



## Thank you for taking our class!

This package provides resources and reading lists, One Sheets from the class, and deeper information about Modus Cooperandi and Modus Institute. We really enjoyed meeting you all, it was good for Jim to get back “home” for a little while and spend a few days with Midwesterners. Thank you for all for two memorable classes and please let us know if we can help with anything.

## Our definition of Lean ... and what Lean is not

In a knowledge work setting, Lean is not about “doing more with less” but rather, **it’s about creating more value with less effort, and more intention**. The natural byproduct of this can be waste reduction, but is often so much more (higher job satisfaction, staff retention, and better product).

Always focus on **constancy of purpose** - *do we know what we are creating, why people want it, and what our role is in that creation?*

## Other important definitions

**Process** – Process is the social contract your teams and your organization agree upon to provide value. They define it, they engage it, they improve it. Process is intentional. If a process does not include a way to improve itself, it will not improve itself. If a process does not directly address quality, you will have shoddy product. If a process does not have a mechanism to connect with the customer, you will lose focus on customer needs.

**Change** – Change is scary for people and comes in three flavors: intentional, unintentional, and directed. **Intentional change** is generally an improvement that comes from within the organization (preferably from within the group that is changing). It is well understood both in rationale and impact, and is provided focus by people taking on the work the change requires. **Unintentional change** comes from changes in the market, staff changes, growth, customer needs, regulation, etc. This is almost always a surprise; the ability of the organization to recognize the opportunities in the change, deal with it thoughtfully, and allow it to improve the organization as quickly as possible should be a core goal of every company. **Directed change** comes from within, which can still be frightening if it is communicated poorly, comes without warning, or involves no input from the people being asked to change. Sometimes the surprise is necessary, often it’s not and ends up derailing the change itself.

**Team** – A group of people focused on the delivery of specific customer value.

**Company** – A group of teams focused on the delivery of customer value.

**Professional** – A real live human being who works in teams to provide customer value. They are the largest investment of an organization and the most under-valued.



## Books

Ackoff, Russell. The Art of Problem Solving Accompanied by Ackoff's Fables

Argyris, Chris. Teaching Smart People How to Learn and On Double Loop Learning

Benson, Jim. Why Plans Fail: Cognitive Bias, Decision Making, and Your Business

Benson, Jim. Why Limit WIP: You Are Drowning in Work

Bungay, Stephen. The Art of Action: How Leaders Close the Gaps Between Plans, Actions, and Results.(refers specifically to conversation we all had about the Intents process).

Csikszentmihalyi, Mihaly. Flow: The Psychology of Optimal Experience

Duhigg, Charles The Power of Habit

Fried, Jason and David Heinemeier Hansson. Remote: Office Not Required.

Goldratt, Eliyahu, M., Jeff Cox and David Whitford. The Goal: A Process of Ongoing Improvement.

Goleman, Daniel. Emotional Intelligence

Kahneman, Daniel. Thinking, Fast and Slow (on cognitive bias)

Maasen, Olav and Chris Matts. Commitment: A Novel About Managing Project Risk

Maurer, Robert. The Spirit of Kaizen. Creating Lasting Excellence One Small Step at a Time

Miller, Ken. Extreme Government Makeover. Increasing your Capacity to Do More Good

Newport, Cal. Deep Work

Ostrom, Elinor Governing the Commons

Rock, David. Your Brain at Work

For an alternative way of looking at Lean check out Jim's recent blogpost on Lean.org:  
Mapping a Reading List to Lean.

For more on the psychology behind why this works, check out Toni's Lean Brain series.



## Modus Resources & Discount Code

### **Modus Institute**

For all our Iowa Lean Consortium students, we are extending a 30% discount on our online classes. Use code ILC2018. (The code will be valid through September 2018).

### **Personal Kanban Website**

#### **Lean Coffee Info**

#### **Kidzban**

There are many posts discussing “Kidzban” (Personal Kanban used at home with families, with children, educators, homeschoolers, etc) on the Personal Kanban site. This one contains links to many of those, as well as videos that might serve as a good primer on using Personal Kanban with your family.

On Cynefin: See anything by its creator, Dave Snowden

On The Pomodoro Technique: See anything by its creator, Francesco Cirillo

On the thinking of Dr. W. Edwards Deming: See anything from the Deming Institute

On the System of Profound Knowledge (SoPK)

14 Points of Management (We discussed #1 in depth - “Constancy of Purpose”)

Videos --> <http://www.demingvideos.com>

### **Online Personal Kanban Tools (most are free for individual use):**

[leankit.com](http://leankit.com) | [kanbanery.com](http://kanbanery.com) | [kanbantool.com](http://kanbantool.com) | [kanbanflow.com](http://kanbanflow.com)

[kanbanize.com](http://kanbanize.com) | [asana.com](http://asana.com) | [trello.com](http://trello.com)

(For Trello: Not technically a kanban because it doesn’t have a WIP limit. For that, please download the Chrome plugin. Remember, you need that “beneficial constraint” to facilitate flow.)

Extending your GTD Practice with Personal Kanban

Online Lean Coffee Tool for Running Retrospectives:

### **Follow Us on Social Media:**

Jim @ourfounder | Tonianne @sprezzatura

Personal Kanban @personalkanban

Kidzban @kidzban

And, of course, there’s a Personal Kanban presence on Facebook



## Purpose:

Do the right work at the right time. See how your work flows. Communicate your overload to others quickly and effectively. See what's co

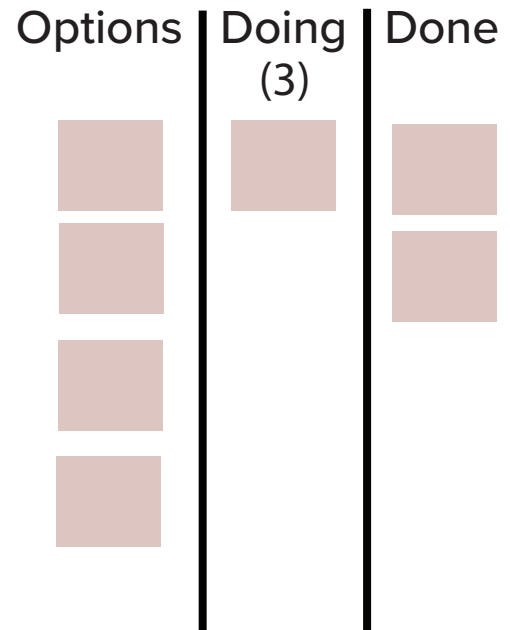
Work that is visualized can be shared easily with others, providing immediate insight into your workload.

Real-time visual information replaces lengthy status meetings, ends overload, and frees you from surprise work at the end of a deadline.

## How To Do It:

- 1 CREATE** a simple value stream of Options, Doing, and Done.
- 2 WRITE** down your current workload on individual Post-its.
- 3 PLACE** Post-its in the Options column.
- 4 LIMIT WORK-IN-PROGRESS** by writing the maximum number of tickets you can work on at a time in the Doing column. (3 is a comfortable number to begin with). This is your WIP limit.
- 5 PULL** tickets you are actively working on into Doing. Be selective! Only begin tasks that are important to you. Be sure you don't exceed your WIP limit!
- 6 PULL** tickets into Done when completed and select new Doing tasks. Notice what you've completed and consider, *was this the right thing to do?*
- 7 DISCOVER!** Which tasks make you happy? What type of work do you do better in the morning? Which tasks routinely waste your time? What other columns might your Personal Kanban need?

## The Personal Kanban





## Purpose:

Participants gather, build a meeting agenda, and begin talking.

Conversations are directed and productive because the agenda for the meeting is personally and democratically generated.

## The Lean Coffee Board



## How To Do It:

1

**CREATE** a Personal Kanban with an Options, Doing, Done, Epiphany value stream.

2

**WRITE** whatever you want to talk about on Post-its.

3

**PLACE** Post-its in the Options column.

4

**GROUP** common themes by clustering similar Post-its.

5

**VOTE** for topics you wish to discuss. Each person gets two votes.

6

**PRIORITIZE & DISCUSS** topics in order voted, pulling the topic with the most votes into Doing, and moving it into Done when finished. Repeat until Lean Coffee ends.

7

**DISCOVER!** During the discussion, capture any realizations, action items, or topics for future inquiry into Epiphany.

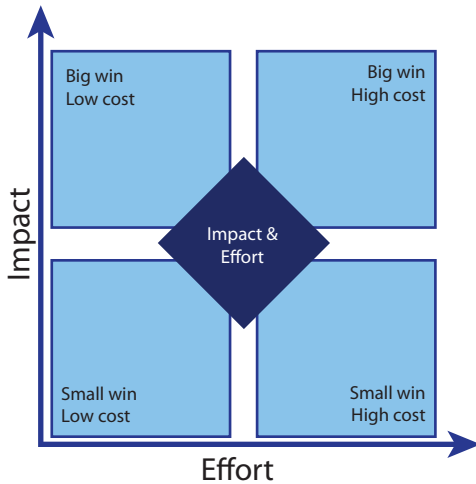




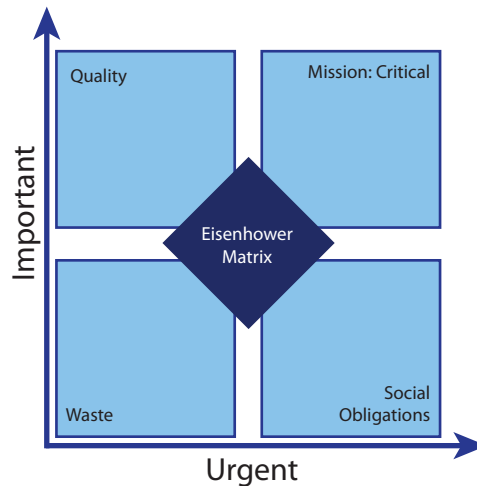
### Purpose:

Try these suggestions to make the most of your Options and Done columns.

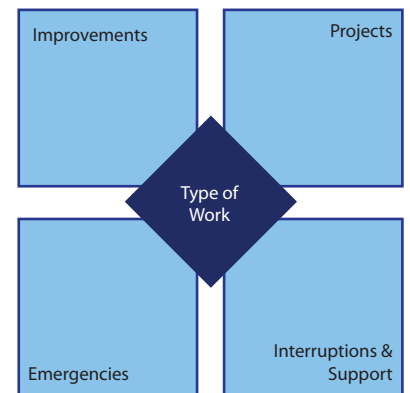
### The Options Section:



**Impact & Effort:** Sort work by Impact & Effort to surface the highest value work that is on your plate. Then pull work according to time available and return.

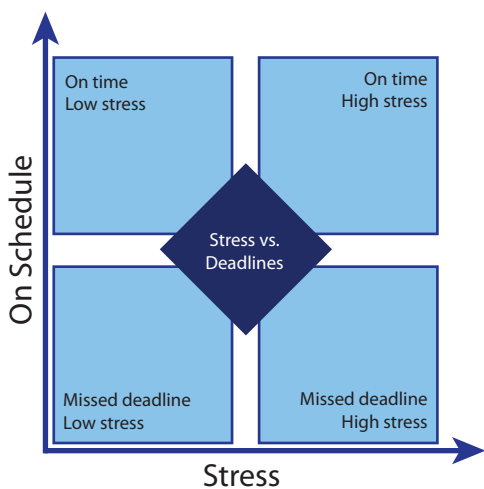


**Urgent & Important:** Sort work by its Urgency & Importance. Too many Post-its in the upper right quadrant shows a reactive and unhealthy workload.

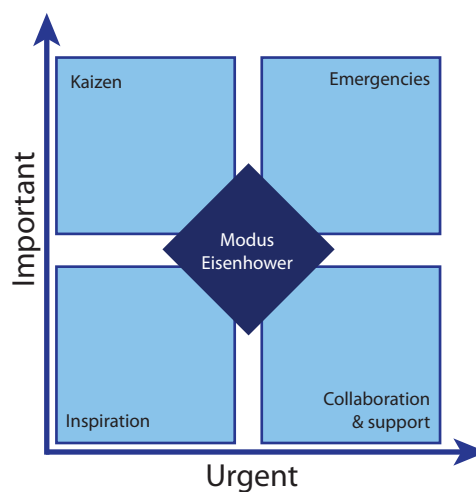


**Type of Work:** Sort work by its type. See how much of your work is planned, how much is unexpected, and how often you are able to improve.

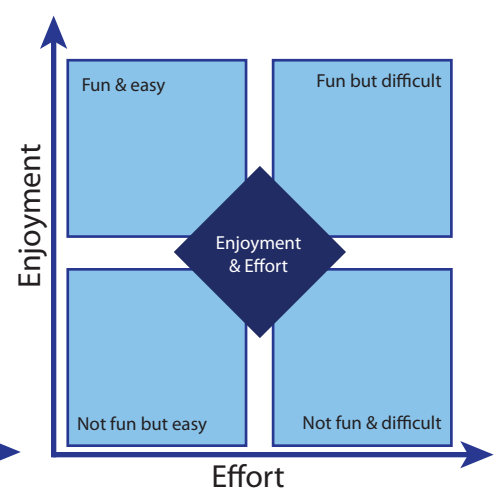
### The Done Section:



**Stress vs. Deadlines:** Sort completed work by on-time performance and anxiety. This shows how work is balanced between deadlines and other pressures.



**Urgent & Important (Modus version):** Sort completed work by its Urgency & Importance. Get a better handle on how much of your work you actually control.



**Enjoyment & Effort:** Sort completed work by your professional satisfaction. Did you enjoy it? Was it completed to your liking? Was it easy to complete?



## What's in a Tool?

There are many tools we could use when we get rolling. We can put some of them into three quick “drawers.” We won't likely use them all, and this is not an exhaustive list.

Use tools effectively. They are means to ends and not ends themselves. As always, the goal of a tool is the creation that tool engenders - we never teach a tool as a end in and of itself.

## Drawer One: Constancy of Purpose

These tools specifically speak to alignment, values, and clarity.

**Tool  
1**

### **Affinity Mapping:**

A common tool that draws on the wisdom of the gathered crowd to quickly expand / flesh out / gain alignment around an idea.

**Tool  
2**

### **Lean Coffee:**

A democratized meeting format using Personal Kanban as a base where participants generate an agenda at the start of the meeting and track the value delivered during the meeting.

**Tool  
3**

### **What is Value?**

An exercise that examines what is currently being created, who benefits, where there are gaps, what is actually needed, where innovation can occur, and where information is being squelched.

## Drawer Two: Know What You Are Doing

These tools specifically help individuals and teams discover their processes and bring them to life.

**Tool  
1**

### **Value Stream Mapping:**

Build a map of the current process (the steps the team takes to create a type of value). Examine where they are frustrated. Examine where there are breakdowns. Examine which parts bring people joy or professional satisfaction. Examine where there are training or onboarding challenges.  
*Ask ... Is this how you want to work and live?*

**Tool  
2**

### **Personal Kanban:**

Using the value stream as a base, discuss how the team takes on work, processes information, improves, and learns. Create a board that allows the team and the individuals to see work in real-time, set a realistic working capacity, and regularly discuss how they are working together.



## Drawer Two: Know What You Are Doing

**Tool  
3**

### **Talking to Each Other:**

Huddles, stand ups, and other regular meetings are key to any well functioning organization. Strategy, camaraderie, tactics, learning, and more take place in these meetings. There is a balance between situational need and awareness. Often these are ritualized, which tends to create stale structures and information. These tools would be taught in a way to create beneficial, lively, regular interactions.

**Tool  
4**

### **One on Ones:**

Weekly one-on-ones between staff members where they go to coffee and provide each other with situational awareness. These are informal coffees where each person provides an observation of working with the other person, offers some support, and asks for some support in return. Help is offered and requested, helping support a collaborative working environment. From a management perspective, this creates a hyper-informed and observant team and often can supplant annual reviews.

## Drawer Three: Plan Do Study Adjust (PDSA)

Tools designed for learning and understanding.

**Tool  
1**

### **Concepts - PDSA, System of Profound Knowledge, Cynefin:**

While most of the tools in our kit are actions, this is a package of theory. As you get rolling, people are going to start to crave the "why." Going through these three simple forms of learning, systems thinking, and complexity will be a springboard into the objects of creating a learning organization.

**Tool  
2**

### **A3:**

An A3 is an 11x17 form for defining a problem, experimenting with hypothesized solutions, recording results, and sharing learning throughout an organization. While it is easy for an organization to innovate, it's harder to record and share the discoveries. This tool is a foundational element for learning.

**Tool  
3**

### **Modus Method:**

Our internal method for collaborative solutions to complex problems. The method gathers a group of 6 to 18 people, uses their collective wisdom to generate as much understanding and options around the problem as possible, quickly analyze high-potential root causes, generate hypotheses, and run directed experiments. Great for quickly solving difficult problems that usually languish because resources are unavailable or the solution horizon looks too long or costly.

**Tool  
4**

### **X-and-Learns / Go Sees:**

If you learn something and tell no one, has organizational learning really occurred? There are many tools for lunch and learns, pizza and learns, fail and learns, go and sees, etc. The idea is to create a specific version where your people would assume that when they learned something, they could get excited about it and share it. At the same time, people would know that somewhat regularly they're going to learn something important from their peers.





## Understanding the Current State:

At Modus, we make sure that we provide just the right amount of support and training to foster success. As long as we agree there are things to do, we'll come back and help with them. When value is delivered, we will leave.

In keeping with this, we generally focus on a few cultural gauges.

## Initial Gauges of Engagement and Culture:

1

### **Definition: What problem are we trying to solve?**

We work with you to help create a culture where everyone is engaged in your mission and product and committed to the improvement thereof.

2

### **Constancy of Purpose: Do your people understand the value they create?**

We have found that quite often there are vast discrepancies in how team members describe the value they create and the methods by which they create it. When this happens, process becomes a mandate - something external to the person and their team. There is, however, a tight coupling between healthy process and ownership of value. We want to make sure everyone understands that they build and rebuild their processes (the social contract of the team) every day.

3

### **Professionalism: How does responsibility manifest itself?**

When the team is in control of their process, we will quickly see calls for "accountability" replaced with the simple act of "responsibility." We want to get a current state of how responsibility already manifests itself. *How do people pull work? How do they identify areas for improvement? How do they contact customers or markets in their time out of the office? How do they express their individual passions and what are they? How do they watch out for each other? How do they watch out for the company? Are these actions acknowledged?*

## The First Visit:

Typically, Toni and Jim come for a visit to meet the team, do a few short exercises, make sure the fit is right, and come up with a more nuanced plan. The exercises can take the form of training, a focused problem solving exercise, or even just a few days of heads-down planning.



## Start With Why:

**Conways Law:** *A product is the expression of the culture that creates it.*

Years ago, Tonianne and I sat down at a posh restaurant in Philadelphia after a day at a nameless marquee client. We were excited to be a small, two-person firm working with one of the largest companies on earth. However, we were not celebrating.

The day had sucked. Terrible culture. Roadblocks for everything. Lack of will in the office to do anything at all. It was clear we'd been hired because we were award-winning authors but not, exactly, to do anything. The culture was malevolent. Change - no matter how positive - was not likely.

On that day, we decided that life was too short to waste on failure and frustration. That evening, we shifted our focus to three areas of human endeavor: *release the individual from overload, work with teams that foster mutual support, and find organizations that have an intentional world-view.*

We want to help people work better, not gather logos for our sales page.

Since then we have specifically sought out organizations that actively make the world a better place, have an intriguing culture, and / or have a unique business model. Any one of these is a gift we'd like to support and is a foundation upon which to build healthy working environments. At its very core Modus exists to support creative and profitable human endeavor.





## Express Through Who:

People are why we are in business. They are why we get up in the morning. People, ultimately, are the why of everything.

So, we at Modus are also "People." Jim Benson and Tonianne DeMaria, we've run Modus Cooperandi for a decade, creating new ways of working (Personal Kanban, Lean Coffee, Modus Method, Kaizen Camp, etc.), writing popular books, and being fortunate enough to work with some special companies / agencies at special times (Spotify, The World Bank, United Nations, Turner Construction, Legal Seafoods, Limeade, Trimble, etc.).

We are systems thinkers, which while that might sound dry, our approach we've been told is anything but. At the heart of all work is motivation and clarity.

*Do we understand what we do, why we are doing it, who benefits, and how can they benefit more?*

*Do we understand our own personal roles in making our companies and our colleagues more successful?*

*Does our work excite people?*

These are the foundations of a system of work - we find them fascinating and inspiring.

While this "who" may be Jim and Toni, we feel we can only describe our "who" through the people we've encountered. We are observers of human interaction...through process, behavioral economics, neuropsychology, Lean, Deming, sociology, through many lenses. We are looking to connect the individual with the meaning behind their work. To help them find that point where they specifically and pragmatically engage with others to create value. *Where they learn their own why.*

At that point, we find continuous improvement, we find design thinking, we find that moment where the people actually care enough to participate. This is the difference between organizational design and simple process coaching.

The rapid particulars of us are that we are Shingo-award winners, faculty members of the Lean Enterprise Institute, best-selling authors, recognized innovators in organizational design, outspoken critics of "boxed processes," business owners, product creators, popular speakers / instructors, and avid readers. We have backgrounds in fashion, urban planning, psychology, public history, government operations, and business ownership. We can also cook you an amazing meal, if that helps. The CVs are on LinkedIn.

But for the "who we are", we'll leave you with a quick story.



## Purpose at the Gates Foundation: The World's Shortest Case Study

At the Gates Foundation, there's a basement not unlike most basements. It's dark, it's dingy, even though the building is new. It's where they store their database team.

This team was literally begging for better process ideas to interact with the rest of the building (the people who worked where there were windows and light). We asked these people if they ever went upstairs. They said no.

We asked them what their mission was. "Maintain the servers," they responded. We smiled.

They stared at us. After a pause, we said, "No, like the mission of the Gates Foundation." They then rattled-off, *"That's ... Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives."*

We asked how that related to them. Perplexed they responded, "It doesn't, we just do the servers."

Toni literally looked like they'd stabbed her, it was so disappointing.

Each DBA related to a specific database. One was the water quality group, one was anti-malarials, one was education. These people were doing some of the most important work in the world yet didn't seem to realize it. They simply didn't identify with their own value.

There was no "process fix" that could help them.

We told them to get in the elevator and go to the huddles of their respective teams. They didn't understand why. We told them more loudly. They relented.

In only a few days, they found ways they could help their teams. Different data they could bring, analysis they could conduct, queries they could create, etc. They began to identify closer to the mission of the organization and their respective groups because for the first time, they actually understood their work. At that point, process became important. Clarity had to come first.

They went from administering databases to saving lives in under a week.

And that is our "who."



## Which Leaves What:

*What* we are might be even more of an existential question, but we'll try to keep it short.

Modus Cooperandi is a collaborative management consultancy that focuses on the value needs of the individual (professional pride), the team (creation with care), the organization (sustainable and responsible culture), and the customer (actions for a better world). By building a shared understanding of these needs, we can create systems that strive to continuously improve all four. We love what we do, feel profoundly fortunate to be doing it, and take it very seriously.

## And the How:

### Structure for Visits

No surprises for anyone, please.

Before we would book flights, we scope out the visit (who we'd see, what we'd teach, what exercises we'd run through, what we'd build). There's always room for serendipity after we arrive (better value is discovered), but we want to always start with a clear understanding of value before we arrive.

Either through email or a quick phone call, we'd agree on the scope of the upcoming visit and then arrange travel. Ideally we'd like to confirm 3 or more days. Two would be the minimum, if we start habitually booking two-day visits, we may need to charge something for travel time (simply because that two-day visit eats up an entire week with all-day flying).

The moment that either of us feels we are done, we will discuss it and see if it is time to pause or end the relationship.

We offer online training in Personal Kanban and Distributed Team Management with group rates and guided learning. Upcoming courses include Building a Learning Organization, Lean Knowledge Work, and the Toolkit (see above). These online courses provide for "slow drip" learning which tends to be more effective than drinking from the firehose.

## Contact Us

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