Operational Excellence Handbook

A Must Have for Those Embarking On a Journey of Transformation and Continuous Improvement

Rod Baxter
Operational Excellence Handbook
A Must Have for Those Embarking On a Journey of Transformation and Continuous Improvement

Rod Baxter
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I would especially like to acknowledge and thank my wife Kelli, who is my thirty-three year partner in life, and in our consulting firm Value Generation Partners. It was Kelli who suggested we write a book that would provide value for business leaders and make a difference in their organizations.

Kelli has spent countless hours brainstorming with me, and reading and rereading the many drafted versions of this book. Her extensive experience in leadership consulting, continuous improvement, and project management has provided her with the necessary tools to serve as editor of this technical work. Kelli has challenged and checked facts, improved the content and flow, corrected grammar, and added significantly to the subject matter. Her input and support made this book a rich resource for those who choose to add it to their library.
Preface

This Operational Excellence Handbook contains 70 chapters organized in five sections describing strategy, culture, methodologies, project management, and tools that are helpful to create immediate and sustainable value for your organization.

To achieve a communications- and team-based culture of continuous improvement, this handbook is appropriate for organizations’ leaders and practitioners alike. As you travel on your value generation journey, you will wish to select the appropriate approach, methodologies, and tools – based on your organization’s current situation, future strategies and goals, resource availability and limitations, as well as urgency and schedule needs – that will provide immediate value.

This handbook is the culmination of thirty-five years of experience in the practical application of project management, quality management, continuous improvement, transformation, and operational excellence. It is intended to provide you with information to determine the appropriate approach, process, methodology, and tools that are right for you and your organization, and how to apply them based on your specific needs.

It’s important to note that not all organizations are on the same value generation journey. Likely the starting point and the destination differ by organization. One organization’s journey may be focused on full-scale transformation; another organization’s continuous improvement efforts may be specific to cost reduction and quality improvement.

Many of the tools and approaches described in this reference guide can be used as stand alone, or together as an overall approach, for your value generation journey. The speed and magnitude of results will vary based on the organization’s complexity and commitment to the application of the approaches, methodologies, and tools. Regardless of your value generation journey’s path, appropriate attention to commitment, discipline, and rigor must be given to the five key elements of the operational excellence formula.

\[
\text{Strategic Approach + Cultural Leadership + Methodology + Project Management + Tools} = \text{Operational Excellence}
\]
Introduction: Operational Excellence

While it is very important to clearly define operational excellence, it is bigger than a single definition. We must not simply define operational excellence; we must communicate, discuss, measure, live and breathe it, in order to achieve its benefits and sustain the culture.

Let us examine the term operational excellence and its components. Operational refers to the activities and functions of your business; excellence refers to brilliance and superiority. Is there brilliance in the activities and superiority in the functions of your organization? If so, how do you measure and, subsequently, achieve operational excellence? Vince Lombardi said, “Perfection is not attainable. But if we chase perfection, we can catch excellence.”

Will Durant, in The Story of Philosophy, summed up Aristotle’s writings as, “We are what we repeatedly do. Excellence, then, is not an act, but a habit.” Successfully achieving operational excellence is the culmination of bringing together the following key elements, all of which must be approached with consistent and repeated commitment, passion, rigor, and discipline.

- **Strategy** – leadership creates vision and values for the organization; these are distilled into strategic focus and direction
- **Metrics** – scorecards balanced to strategies, and cascading through entire organization
- **Culture** – all individuals understand the strategy, and are authorized for, accountable for, and owners of achieving the strategic vision through continuous improvement of processes, products, and services
- **Systems** – organization implements holistic, integrated quality
management system and processes

• **Methodology** – applying rigor and discipline of Design for Lean Six Sigma, Lean Six Sigma, A3 Thinking, or Theory of Constraints

• **Project Management** – applying rigor and discipline of Project Management Institute’s (PMI®’s) Project Management Body of Knowledge (PMBOK®)

• **Tools** – solution delivery (processes, products, and services), problem solving, and continuous improvement

Employing these critical elements listed above – along with a foundation of well-communicated and understood purpose, vision, mission, and set of values – creates operational excellence. Supporting operational excellence is a culture of continuous improvement that utilizes the rigor of project management. Other supportive elements of an operational excellence culture are strategy, metrics, systems, and methodologies.

Benefits of operational excellence include:

• Improved revenue and profit
• Improved customer satisfaction
• Collaborative team environment
• Improved processes, products, and services
• Improved compliance and risk prevention
• Improved organizational effectiveness
• Improved employee engagement
• Sustained, intentional organizational culture

The ensuing sections and chapters provide ingredients necessary to define, develop, and execute an operational excellence transformation. We wish your much success in your pursuit of operational excellence, thereby generating greater organizational value.
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You are holding a handbook designed for leaders and practitioners wishing to transform their organizations through strategy and culture, and through the application of operational excellence approaches, methodologies, processes, and tools.

This book will provide you with thought and guidance on:

- Strategic Approaches
- Cultural Leadership
- Practices and Methodologies
- Project Management
- Tool Selection and Use

Rod Baxter is principal and cofounder of Value Generation Partners. In his 35-year career, he has led operational excellence, transformation, and value generation journeys with several Fortune 500 global companies – representing service, health care, manufacturing, and higher education. Through these experiences, he traveled around the globe, facilitating improvement initiatives with colleagues in China, India, Japan, Korea, Mexico, United Kingdom, France, Germany, and Poland. He earned a BS from Kent State University and an MBA from the University of Akron; and he holds the following professional certifications: PMP, NPDP, BB, MBB, CMQ/OE, CQE, CQA.