

## Executive Roundtable Process

This engagement consists of four components: pre-work, Executive Roundtable workshop, post-work, and follow-up. This format ensures that everyone in attendance works from a similar base of knowledge to aid in understanding the challenges and opportunities, as well as specific things that each executive must do differently to participate in and lead a Lean transformation. Pre-work must be thorough and complete.

### Pre-Work

Notebook Section	Reading	Homework Assignments (to be submitted for evaluation*)	Page Length
1	"The Hidden Traps in Decision-Making," J. Hammond <i>et al.</i> , <i>Harvard Business Review</i> , 1998	Identify the common decision-making traps in your company. Give examples.	1
2	<i>Being Logical: A Guide to Good Thinking</i> , D. McInerney, 2005, pp. 91-129	Identify the common forms of illogical thinking in your company. Give examples.	1
3	-	Describe the strategic reasons for wanting to adopt Lean management.	1
4	-	Describe the executive team's anticipated roles and responsibilities in the Lean transformation.	1
5	-	Describe your desired outcomes from the Executive Roundtable.	1
6	<i>REAL LEAN: Unsolved Problems in Lean Management</i> , Volume Six, 2011, pp. vi-51	Identify the Lean strategy insights from Art Byrne.	1
7	<i>Better Thinking, Better Results: Case Study and Analysis of an Enterprise-Wide Lean Transformation</i> , 2 <sup>nd</sup> Ed., 2007	a) Management team identifies 3-4 challenges each for chapters 1-9. b) Provide description of success factors for your business. c) Provide summary of commitments / action items for each executive by name.	4 1 10
8	-	CEO/President: Complete a "10 Why's" analysis of "Why do most companies fail in their Lean efforts?"	2
9	-	L1 executives (individually): Complete a "10 Why's" analysis of "Why do most executives fail in their Lean efforts?"	2
10	-	Describe what makes you think you can be successful where so many others have failed.	1

\* All reading and homework assignments to be completed by each executive. No delegation or outsourcing of work is permitted.

Completed assignments should be neatly presented and organized in a single editable .pdf file (the "notebook") with pages clearly delineating each section of the notebook. E-mail the file to bob@bobemiliani.com no less than 14 days prior to the Executive Roundtable workshop.

## Executive Roundtable Process

This workshop is a no-nonsense dive into key aspects of Lean leadership that make or break Lean transformations. Our time together is limited and precludes covering ground that should have been covered by doing the pre-work. All pre-work must be thorough and complete.

### Executive Roundtable Workshop

Workshop Rules	Agenda	Time
<ul style="list-style-type: none"> <li>• We're here to learn and improve.</li> <li>• Confidentiality.</li> <li>• No laptops.</li> <li>• No cell / smart phones.</li> <li>• 100% attendance, 100% of the time (includes CEO/president).</li> <li>• No side conversations.</li> <li>• No politics.</li> <li>• Non-blaming, non-judgmental.</li> <li>• Start-breaks-finish <math>\pm</math> 1 minute to schedule.</li> <li>• Take notes in Lean transformation diary (supplied by Emiliani). Submit periodically for evaluation.</li> <li>• Practice CI + RP.</li> <li>• No theory.</li> </ul>	Pre-work evaluation and feedback	7
	Break	8:30
	Pre-work evaluation and feedback, continued	8:45
	Break	10:00
	Discussion of Lean Leadership	10:15
	Lunch	12
	Discussion of Continuous Improvement Principle	13
	Break	14:45
	Discussion of Respect for People Principle	15
	Break	16:45
	Develop executive action plan	17
	Dinner	18
	Discuss / improve action plan (over wine)	19
	Break	20:45
	Review upcoming post-work	21
Adjourn	21:15	

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Post-work is extremely important because it sets up the next phase: Lean with executive participation.

### Post-Work

Notebook Section	Reading	Homework Assignments (to be submitted for evaluation*)	Due Date (days after workshop)
1	"The Hidden Traps in Decision-Making," J. Hammond <i>et al.</i> , Harvard Business Review, 1998	Create draft visual control of decision-making traps and illogical thinking for executive use.	7
2	<i>Being Logical: A Guide to Good Thinking</i> , D. McInerney, 2005, pp. 91-129		
3	-	Revised description of the strategic reasons for wanting to adopt Lean management.	7
4	-	Revised description of the executive team's committed roles and responsibilities in the Lean transformation.	7
5	-	Provide feedback to Emiliani on how to improve the Executive Roundtable.	7
6	<i>REAL LEAN: Unsolved Problems in Lean Management</i> , Volume Six, 2011, pp. vi-51	Create visual control of Art Byrne's Lean strategy insights.	-
7	<i>Better Thinking, Better Results: Case Study and Analysis of an Enterprise-Wide Lean Transformation</i> , 2 <sup>nd</sup> Ed., 2007	a) Revise 3-4 challenges each for chapters 1-9.	14
		b) Revise description of success factors for your business.	14
		c) Revise commitments / action items for each executive by name.	14
8	-	CEO/President: Revise "10 Why's analysis of "Why do most companies fail in their Lean efforts?"	21
9	-	L1 executives (individually): Revise "10 Why's analysis of "Why do most executives fail in their Lean efforts?"	21
10	-	Revised description of what makes you think you can be successful where so many others have failed.	28
11	<i>Practical Lean Leadership</i>	Complete workbook and submit for evaluation.	35
12	-	Put executive standardized work into practice	35
13	Per Emiliani's instructions	TBD	Ongoing
14	-	Learn Lean to Teach Lean: Every senior executive commits to developing competency to teach one or more Lean tools / methods: A3, 10 Whys, VSMs, standardized work, etc. to employees & new hires.	42

There will be a one-day follow-up meeting with the executive team at 90 day intervals after the Roundtable for one year. In between, there is periodic coaching and support via phone, e-mail, and web teleconferencing.