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## Leading a Lean Initiative

Where do you begin in leading a lean initiative? That is a question we have frequently heard from people just assigned responsibility for implementing lean in their businesses. Sometimes, they spearheaded the initiative by sharing their knowledge of lean with leadership and generating excitement about its potential contribution to business success. Other times, leadership gave them the assignment based on their history of accomplishment in leading past change initiatives. When the assignment arrives, the first question they face is, “How do I begin?” These are our suggestions:

- Represent your understanding of a lean enterprise and the lean approach to commerce.
- Recognize that organizations are human endeavors.
- Recognize that a lean initiative is an instance of change making.
- Know that sustainment is a “before” issue, never an “after” issue.
- Master the knowledge that is critical to your success.
- Master the core competencies that create success.
- Conduct yourself as a professional throughout.

### Represent Your Understanding of a Lean Enterprise and the Lean Approach to Commerce

As you will read in the chapter *Lean Enterprise Model*, there is no single definitive definition of the lean approach to commerce. As Womack (2010b) discovered when he polled lean community members about the barriers to greater implementation of lean thinking, they identified confusion about the meaning of lean as the greatest barrier. Vitalo and Bujak (2023) have documented the various ways people understand the purpose that the application of lean thinking serves. Some of these purposes have resulted in lean implementations that other community members have rejected as not properly representing lean thinking. Mark Graban (2007), for example, has offered us his understanding of which applications of lean are genuine and which are not. He termed the latter as L.A.M.E. (“Lean as Misguidedly Executed”).

Vitalo and Bujak documented other gaps in lean thinking apart from a consistent definition of its purpose. For example, there are inconsistencies in the operational definitions of key lean terms. Value-added ratio, cycle time, and lead time, among other important metrics, have no single definition (Vitalo, 2014). There is also a need for the conditional interpretation of an improvement in the value-added ratio. It is possible to show improvement on that metric while actually violating lean principles (Bujak and Vitalo, 2019) as some lean community members understand them to be. A description of the various limitations uncovered by these authors is provided in the summary findings of their research into how to improve the lean model (Vitalo and Bujak, 2023a).

As a lean champion, you need to consider each gap these authors have uncovered and formulate how you intend to resolve it. Otherwise, you will be unprepared to address decisions that may arise in the lean initiative you lead. To assist you, we provide our understanding of the lean approach to commerce in the chapter *Lean Enterprise Model*. We include in that chapter a detailed description of the features and characteristics of a lean enterprise as we understand them and contrast those with the characteristics of a traditional enterprise. Finally, we operationally define each of the metrics we identify in this book in its *Glossary*.

### **Recognize That Organizations Are Human Endeavors**

A business is a human enterprise. What it does, when it does it, how well it does it, and whether it continues to do it all depend on the people who make up the organization. When these people are aligned, energized, and competent to act in a direction they value, things get done as required. Otherwise, they do not. The implication is clear. Your lean initiative cannot succeed unless you elicit and sustain the support and enable the contributions of everyone in the business. With a lean initiative, “everyone” means owners, employees, customers, suppliers, and every other business stakeholder.

### **Recognize That the Lean Initiative Is an Instance of Change Making**

Lean is a novel approach to creating business success. Leading a lean initiative certainly requires specialized knowledge about the lean enterprise model and the tools that implement it. But a lean initiative itself is also plain old change making. All the research that supports successful change making, especially transformational change making, applies to leading a lean initiative. Leverage that learning. It is essential to your success, and it is the “lean thing” to do!

### **Know That the Sustainment of a Change Is a “Before” Issue, Never an “After” Issue**

When the continued use of better ideas begins to flag, people begin to frantically search for the magic solution to sustainment. By then, it is too late. Sustainment only occurs when you build into your change-making efforts those features that are necessary for its occurrence. First, make sure that the change you are initiating is achievable given the conditions under which you must make it happen. *Task 1 Focus the Lean Initiative* in Section II of this book assists you with this step. Second, make certain that you have successfully engaged, involved, enabled, and supported the constructive involvement of all stakeholders throughout your lean initiative. If all stakeholders are aligned, capable, and invested in realizing the changes that are made, they will automatically act to sustain them. *Task 2 Involve Stakeholders* in Section II of this book assists you with these tasks. Third, establish a credible measurement system that reflects the ongoing status of the business’s implementation of the lean approach to commerce and its results. Ensure that your lean initiative demonstrates measurable improvement on both sets of metrics continuously. Make the information the measurement system captures visible and available to everyone. This will provide all stakeholders with the information they need to monitor whether the application of lean thinking is being sustained and detect when intervention is needed to correct drop-offs in its application. It also provides people the

opportunity to experience pride of workmanship in the success they have collectively produced. The chapters *Task 9 Measure Results* and *Task 10 Learn and Share* in Section II of this book support you in accomplishing these tasks. When you build in sustainment from the beginning, you never face it as an issue during follow-up.

### **Master the Knowledge That Is Critical to Your Success**

Prepare yourself to lead a successful lean initiative by mastering the knowledge you require to accomplish that end. Learn the basic requirements for accomplishing transformational change. Understand thoroughly the lean approach to commerce. Grasp in detail your role as a lean champion. Be able to explain how lean initiatives are structured. You require this knowledge to make sound judgments about what your initiative should pursue, how it should be organized, what the scope of your role needs to be, and what authority and resources you require to succeed.

### **Master the Core Competencies That Create Success**

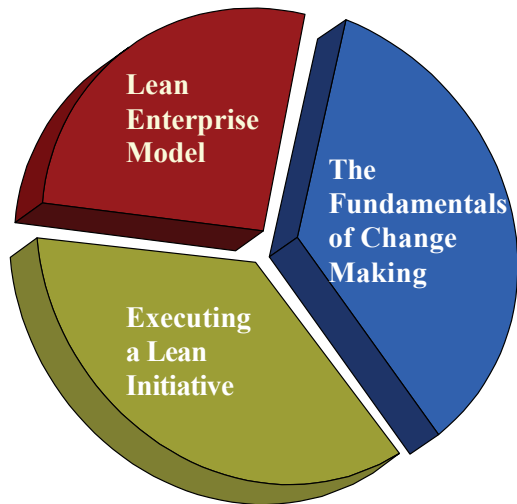
Continue your preparation by becoming proficient in implementing each of the tasks you must accomplish to successfully lead your initiative. Study carefully the 10 tasks detailed in Section II of this book. The guidance in Section II supports you in resolving the direction your initiative should pursue, developing and sustaining the people support it requires, acquiring the customer knowledge that must anchor all business decision making, measuring and managing the initiative's progress and results, and extracting and leveraging learning to accelerate the business benefits your initiative generates.

### **Conduct Yourself as a Professional Throughout**

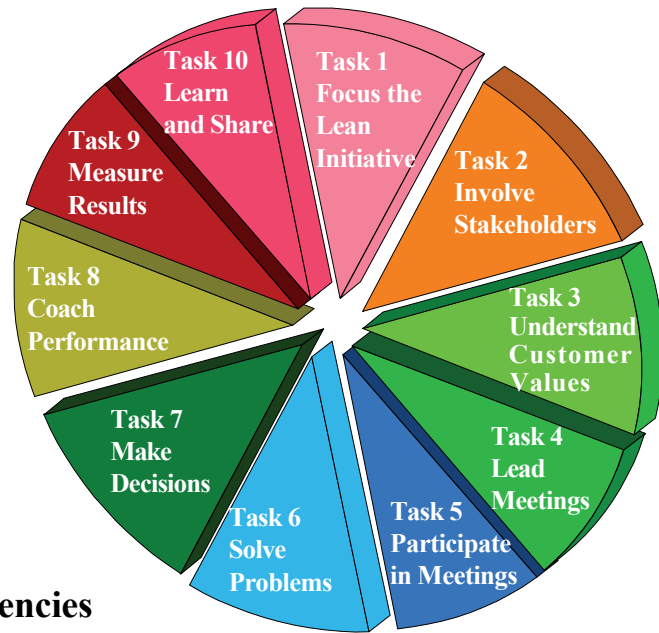
For us, a professional is someone who masters a body of knowledge and places it in the service of people. He or she is a person who is always respectful of others and never violates their trust nor betrays their best interests. A professional understands what he or she is about and can explain to others the basis for each decision and action he or she takes. A professional learns continuously and supports every other person in doing likewise. Finally, a professional *always* measures his or her impact and never assumes a result is produced without independent verification. Conduct yourself as a professional, and you will earn the respect and merit the support of others.



# Introduction



**Critical Knowledge**



**Core Competencies**

