Executive Summary:
In our tenth white paper “Side (by Side) Management”\(^1\) we described a more useful view of the traditional hierarchy model by rotating the “pyramid” view counter-clockwise by 90 degrees (Figure 1). We also discussed the implications for connecting strategy deployment to daily management in order to provide value to customers, as well as facilitating knowledge creation in the organization.

This rotated view of the organization provides a useful context to better visualize the 3 primary systems that are often created in organizations that wish to create a culture of continuous improvement based on the guiding principles of enterprise excellence: 1) strategy development and deployment, 2) standard work, 3) managing for daily improvement. These are shown in Figure 2 which illustrates the percentage of time (in the ideal world) that people in the various roles (leader, manager, front-line) would be devoting to each of these 3 systems. Regarding the standard work system, the yellow area indicates leader (and manager) standard work, while the blue indicates standard work for the front-line staff.

We explored the first of these systems in our eleventh white paper “The Pracademic’s Guide to Strategy Deployment.”\(^2\) Our fifteenth white paper described the “managing for daily improvement” (MDI) system.\(^3\) This paper describes the “Leader Standard Work System (also known as the “personal management system”).”\(^4\)

This paper covers the following topics:
* some definitions for what we call “leader standard work”,
* some advice on the role of management to overcome the effects of entropy and system degradation,
* a metaphor for thinking about how the leader standard work system fits within the larger management system (the Oreo\(^\text{TM}\) cookie),
* the recommended steps for creating and maintaining a leader standard work system
* some reflections from a CEO on the evolution of their leader standard work system, and
* some general topics of advice.

We are indebted to a number of fellow “pracademics”\(^2\) who helped to share their experiences, thoughts and insights in this paper: Garrett Bean, Lorra Browne, Virginia Cosgriff, Ken Eakin, Mike Grogan, Sarah Groux, Kevin McNamara, Didier Rabino and Holly Prast.


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1. Terminology and Definitions
We begin with some operational definitions\(^5\) of the terminology that we’ll use in this paper.

**Leader** – For purposes of this paper, we’ll define a leader as someone who is in the role of “manager of people” or overseeing key systems or processes. A leader might have the role of executive, manager, or supervisor. In general, a leader is someone who is not in a front-line staff position.

**Standard Work** – The purpose of standardization is not uniformity; the purpose is to serve as a basis for improvement and for collaboration. We’ll define standard work as, “the agreement among the people who do the work about the current, best method to accomplish that work.” Standard work must not only address what people need to do and how they are to do it, but also the “why” behind the “what.” The percentage of standard work typically increases the closer that your role is in proximity to the customer. This is why the standard work area in figure 2 gradually increases from left to right. The yellow section in Figure 2 indicates that leader standard work is “personal” in nature, whereas the blue section indicates that the standard work is developed and improved by a team or group. As leaders and managers improve their standard work through application of the guiding principles of enterprise excellence (as well as through collaboration with each other) there will be less variability in the leader standard work as they link their standard work together. It is helpful to understand that standardization is not the same as “communicate.” The reader who wishes to understand the distinction can learn more about this by going to the article by John Shook found at the link in this footnote.\(^6\)

**System** – A system can be defined as a network of interdependent components that work together toward a common aim.\(^7\) A system has inputs, process(s) and outputs, which are most evident in ordered systems (versus complex and chaotic systems).\(^8\) The reader will find more information about systems in our 8th white paper, “systems by design.”\(^9\) Some people have found it helpful to substitute the word “routine” for “system.” For purposes of this paper, it may be helpful for the reader to think of a leader standard work system as the regular routine that a leader carries out in order to accomplish their most important work as it relates to connecting strategy and the MDI systems.

2. Alignment, Energy and Entropy
Figure 3 is an expanded view of Figure 2 that shows, at a high level, the various roles that people would be playing in the strategy system (top) and managing for daily improvement system (bottom). Leaders would spend the majority of their time and effort developing and deploying strategy. Managers would have their time evenly split between the strategy deployment system and the managing for daily improvement system. The front-line staff would be spending the majority of their time in the managing for daily improvement system.

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\(^5\) The concept of “operational definitions” was introduced by Walter Shewhart, and subsequently emphasized by Dr. W. Edwards Deming. An operational definition consists of a test method, a test, and a criterion by which to judge whether a piece of work may be classified as defective or acceptable. An operational definition is communicable: it is a language in which people may understand each other. W. Edwards Deming, *Out of the Crisis*, 1986, p. 262.


\(^8\) [http://Cognitive-edge.com](http://Cognitive-edge.com)


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In our experience, the current state view is markedly different from this target state. Figure 4 illustrates the common view drawn from many organizations and from a variety of industries. Admittedly, this is an exaggerated view, but the point is to illustrate how different the current and the desired states are from each other.

The following is a brief description of the current state that we have seen in many organizations. Leaders attempt to devote their time to the strategic direction and priorities for the organization, but their days are often spent in more of a reactionary, fire-fighting mode. In our experience, it is not uncommon to see leaders and managers solving problems that are more appropriately owned and solved by the front-line staff. The front-line staff focus on doing their work, but it is less common that they also see their role as “improving the work.” When problems are confronted, they are often viewed as just part of the job (waste hides itself as work). If problems are seen, they might be brought to the attention of management, but the role of the front-line staff typically stops at that point. Another way to say this is that front-line staff often see their job as problem-finders, but not as problem solvers. The reason for this may be that the front-line staff have not been adequately enabled to solve problems. What they will need is experience, knowledge of and practice with the tools and methods, as well as adequate time to practice.

The prevailing style is a difficult cycle to break for leaders, managers and frontline. Leaders can have a hard time staying out of the details of daily fire-fighting. Managers can have a hard time not playing the role of problem-solver. The front-line staff may have a hard time finding the time to make improvements or making good use of the time when it becomes available. However, we have noticed that when people are able achieve small wins by doing things in a new way, it can become contagious, then sustainable and also fun. As a result, people can take more joy in their work.

It would be improper to say that there are no systems in the current state view. Every organization has systems. These are often the informal routines and habits that have been in existence for years and years. These informal systems are the “way we do things around here”, and they serve as a sort of gravitational force that maintains the status quo. Between “designed” systems and informal systems, the informal systems tend to dominate.

In our fifteenth white paper describing the MDI system, we illustrated how the design and maintenance of the MDI system requires a shift in roles and responsibilities from management to the front-line staff. In many organizations, the burden for aligning to strategy, communication, problem-solving and standardizing the work falls squarely on the shoulders of management. Shifting the roles and responsibilities for managing for daily improvement, will make it possible for people to play the desired roles in the strategy deployment system.

The left-hand side of Figure 5 shows how the transition in roles in the MDI system occurs over time “in theory.” The right-hand side illustrates that this path is not so straight. There are many ups and downs in response to the many forces that keep us in the status quo.
Figure 6 is a close-up of the right-hand side of Figure 5. The downward arrows (dotted lines) illustrate that there is no guarantee that there will be a return to an upward path. The attraction to the status quo is strong. In our first white paper we described this as the “comfort of the comfort zone.”

Transformation to a new style of management using principles of enterprise excellence requires an on-going effort by everyone and constant infusion of energy and attention in order to overcome entropy and a return to the status quo. Where does this energy and attention come from? One answer to that question is the subject of the remainder of this paper – the Leader Standard Work (a.k.a. the Personal Management) system.

3. Think “Oreo™ cookie”
It might be helpful to think about the three primary systems illustrated in Figures 2 and 3 using the metaphor of an Oreo cookie (Figure 7). The top of the cookie represents the strategy system (described in our eleventh white paper). This system is owned by leadership and addresses questions like: 1) What business are we in? 2) What is our winning aspiration? 3) Where will we play to win? 4) How will we play to win? 5) What management systems will we need to be successful? 6) How do we deploy the key strategies across the organization? 7) How will we monitor and evaluate our progress?

The bottom of the cookie represents the daily engagement and improvement system that is occurring in every department and area in the organization. These systems are owned by the local managers and address questions like: 1) How does our work connect to the goals and strategies of the organization? 2) What are the primary work processes that we must do well in order to meet the needs of our customers (internal or external)? 3) How well are we doing on those processes? Are we winning or losing? 4) How do we keep everyone in the area apprised and up-to-date regarding our performance? 5) How are we engaging everyone in the area to identify ways to improve our performance? 6) How will we decide the current best way to do the work? How will we standardize? Although the local manager owns the MDI system, the front-line staff need to own the tools that are used in the system. The “owner” is the one who monitors, maintains and improves the system or the tools.

The middle of the cookie (the filling) represents the personal management system for leaders, managers and supervisors. This is the personal routine that each person practices and improves to connect the strategic to the daily improvement.

4 Leader Standard Work is Personal – Working ON the System
When asked about their standard work, a common response that we receive is a list of regular meetings that people participate in on a regular basis. Sometimes the list is broken down by daily, weekly, monthly and quarterly commitments. This list is merely a tool (a part of a system) and it is a helpful start, but it is not the entire system. The list tells me “what” I’m doing, but not necessarily “why” I’m doing it, nor “how” I’m trying to accomplish in those meetings.

We’ll use the framework and approach that we introduced in our 8th white paper “Systems by Design” to design and improve a leader standard work system that might work for them. This framework acts like “scaffolding” to guide the design and adjustment of the system of focus. Any leader, manager or supervisor can apply the approach. The process is broken down into two parts: 1) working ON the system, and 2) working IN the system.

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12 We discussed the idea of the IEX “System Build” framework as a type of scaffolding in this webinar: [http://bit.ly/IEXMDIPart1](http://bit.ly/IEXMDIPart1)

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Working ON the system (see Figure 8) helps to get clarity about the purpose of a person’s leader standard work system. This also requires some reflection on the most important guiding principles of enterprise excellence that the system owner wants to use to guide the design and experimentation of their system. With some clarity about purpose and principles, the system owner can define the ideal behaviors they would like to see this system drive, as well as the desired outcomes that will result because this system is in place. It will be beneficial if leaders and managers collaborate on the activities to work “ON” the system. If everyone gets a chance to participate, there will be less variation and more synergy among the team.

**Reflections from a CEO.** Kevin McNamara, CEO at TIDI Products, LLC has been practicing and adjusting his leader standard work system for several years. He provides these observations about the purpose of leader standard work, or as he refers to it “personal management system”.¹³

"My initial leader standard work consisted of an inventory of all the obligations and commitments that the CEO role is responsible for. It had no sense of priority focus and was not linked to leadership behaviors. The initial problem that I was trying to solve was stated as “the CEO has no standard work.” That initial inventory of work has been dramatically edited down as I began to think more clearly about the “purpose” of my standard work. This has created more capacity for me and has provided an ability to direct my calendar and schedule. The development of a purpose statement for my standard work that serves as a guide to how I should be investing my time has been critical. The stated "purpose" is focused in three areas:

1. "The first focus area is "transforming self” through the discipline of self-reflection and by modeling the underlying behaviors supporting the guiding principles of Constancy of Purpose and Seek Perfection. As I work on transforming self, modeling these behaviors provides me with the credibility to set this same expectation for others."

2. "The second focus area is "supporting the transformation of other leaders.” My significant responsibility is to equip the Executive Leadership Team to lead Improvement using the elements of the TIDI Management System. Our catch ball system discipline provides them individual support as they practice their model behaviors, lead strategy execution and improvement, and in turn, coach their people to do the same. Their standard work is an extension of mine. They are transforming themselves and have embraced the modeling of leadership behaviors. That expectation has also been set for their direct reports as well."

3. "The third focus area is our Executive Leadership Team System. This is the system we utilize to guide strategy development as well as monitor that we have systems in place to execute strategy and drive Improvement. This is the only Enterprise system that I am working “on” and “in.” Our focus has been challenging the purpose of how and where we invest our time. We challenged whether or not meetings or systems were still essential. If they were, we retained them, developed standard work for them, and assigned them to appropriate leaders. As we have built and launched those systems, I am no longer working “in” them and they have been eliminated from my standard. If they were no longer essential or their purpose was not clear, we abandoned them."

4. "As I invest and schedule my time, the focus is on activities that are aligned with the purpose of my standard work. The accountability and “check” on this is my calendar. This stated purpose has provided the luxury of me directing where I invest my time to provide the greatest value. This is a material shift from earlier work where I was involved in numerous and non-value-added activities, driven by calendar and meeting requests. There was no clarity of purpose."

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¹³ Kevin McNamara, personal correspondence, also refer to this webinar recording: [http://bit.ly/IEXMcNamaraLSW](http://bit.ly/IEXMcNamaraLSW)

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“We have also been very disciplined about developing standard work for the "activities" listed on our leader standard work. We have adjusted the list of "activities" and re-branded them as "purpose." This subtle change now holds us accountable to understand and continue to challenge the purpose of how we are investing our time and adjust as necessary. Questions we ask here include:
- Why am I/we spending our time on this?
- How does this link to Purpose or X-Matrix?
- Are these activities essential?
- What can we eliminate?
- Am I adding or gaining value from this?

“This questioning has resulted in ongoing "checks" of whether or not the activities are still value added. This collective discipline has really aligned all of our efforts against the essential work. Our collective leader standard work at TIDI will continue to evolve as we learn and adjust. It has been a great experiment!”

The following is an example of a person might work through the “ON the system” elements: This is merely offered as one example. The reader is encouraged to experiment with the process to make it their own.

**Purpose** – “The purpose of my leader standard work system is to help assure that I am focusing on the key activities that connect my organization’s key strategies to my primary areas of responsibility.” A leader or manager can be very busy and do a lot of tasks, but the important questions for any leader are: “Am I devoting my time in the right places? Am I doing the right things? Am I engaged in the right activities?”

**Most Important Guiding Principles** – The principles that are selected may be dependent upon the person’s role in the organization, as well as the particular aspects that each person may wish to focus on. If a team of managers are working on this together, they will benefit from sharing which principles were selected and why. It is not critical that everyone selects the same principles.

**Ideal Behaviors** – With purpose and principles in mind, each leader now turns their attention to the ideal behaviors that they would like to see this system drive or produce. In the beginning, it is most helpful to focus on the ideal behaviors that the leader will be exhibiting. As the system evolves, it will be helpful to describe the ideal behaviors that this system will drive in others (e.g. people who report to the leader, as well as the leader’s supervisor). The first draft may focus on the leader’s ideal behaviors only. Subsequent drafts of the system will likely include the behaviors that the system will drive in others. If a leader chooses to include the behaviors for others, it is important to involve those people in drafting the ideal behaviors.

One of the most important ideal behaviors that leaders and managers can exhibit is to spend time in the gemba14 to understand first-hand what is going on. If leaders and managers do not spend time seeing problems in the gemba, they will not be motivated to establish any elements of an MDI system.15 We discuss this in more detail in Sections 5 and 6.

When drafting the ideal behaviors, it is important to refer to the guiding principles that were selected. We call these ideal behaviors because these the behaviors that would be exhibited if a person understood the guiding principles. Here is an example of an ideal behavior that was drafted without referring to any guiding principles:

“Engage our frontline to share ideas.”

Now notice the difference if the leader has selected guiding principles such as “create constancy of purpose, focus on process and respect every individual” to help to focus the ideal behavior:

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14 Gemba is a Japanese word meaning “the real place.” For our purposes, we define the “gemba” as the actual place where the work is done, where value-creation occurs.
15 Personal correspondence, Ken Eakin, Export Development Canada
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“Engage our frontline to share ideas that improve processes in their area that impact the area goals and objectives.”

The specificity helps to assure that the behaviors are connected to guiding principles of enterprise excellence. Table 1 below illustrates some “do’s” and “don’ts” for describing ideal behaviors.

Table 1.

<table>
<thead>
<tr>
<th>DO</th>
<th>DON’T</th>
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<tbody>
<tr>
<td>Keep it simple, but meaningful.</td>
<td>Describe one-time behaviors – “Create agenda”.</td>
</tr>
<tr>
<td>Make it observable. Can a video camera capture it?</td>
<td>Get bogged down by wordsmithing and perfectionism.</td>
</tr>
<tr>
<td>Identify behavior you would expect to see 6-12 months from now.</td>
<td>Describe too vaguely (e.g., empower employees, generate ideas, understand the mission).</td>
</tr>
<tr>
<td>Identify the role, the action, and the “why.” For instance, “The Leader actively listens to front line staff, in order to create a safe environment to bring forth issues and problems”</td>
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</table>

Desired Outcomes – The final step of working “ON” the system forces us to think about this question, “If the system drives these ideal behaviors, what do we get?” It is helpful to think “high level” – more of this, less of that. For instance: more clarity of direction, more synergy between team members, more velocity moving strategic items forward, less wasted time in unnecessary meeting, less rework and course correction.

5 Working IN the System – Personal Experimentation

With some clarity on the purpose, principles, ideal behaviors and desired outcomes, the leader can turn their attention to the experiments that they will conduct in order to drive the ideal behaviors and get the desired outcomes. Working “ON” the system is an important step that many people skip. The tendency is to rush into the details of the process steps, without a clear understanding of what they are trying to achieve. By first focusing "ON" the system it helps as a reference to help coach each other to ideal behaviors. Also, getting results by not following ideal behaviors can often lead to unintended behaviors as well as results that aren't sustainable. This does not promote the type of culture that we want to develop and grow.

One definition of an organization’s culture is “the sum of the behaviors exhibited in an organization by which people get results.” For instance, a common approach is to give people a productivity target. There is a belief that by measuring people against that target they will hit it. But when we don’t describe the ideal behaviors by which we would like to achieve better productivity, people will try to hit the numbers by whatever means is necessary. The staff might cut corners or experience burnout just to hit the productivity numbers. This becomes your culture – workarounds, firefighting and heroic efforts.

Working IN the system (outlined in Figure 9) is all about experimentation. What process steps can be tried that might drive the ideal behaviors and the desired outcomes? What tools will be helpful? What triggers will cause the desired behaviors to show up? What type of measures can the leader track to know how their process is performing? How can the leader build a routine renewal mechanism into their calendar in order to reflect on and review the health of the leader standard work system?

Because the leader standard work system is a personal system, the process steps and related
items (such as tools and triggers) will be unique for that leader. But a leader does not work in isolation, so it is also important that the leader should share their experiment with others who also have their own leader standard work. This helps everyone to see the connections between their systems. Through collaboration with each other, the variability between individual systems will be reduced over time.

**Process Steps:**
We have found that it is helpful for a leader to start with their current weekly calendar. It seems to work best to start with current state “what do I have now?” rather than a utopian ideal state. Figure 10 illustrates what it means to think of a week’s view as a process using the PDSA cycle.

We have found it to be helpful to ask these questions:
1. How can I build time into my calendar to plan?
2. How do I devote time into my calendar for the most important things I need to do? This includes spending time to go to the gemba. (See Section 6 for more advice about this.)
3. When can I dedicate time to study and reflect upon how my week is going relative to my plan?
4. How will I adjust my process to make next week work better?

The process steps may include gathering data about, and reflecting upon, where a leader is currently spending their time. The process steps might include topics like this as part of regular conversations with those who report to you and with those whom you report to. For instance, leader standard work might include process steps for gathering data on meetings and reflecting on whether this is time well spent. Here are some examples of helpful questions to build into the process: “Is this meeting needed? Do I need to be there? How could the meetings be improved?”

**Tools:**
It is helpful to think about the tools, or tactical elements that will be used in this process. Figure 11 illustrates how to consider several factors when thinking about the tools that will be helpful. The tools are inputs to the system. The outputs were described in Section 4. There are uplink systems that need to be considered (e.g. strategy development, strategy deployment, strategy monitoring and evaluation) and downlink systems (e.g. managing for daily improvement system).

Some common tools that we have seen included in a leader standard work system include: an x-matrix (or hoshin), organizational and departmental goals, list of standard meetings, personal Kanban, accountability board, go see (gemba) data and note-gathering tool, meeting agendas, meetings, huddles, and visual problem tracking.

Figure 12 illustrates how the various tools might work together to accomplish the aim of the system.

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17 We described the x-matrix tool, sometimes referred to as a “hoshin” in our eleventh white paper: [http://bit.ly/PracGuidSD1](http://bit.ly/PracGuidSD1)
18 See Section 6 as well as footnotes 23 and 24.
may have a different intent. By itself, a tool can accomplish something, but when combined as a system, it accomplishes much more. The “litmus test” for any tool or tactical element is whether it contributes to the purpose of the system. Does it drive the ideal behaviors? Does it contribute to the desired outcomes? We tend to collect a lot of tools. It’s hard to let go of them. Many people think of a 5S system as something that helps them better organize their work space (sort, set in order, shine, standardize, sustain). One of the best applications of a 5S system is to review the tools that you are trying to use. 5S your leader standard work tools.

**Triggers:**

A trigger works like a reminder or a prompt that sets a behavior in motion. We have found that a useful way to understand the power of triggers in creating desired behaviors is through the work of B.J. Fogg, Ph.D., a professor at Stanford University. The “Fogg behavior model” (Figure 13) can be summarized in this way: Motivation + Ability + Trigger = Desired Behavior. This means that when sufficient motivation, and sufficient ability and a useful trigger come together at the same time, you will see the desired behavior. Motivation goes up and down over time. It is not realistic to change the motivation level of the individual, but it is realistic to affect ability and the trigger. Desired behaviors will occur in the green zone illustrated in Figure 13.

Figure 14 illustrates that when we are trying to practice new behaviors, it is important to practice with easier tasks (step 1) and then move gradually to more difficult tasks (step 2). Eventually it is possible to accomplish harder tasks (3). Changing a system is one way to increase the ability (making the tasks easier). When tasks are new and unfamiliar, the type of trigger might need to be more interactive – like active coaching. As tasks become more familiar and motivation increases, the trigger may change to a “spark” type trigger. This might be a reminder from a smart phone, or an agenda item that prompts the desired behavior. When habits have become more common, the trigger might become a “signal” type. An example might be a Kanban card to refill a supply, or some other type of visual signal.

In our experience, people are successful creating new behaviors by successfully accomplishing the desired behavior through 30 – 60 successful iterations at each level, before moving on to the next level.

We have also found the “MESSI” model described by Mike Grogan to be of great utility. MESSI is an acronym that stands for:

- **Meaningful** – Practicing behaviors and tasks that have meaning and purpose are more likely to “stick”.
- **Easy** – Make it easy to practice the new behavior.
- **Social** – Involve others in the new habit creation. People can help serve as triggers and reminders.
- **Set-Back Ready** – Anticipate that there will be set-backs. Have a plan for what you will do.
- **Incentive** – Giving yourself an incentive for successfully completing milestones helps to reinforce the new habit.

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19 A 5S system helps to separate normal from abnormal conditions in order to facilitate process flow so that the customer can pull for value. We described this system briefly in our fifteenth white paper “Managing for Daily Improvement”, see footnote 3. See also this short webinar recording: [http://bit.ly/5S_System](http://bit.ly/5S_System)


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Measurement
Creating and tracking a few, simple key measures that focus on leading indicators will help leaders to quickly identify if they are “on track” or “off track. Measures are connected to desired outcomes (see section 4). Here’s an example of a simple measurement system that a leader might use to track how well their process steps, tools and triggers are driving the desired behaviors and outcomes. Figure 15 illustrates how a leader might track how they are doing on 5 behaviors. This example tracking log also includes space for taking notes about what is getting in the way from doing the behaviors. The reader may benefit from viewing the recording of a webinar in this footnote provided by Lorra Browne, on leader standard work and methods to track progress.

Renewal Mechanism
A renewal mechanism is a scheduled activity where the leader takes time to study and reflect on the entire system and all of its elements to understand what is working well and should be continue, as well as what is not working well and needs to be adjusted. This includes looking at the elements in the “ON” the system section as well as the “IN” the system section. This includes bringing any data from measurements, as well as input from others, such as supervisors, peers, direct reports and customers. The cadence of this renewal mechanism may be more frequent with newer systems. As a general guide, we recommend that any system should be studied and improved at least every six months. An example of a renewal mechanism is the reminder that you get when it is time to bring your car in for maintenance. Whether it is prompted by a sticker on the dashboard or an alert from a smartphone, the car owner needs to take action to keep the car running well.

6 Other Advice
Imagine You Don’t Have an Office (or a Desk)
The craziest things make sense when you are all by yourself, especially the more time you spend in your office, desk or in conference rooms. Building time to “go to the gemba” is imperative for leaders to understand what is really going. One of the most important “do” activities that any leader can build into their standard work system is to go to the gemba. Table 2 provides some general guidance on this topic.

Table 2, Do’s and Don’ts for going to gemba.

<table>
<thead>
<tr>
<th>DO</th>
<th>DON’T</th>
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<tbody>
<tr>
<td>Start with a simple process to practice, improve this over time.</td>
<td>Show up in an area unannounced or without a specific purpose.</td>
</tr>
<tr>
<td>Include the manager of the area in the gemba walk.</td>
<td>Focus on results, performance boards, metrics, why performance is “red”.</td>
</tr>
<tr>
<td>Have a topic of focus that you want to learn about.</td>
<td>Be a tourist (gemba drive by).</td>
</tr>
<tr>
<td>Ask questions to understand the current state.</td>
<td>Make suggestions for changing, or actually change a workplace process.</td>
</tr>
<tr>
<td>Be respectful of those who are in the workplace, including saying “thank you”.</td>
<td>Rush the process.</td>
</tr>
<tr>
<td>Take some time to reflect on your observations AFTER the gemba walk.</td>
<td>Bring a large entourage on the walk.</td>
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<td>Practice humility.</td>
<td>Exhibit arrogance.</td>
</tr>
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Leader Standard Work Tools are “Working” Documents

Leaders may develop tools to help them plan and then execute their work throughout their day or week. They can also use these same tools for data gathering and note taking along the way. This makes studying and adjusting much easier so as to continuously improve their standard work system. Figure 16 illustrates how one document (a tool) might be used by a leader throughout the day or week to guide their work, trigger the desired actions, and allow for data-gathering and note-taking. At the end of the day and the week, a leader can devote time to reflection upon these documents to help improve the work for tomorrow, and for next week.

Leader Standard Work is Connected to Other Leader Standard Work

While the creation and improvement of leader standard work needs to be a personal endeavor, each of these experiments connects with each other to form a larger whole. No person accomplishes the goals of the organization by themselves. When leader standard work is connected to and informed by the experiments of others, the work becomes more synchronized and coordinated. People share their experiments with each other and the variation between the tools and methods disappears over time. People see how their individual work contributes to the larger effort. This linkage is illustrated in Figure 17.

Factory of One

A very useful resource to help guide the efforts of any leader or manager who wants to improve their own personal performance (and thereby creating and improving their own standard work) is the book, *A Factory of One*, by Daniel Markovitz.23 Here are just some of the important concepts that the reader can learn about and use for their personal experiments:

* Understanding personal 5S,
* Managing your desktop,
* Managing your e-mail system,
* The fallacy of multi-tasking,
* Visual management.

Personal Kanban

Another helpful method that is addressed by Dan in his *Factory of One* book is also the topic of a book by Jim Benson and Tonianne DeMaria Barry titled *Personal Kanban: Mapping Work, Navigating Life*.24 In this book the authors describe the two principles behind a personal Kanban system:

1) Make all of your work visible,
2) Limit your work in process (WIP)

Figure 18 illustrates what a personal Kanban tool might look like. This is also a tool that can be used a team level.

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24 [http://personalkanban.com](http://personalkanban.com)

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Summary

Our last three papers focus on the three primary systems of any complete management system:

1) The Pracademic’s Guide to Strategy Deployment – The “strategy” system that helps focus the organization on the strategies needed to prepare the organization for the future.

2) The “Managing for Daily Improvement” system – The daily engagement system that helps every department or team within an organization focus their efforts on the daily improvement of work systems that provide value to a customer (either internal or external).

3) The “Leader Standard Work System” – The system that connects the strategy system to the daily improvement and engagement system. This is the focus of this, our sixteenth white paper. The paper is intended to encourage any leader, manager or supervisor to experiment with a personal management system that helps them to bridge the connection between the strategically important while daily developing themselves and others in order to provide value to their customers.

Our White Paper Series:

Our first White Paper “Foundations for Transformation: Linking Purpose, People and Process” describes the common patterns that we have observed as executives and managers have attempted to create a culture of continuous improvement in their organization. Many find themselves trapped in a cycle of “program of the month” approaches that never seem to produce the sustainable transformation of management that is necessary. However, there are some who desire to break away from this pattern and wish to switch the direction of their efforts by understanding the power of purpose, as well as learning and practicing new principles of management. We also wrote a version of this paper with language that relates to application of the principles to education.
Our sixth paper “Principles for Personal and Organizational Transformation – Enable”30 describes the principles behind the IEX model, specifically those principles primarily focused on enabling people to be engaged in and improve their work systems.

Our seventh paper “Principles for Personal and Organizational Transformation – Improve”31 describes the principles behind the IEX model, specifically those principles primarily focused on improving the work.

Our eighth paper “Systems By Design”3 describes the importance of design and redesign of key systems, in particular supporting systems of alignment, enabling and improvement. We describe a method, including a “system standard” that can help any executive and manager design and redesign key systems that will help them contribute to their organization’s purpose.

Our ninth paper “True, True North”32 describes the benefits of more fully understanding True, True North and how this can avoid the trap of the narrow definition of True North only as measures. This matters because without this understanding, the pursuit of true north can merely be “management by results” in disguise.

Our tenth paper “Side (by Side) Management”1 describes a more useful view of the traditional hierarchy model, and the implications for connecting strategy deployment to daily management in order to provide value to customers, as well as facilitating true knowledge creation in the organization.

Our eleventh paper “A Pracademic’s Guide to Strategy Deployment”2 describes some history of strategy deployment, and proposed definitions, as well as ten lessons that we have learned about the idea of strategy deployment, as well as a strategy deployment system.

Our twelfth white paper “Understanding and Application of Dr. Deming’s System of Profound Knowledge in Healthcare”33 is a reprint of a presentation from the 2014 Deming Research Symposium.

Our thirteenth white paper “Understanding and Misunderstanding Variation in Healthcare”34 is a reprint of a presentation from the 2015 Deming Research Symposium.

Our fourteenth white paper “Performance Evaluation – How is this still a thing?”35 is a reprint of a draft proposal for the 2016 Deming Research Symposium.

Our fifteenth white paper “Managing for Daily Improvement”3 describes one of three primary systems that organizations often create in order to build a sustainable culture of continuous improvement based on the guiding principles of enterprise excellence. We describe how any manager might experiment to create a system that helps to manage for daily improvement.

Our sixteenth white paper “Leader Standard Work – A Personal Management System”4 describes how any manager can create and improve a system that helps them to connect their daily work to the strategies of the organization and to the daily improvement system for which they may also be responsible for.


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The Institute for Enterprise Excellence
The Institute for Enterprise Excellence (IEX) was established in 2013 as a research, education and coaching institution that focuses on helping organizations build principle-based architecture to achieve world-class results.

We bring purpose to life by advancing the use of practical application of principles, systems and tools in pursuit of enterprise excellence.

What differentiates us is our Principle-based Deployment Model, the culmination of many years of application experience and continuous research in the field of behavior and performance.

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