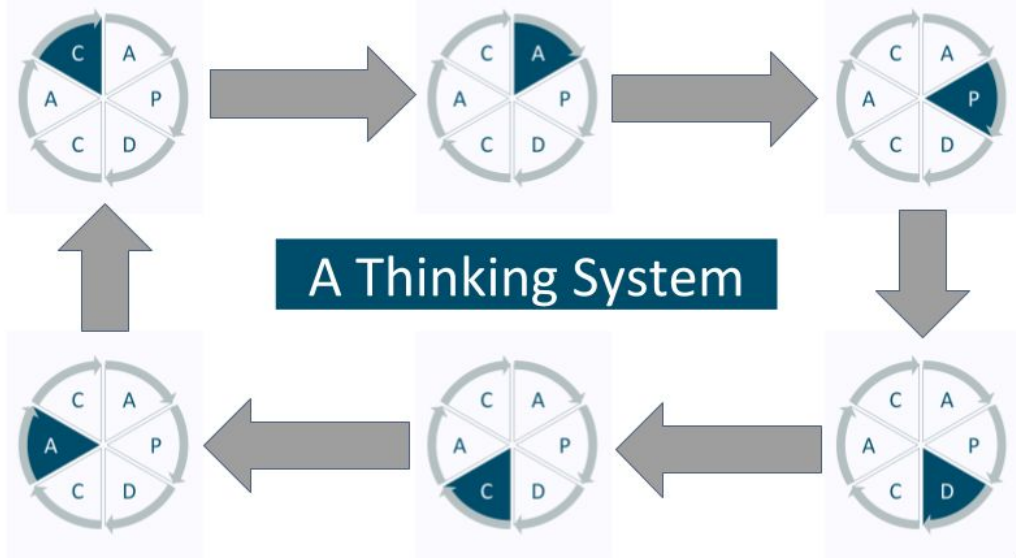


The diagram illustrates the 'Culture of CI Tower' as a multi-tiered structure. At the top is 'The Thinking System' with 'Two-Way Communications'. Below it is 'Strategic Alignment & Deployment'. The middle section is 'People Development', which includes 'Mutual Trust & Respect', 'Accountability', 'Process Structure & Management', and 'System Connections'. To the right of this section are 'Engagement' and 'Problem Solving'. Below 'System Connections' is 'Standards SOP', which includes 'Challenge / Courage' and 'Stability'. At the base is 'Mission Vision & Values' and 'Readiness & Lethality'. A vertical scale on the right side is labeled 'MULTIPLYING' and 'SCORING'.

Notes:



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Notes:



Check

Definition:

Sorting what is going on versus what should be going on

Mindset:

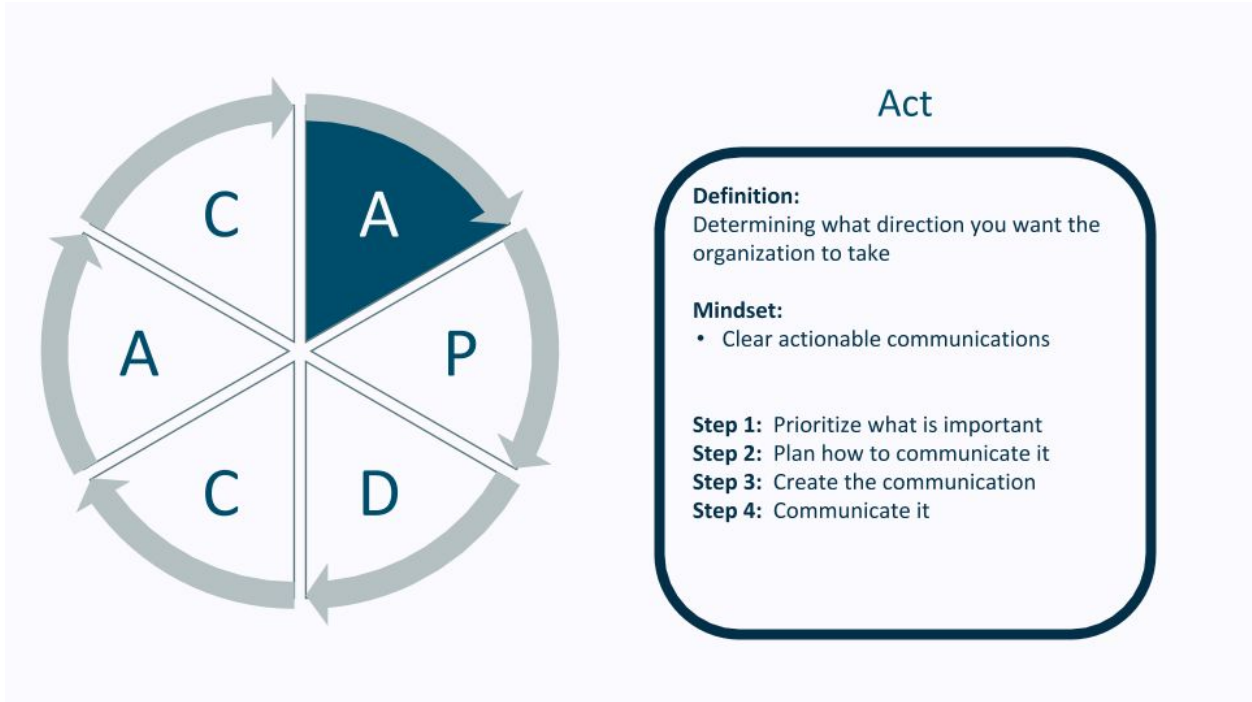
- Standard is SQDCM
- Accomplish what is agreed to in SA&D
- What is achievable now?

Step 1: Understand what is important

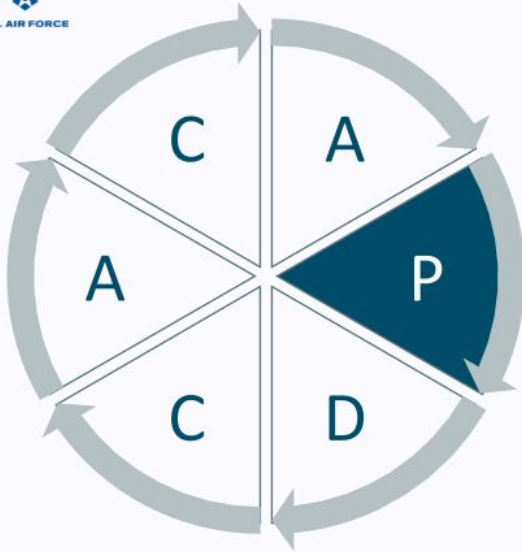
Step 2: Determine sources of information

Step 3: Define discrepancy between what is and what should be

Notes:



Notes:



Plan



Definition:

Determining who should do what, based on their skills and motivation

Mindset:

- Delegation must be appropriate and clear to everyone
- Individual development

Step 1: Determine what to delegate

Step 2: Delegate each individually

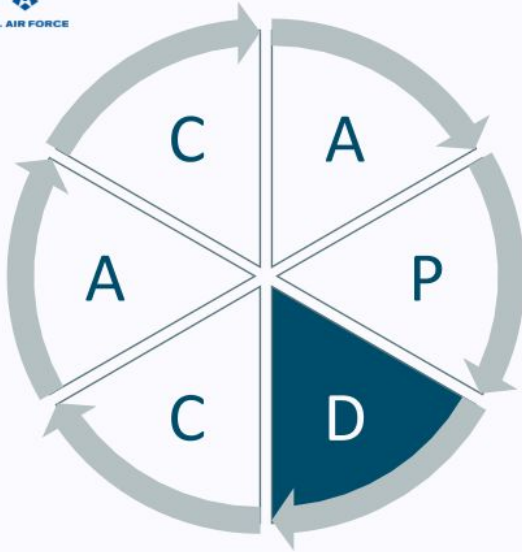
Step 3: Be sure the sum of the agreed to actions totals the goals

Step 4: Have them write plans

Step 5: Make sure the plan is consistent with delegation

Step 6: Agree on the resources necessary to accomplish the goal

Notes:



Do

Definition:

Those delegated to do their activities

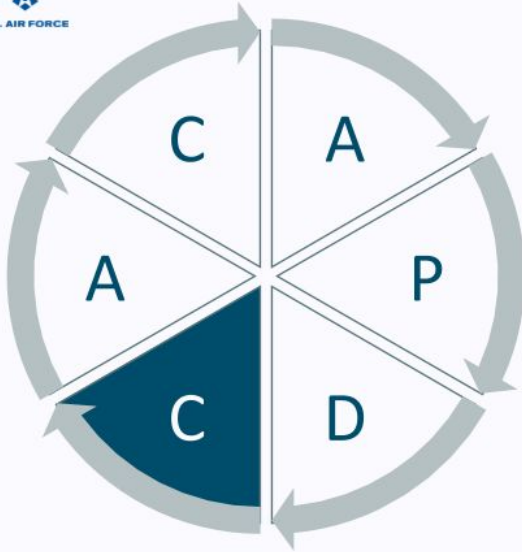
Mindset:

- 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

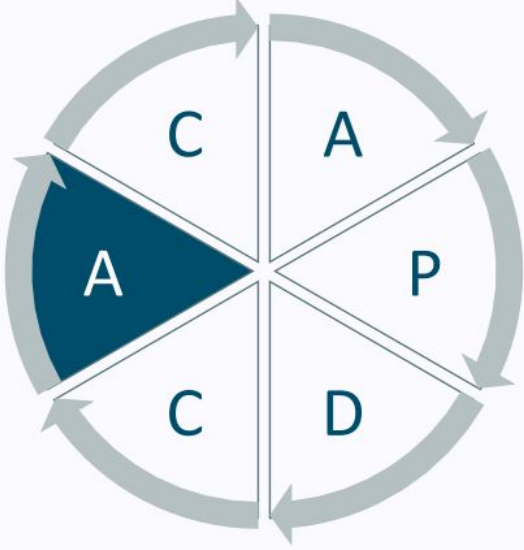
Mindset:

- 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:

Act



Definition:
Formal reviews allow the group to see the sum total of their efforts

Mindset:

- Quarterly or mid-year review
- Surface problems, re-plan and reallocate resources
- Year-end: celebrate accomplishments, focus on future

Step 1: Set the review timing
Step 2: Set the format
Step 3: Have owners present
Step 4: Find problems
Step 5: Define support
Step 6: Follow-up for accountability

Notes:

Group Discussion

- What are the weaknesses of the CAPDCA process?
- What are the key processes, issues and actions that define the success of CAPDCA?
- How should levels 3, 5, 7, and 9 be prepared for standard work in both process and in the role of the leader?
- What are the major barriers to smooth implementation in the Air Force?

Notes: