The Journey

A Case Story on Self-Assessment, Group Learning and Continuous Improvement

Frances Jørgensen
The Continuous Innovation Network

The Continuous Innovation Network (CINet) is a global network that brings together researchers and industrialists working in the field of Continuous Innovation. CINet is a continuation of the European Continuous Improvement Network, started in 1993. In 2000, the mission of EuroCINet was reformulated and its name changed to CINet, a research network on Continuous Innovation. These changes facilitate the dissemination, not just within but beyond Europe, of a new way of thinking about the integrated management and organisation of day-to-day operations, improvement and learning, and innovation and change.

The CINet PhD Network

CINet has developed a PhD network, which promotes research collaboration among PhD students and their institutions on topics of interest to CINet. In detail, the network objectives are as follows:

- To promote the development of research on continuous innovation and its applications to enhance companies' effectiveness and better use of human resources for more sustainable organisation of work.
- To facilitate research integration and mobility on a global level.
- To enhance research quality and, in particular, to promote synergy and collaboration on empirical research.
- To promote a better quality of PhD training and supervision.
- To promoting joint research programmes involving companies and academia offering the prospect of rigorous training and exposure of PhD students.

The CINet is unique for its focus on innovation management as well as for the specific vision that is shared by partner institutions concerning the role and potential contribution to innovation and improvement of human resources at all levels.

Characteristic for the CINet PhD network, relative to other PhD networks, is its strong emphasis on implementation and collaboration with industrial users. Students work in close collaboration with companies to analyse and solve management problems. Research designs involving in-depth empirical studies and action or clinical research are therefore encouraged. The PhD students involved in the CINet receive an intensive training to cope with concrete management issues. All the students who were so far rewarded a CINet-based PhD degree easily found their way to highly valued positions in industrial companies, in research institutes or as consultants.
Previously published in this series:


THE JOURNEY:
A CASE STORY ON SELF-ASSESSMENT, GROUP LEARNING
AND CONTINUOUS IMPROVEMENT

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A Foot in the Door

To say I was both excited and nervous about presenting the project plan I’d been working on for almost a year to a company would be a major understatement. There was a lot on the line here. Even though I believed the plan was really good, it had to be put into action if it were to lead to a Ph.D. degree.

I was a consultant for several years before starting my Ph.D., so this was definitely not the first time I’d prepared a presentation for members of top management. But this was my first time to visit a Danish company and it was the first time I was taking the lead. In consulting, the company makes that first call, which means they are the ones with the problem so they are the ones asking for help. As a researcher with a project plan in hand, I had to be able to convince the powers-that-be that I could offer something they needed. In other words, the first meeting in the company would involve a sales pitch!

On the positive side, I should admit that this wasn’t a totally “cold” sales call. There are surely lots of ways for a researcher to come in contact with a company in order to conduct research. In my case, a senior researcher from my department knew the director of a production facility who just might be interested.

The company is well known and had been written up in the papers many times over the years. Most importantly, they were known for their work with shop floor team development and had implemented a continuous improvement program several years ago. Per, the director of production at the company, was contacted and sounded quite enthused. A date was then set for the big presentation.

I decided to send a short description of the project to Per about a week before we were scheduled to meet, so that he would have a few more details about the project than he’d got on the phone with the senior researcher. The trick with the description was to include enough information about what I wanted to do, why it was something worth doing, and how I planned to do it to keep him interested, but not to sound so academic that it would turn him off to the project. In my experience, this is a fine line because mere mention of the word research can make some managers want to turn and go the other direction.

Apparently round one of the sale’s challenge was successful. I received a reply from Per within just a few days. He wrote that the project plan had been sent to the other members
of the “production’s top management team” and that seven of them would be at the presentation I had planned with my major research advisor, Frank.

The Presentation

Although I’d heard a lot about the company and had certainly bought its product, I had never been to the plant itself. The company isn’t considered especially large by international standards, but there is a definite sense of "grandness" when entering the property. The plant includes several large buildings spread over an area roughly equivalent to two city blocks. The entrance to the main building is marked by a sizeable, modern abstract sculpture donated by the employees of the company to commemorate 75 years of business.

The lobby area is quite spacious and open, providing visitors with a view of the reception area, corporate offices, and several large and expensively furnished meeting rooms. Knowing that top managers’ time is always at a premium, I couldn’t help but feel a bit flattered over how many would be participating in this first meeting, and over their job titles. Frank and I were shown to the largest of the meeting rooms and within a few minutes, the head of production planning arrived. He presented himself politely and then sat down to read some documents he had brought along. Shortly thereafter Per, five other department managers and a representative from the international human resource office filed in. The managers created quite an impression as they entered the conference room. Precisely on time and prepared with the copies of the project plan, each wore neatly starched white laboratory coats embroidered with the company logo and matching head covering.

Considering the stylish appearance of the meeting room, the lobby, and the plant grounds, I believed the managers’ wardrobe to be symbolic—intended to provide visitors with an impression of solidarity and commitment to the company. Several weeks later I realized that this wardrobe was required according to sanitary regulations for the production area, which was located between the managers' offices and the conference room.

After brief introductions, Per started the meeting with a prepared presentation of the company’s history, its product line development, and the current organizational structure and strategy. From the organizational chart, we could see that the production area is really only one component of the company as a whole, but the major divisions somewhat isolated so each is run almost as if a free-standing company. The “top management team”, as they were referred themselves, direct only the production facility. As director of
production, Per is the link to corporate management teams and the remainder of the organization. In most companies, the term “factory management team” might be used to refer to the production top management team attending the presentation.

Frank took the wheel next and explained a little about our research center at the university and some general aspects of how the Ph.D. research projects are conducted in cooperation with local industry. Then it was my turn. Even though they had all received a copy of the project plan, I decided it would be a good idea to recap the main ideas behind the study. First, I gave a rather academic definition of Continuous Improvement, or CI as it’s called. Then I said, “What this basically means is that everybody works at finding ways to do their work a little bit better”. I added, “I’m sure you all know that just because something sounds simple, that doesn’t mean that it is easy to make work”. That got quite a few nods and smiles so I could see they were still awake and following with me.

I then moved on to explaining the idea behind self-assessment: that it is a way to evaluate how groups in the company are doing in terms of their CI implementation. I gave a little background on the Continuous Improvement Self-Assessment Tool, which has gratefully been shortened to “CISAT”, and told how it is being used in several companies in Denmark. I never took a marketing course, but I think this is a sales technique referred to as “band wagoning”. Tell the potential buyer that everyone else is doing it or has bought it, and he’ll want to jump on board. That honestly wasn’t the purpose in this case. I just wanted to let them know that while this was research, other companies have used the tool.

If there were to have been drum roll sound effects to the presentation, they would have come when I explained my conviction that using facilitated self-assessment with shop floor teams would lead to learning that would in turn lead to more improvements of the work processes. Per smiled warmly and there were a few more other nods in the room, so I proceeded on to the actual project plan that showed how often I would expect to be in the company, what I’d do while there, and what everyone else would be expected to do. Even though the company wouldn’t be paying for my time, the project would end up using about 30 minutes each week of their teams’ time plus a few hours of the team leaders’ time, over the course of about four months. Added to this, the top management team would be expected to participate in a “steering committee” that would meet two-three times in all to discuss the progress of the activities with the teams.

All of my cards were basically out on the table at this point so I opened the meeting up for questions. One of the managers asked whether the CISAT would be appropriate for their shop floor employees, given their relatively low educational level. Per quickly backed this question up by saying that they’d had problems before with some of the training they’d tried with the teams. He explained, “We hired an outside educational consultant to come in to find out what was wrong and his report showed that up to 60% of the operators have reading problems and/or suffer from dyslexia. Most of the training manuals we have were written in English”. English is not the operators’ native language.
I reassured Per and the manager that the tool had in fact been tested in production, but that I had also built in a lot of time into the plan to make sure everyone understood the materials. Because the questions on the CISAT would be read aloud by the team leader and discussed as a group, I didn’t expect reading skills (or lack of) to be a problem.

No one else had any questions, so Frank and I took the lead again and began to ask for some more specific details about the types of training and development that had been done with the teams and how familiar employees were with the concept of CI.

It was Per that again responded to our questions. He explained that the company had built up a strong reputation for being on the forefront of development, especially as related to team and employee development. He continued by saying that the company “does all it can to support personal and professional development all over the organization…and for this, we are known as a highly desirable workplace.”

When it was clear that there wasn’t more to add, I told the managers that I felt that their company would be an ideal setting for my research and would feel privileged to work with them, in the event that they accepted the proposal. Per promised “the team would discuss the project” and get back to us soon.

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**First Impressions**

Whether we like to admit it or not, we all judge people at least a little by the clothes they wear, the cars they drive, the houses they live in and their job titles. It’s no different with this company. The property, the décor, and the starched white uniforms give a memorable first impression even before the first introductions are made. There was a palpable sense of strength, success, and unity that impressed me. Still, just like with most first impressions, I knew that it’s dangerous to judge a book by its cover and time would tell whether my first impressions of the company would be accurate or not.
All Aboard!

Not more than a week went by before Frank received “THE LETTER” from Per stating that top management team had approved the project plan and would like to meet again to discuss the details on how to proceed. In the letter, Per also suggested that the team might benefit from completing a self-assessment themselves, so that they could gain a better understanding of what would be done at the shop floor level.

At this second meeting, six top managers, a project manager, Per, and his administrative secretary were present, along with my co-advisor, Harry, and I. Some of the top managers could not be present, but others were, so there were three new faces and three I recognized from before. The project manager, Milo, was presented as my liaison for the duration of the project. Per explained that Milo would be arranging a plant tour, scheduling initial meetings with the appropriate persons, and helping with the practical details.

The setting for this meeting was identical to the first, but it had a slightly different feel to it. The administrative secretary with her laptop ready to take notes and plan meetings certainly created the impression that we were now about to get down to business.

I was told that two departments had volunteered to participate in the study, via their respective department managers who were members of the top management team. As Per made this announcement, the two managers nodded silently. Per explained that while it wasn’t planned this way for the research, the two departments represented the first and last steps of the production cycle: where raw products were received and processed and where the finished products were packaged for shipment to the customer.

While Per continued to describe the two departments, I could almost hear a line being drawn down the middle. The processing department was on the good side, with high performance records and low turnover. The packaging department was on the bad side, always running seriously behind schedule and making costly mistakes.

I couldn’t help but notice how everyone glanced quickly at the top manager who had responsibility for the “bad” department. He looked younger than most of the others in the group and blushed a little before saying, “I only got that department added under my responsibility four months ago”.

Since there were a few newcomers to the meeting, I explained a little about the research to the top management team as I handed out the CISAT questionnaire. I then went on to explain how the items on the CISAT are scored.

With the shop floor teams, a great deal of time would be used to discuss the individual items, but in the interest of saving time, Harry and I had decided that we’d talk through only one set of questions. The remaining questions could then be answered individually by each of the members of the top management team during the upcoming week.

The group of questions from the CISAT I’d chosen to read aloud all had to do with the degree to which “the individual employee and teams use the company’s overall plans (goals and strategies) to choose areas for CI and to prioritize their efforts.” There were five items in all having to do with this subject. Each item was read aloud to the team and I asked for examples from the company before they marked their responses.

Per was able to come up with several examples of how CI activities were planned and implemented according to the company’s overall goals, but the others didn’t have any first hand experiences to share.

Milo asked if I was sure that the teams would be able to understand and fill out the questionnaire. I quickly recapped our discussion from the last meeting and said that I expected that the same questions the top management team had answered and discussed in less than 10 minutes would take as long as 30 minutes with the shop floor teams. He started to respond, but was quickly interrupted by Per who said “We’ve talked about that already. Let’s move on to the planning”.

Per then asked for me to explain again how the team leaders would be involved in the CISAT process. I told him that two “train the trainer” workshops for the team leaders were planned so that they could become familiar enough with the tool to lead the shop floor team meetings each week. What this meant was that the team leaders would be completing the CISAT and there’d be enough time to discuss many of the items, but it would not be discussed to the degree I’d planned with the shop floor teams. Also, the focus of those workshops would not be on the team leader group’s CI development, but rather on how to facilitate the shop floor teams’ activities. I explained that I would be present at all the team meetings and would help to facilitate group discussions, but that having the team leaders run the show would help ensure that CI continued after the project was over.

The top managers sat through my explanation of the team leaders’ role in the research without saying anything, but I could feel that this wasn’t really the answer they were looking for. Sure enough, when I was finished Per asked if it would be possible to involve the team leaders in their own assessment process to find out “what is going on with their team”.

He then said that this team leader group—the middle management team he called them—had never really functioned well together and the top management team considered them “a serious barrier to improvement and development in the company”. It was the top
management team’s hope, he stated, that the project would also target whatever problems were occurring with the team leaders.

Running a self-assessment process with the team leaders, or middle management, had never been part of the research plan. On the other hand, I really wanted to do my research in this company. My brain started shifting gears pretty fast to figure out how to make them happy without biting off more than I could chew. Harry then proposed that the workshops originally planned to orient the team leaders with the CISAT process could be expanded to include an assessment of the group’s own CI development. Then other workshops could be planned to strengthen any of the team leader group’s weak areas uncovered by the CISAT.

Per and the others seemed satisfied with this plan. I then asked if they couldn’t tell a little bit more about what had been going on with the team leader group that indicated a problem. Per told us that it seemed like the team concept worked well at several levels in the company. He said, “The shop floor teams have come a long way and things work as they should between the teams and their team leaders. There is good communication and cooperation in this team, too. But it doesn’t work at the middle management level.”

I asked, “How do things work between your team and the team leader group?” Some of the managers looked at each other before one said, “On a one to one level it’s ok, but we don’t feel they work together like a team should”. Per added, “The whole idea behind making them a middle management team was so they could take over the daily production planning that we [top management team] have always done, but they only think about their own departments. The team leaders asked if they could assume that responsibility and we decided it was a good idea, but it’s not working like we’d expected.”

I then asked when the team leader group had been made a team. Per answered that it had been at about three months before, when top management and the team leaders were at a planning retreat. I responded immediately by saying that three months wasn’t very long to expect team functioning in the group.

I then asked what kind of training the team leaders had participated in and was told “They all got training about five years ago, when the operator shifts were made to teams”. I asked if this was “coach training” to help them make the transition from shift supervisors to team coaches, or if the training was intended to help the team leaders become a team themselves. I was told that it was basically the former.

One of the top managers commented, “We assumed that if they could coach the operator teams, they should know how to be a team.” I then asked what happens when a new team leader is hired, if they were offered similar training. The answer I received came from the human resource representative, who said “We try to hire team leaders with experience with teams.”

I was starting to get an idea of what at least some of the problems at the team leader/middle management level could be, but decided to wait until I’d met them before mentioning my suspicions.
We used the last minutes of the meeting to iron out the details for the project. One “detail” that hadn’t been mentioned so far was a company policy that restricted any kind of training and development to the low season, which had started about one month before and ran for another four months. The research was clearly viewed as training and development and so it had to be started immediately in order to get the full four months of team meetings into their schedule. Per assured me that it would not be a problem to come back and do follow up interviews and observations during the high season.

We made arrangements for members of the top management team that had not been able to attend the meeting to receive the CISAT questionnaire and for me to pick them up and score them before the next meeting.

Harry and I then suggested that a “steering committee” be formed with two or three members of the top management team, Frank, Harry, and I. He explained that this committee would keep tabs on the progress of the research activities and make changes to the plans if that became necessary. Per surprised us both by announcing that he would be leaving the company within a month. He suggested therefore that his successor and Milo should comprise the steering committee members from the company.

Beyond the Presentation

Comparing the notes I’d taken at the first meeting with those I’d taken at this second got me thinking about how we give out information about ourselves in bits and pieces and in stages. At the first meeting, I was given the “official presentation” of the company. The picture was most definitely a rosy one. After we’d all come to know each other a bit better in this second meeting, the rosy picture began to show signs of stress under the surface. The team leader group was not living up to expectations and the director of production was leaving the company. Harry and I didn’t know him or anyone else in the company well enough to ask if this was by his own choosing or not. In any case, what the company presented during this meeting was considerably different from what it presented initially.

Is this unusual? Probably not, I imagine. I think it is natural that we carefully select what we tell others about ourselves. We tell what we think is relevant for the given situation. We then add little bits of information as needed. When I first meet someone and begin to tell about myself, I tend to mention only the positive things. I’d have to know someone pretty well before I started talking about the mistakes I’ve made in my life! I guess I did the same with the company when presenting my research. I provided a very rosy picture
of the research, not mentioning all that isn’t known about CI nor the uncertainty I’d felt during a year of planning this project.

The View from the Top

Before the next meeting I’d collected and scored the completed CI questionnaires from all twelve of the members of the top management team. Per, Milo, and seven of the top managers were present at the third meeting, which was held for the purpose of reviewing the CISAT results.

The results of the CISAT are given in a colored diagram with ten small squares across the bottom, representing sets of CI behaviors, and five squares up in columns, representing the level of development for the behaviors. All of these squares are color coded to give the idea of a “traffic light”. Green means all systems are go; red means stop, there’s a problem here. Yellow means watch out, we need to take a closer look at what is going on.

It didn’t surprise me or the top management team that their traffic light was mostly green. Whether CI development in the company is actually so green or not, I couldn’t say yet. But I believed that from this teams’ viewpoint, most everything looked fairly green. Or at least, I expected that is how they would describe it.

The two noticeable exceptions on the traffic light were red squares for CI development in the areas of cross-functional cooperation and learning. I asked the team to try and tell me why they thought these were weak areas in their company.

Per said, “This is what we were saying at the last meeting. Those squares are red because the team leaders can’t work together.” I then asked the others in the group if they agreed. A few nodded their heads, but no one spoke.

I asked, “When you answered items in this section, were you mostly thinking of the team leader group or were you thinking of your own team?” Almost everyone began shuffling papers to the items I was referring to. I quickly replaced the traffic light overhead with one in which the low-scoring items were printed.

After a few minutes to refresh their memory, they seemed to agree that they had been thinking mostly of the team leader group when they responded to these items. So I asked about the section on learning, which was also red. I put the overhead with these items up
on the projector. Again, I was told that they had the team leader group in mind when marking their responses.

Per said, “They fight fires: they make the same mistakes time after time. They don’t learn from mistakes”. I was then curious what part of the organization they’d had in mind when responding to other items on the CISAT, as most were green.

Again it was Per who responded: “As top management, we have to look at the organization as a whole. We answered based on how we see things in the whole company, not just in our team. We function effectively in our own team and most of the company functions well. It’s the middle management team that has the problem.” His way of using the word “we” made it sound like the team had discussed the questionnaire outside of the meetings, but I tended to believe he just spoke as if they all shared the same thoughts.

At the end of the meeting, Milo said that he “would communicate the plans for the project to the team leaders and set dates for the workshops” within the next week. We also arranged a time for Milo to give me a plant tour and see that I was given a uniform and pass key. We decided to wait until the new director of production had taken over Per’s office before scheduling any more meetings with the top management team.

A Team at the Top

Per had referred to the top management group as a team since our first meeting and this in itself was a little intriguing to me. Sometimes the word is used loosely and just means a group of people assembled for some reason or another. When I use the term team, I mean a group of people with a shared purpose for being together and who work cooperatively to achieve that purpose. My experience with top management “teams” has mostly been with the former type. I’d rarely seen what I considered real teamwork between top managers. This also appeared to be the case in this company. Per led the meeting as any CEO would. Unless things were very different at other meetings or in the everyday functioning in the company, the word “team” didn’t mean much more than group in this company. It certainly caused me to wonder what would happen when Per left the company.

During the next week, I was at the company to meet with the administrative secretary and Milo. The plan was for us to work on the scheduling and for me to get my uniform and key. I was also given a desk in the main administrative area, where I could sit and write between meetings. I was settling into my new desk when I realized several people were
gathering right outside Per’s office to wish him well in his new job and to say goodbye. They had made a laminated card for him with signatures from everyone in the top management team. It looked like about half of that team was there outside his office. Only a few of the employees from the administrative area went over to say something to Per; the rest stayed at their desks. I wondered if there would be some type of “farewell party”, but after a few minutes everyone returned to work.

It didn’t seem like a lot of fanfare for someone who had held the top position in the plant for more than six years.

Where It All Starts

January 4th: The start of a new year and my first day out on the floor of the production facility. Milo had arranged for one of the two team leaders in the processing department to show me around their work area. Afterwards, I was to meet up with Milo again for the rest of the tour.

I’d been to the plant three times already in December, but so far only for meetings with top management. I’d been nervous before the first of those meetings when I was trying to sell my research project to the director of production and the department managers, but after my old self-confidence returned after just a few minutes in the fine meeting room and I knew I could handle the presentation just fine.

Here on the shop floor there is another feeling all together. This is where the action is – the machines are running or standing ready. Raw materials are being churned in giant shiny steel drums. And this is the home of the shop floor operators.

I remember years ago when I first started consulting in manufacturing companies. What drew me away from the corporate offices and out onto the shop floor was the raw honesty of the technicians and operators who spend eight hours every day doing their part to get a product out the door.
I realized today that this honesty could also be a scary thing. When I first walked out on the floor with Jan, the support team leader, I was dressed just as everyone else. I wore the lab coat, head covering, and work shoes I’d been given and I had removed my jewelry and watch according to the safety regulations. But I knew that the few shop floor operators that stood around their machines didn’t have to see the word “guest” embroidered on my coat to know I was an outsider.

Normally this area of the plant is off limits to guests, Jan explained. I probably looked like an inspector of some kind, with my notepad and pen in hand. I tried to smile to the first operator we approached, but he quickly turned to the computer screen that controlled the giant machine behind him. From that point on, I could almost feel his eyes on me as we continued the tour.

As we walked through the plant, I remarked on how clean and neat everything appeared. Jan replied proudly, “Our department has the highest housekeeping rate in the entire production facility. Some of our machines are 15 years old, but we keep them painted and washed down, so they look like new.”

I took some notes as we walked through the warehouse, where the raw materials orders are received and stored. This area of the plant is actually the starting point for the whole chain of production. There weren’t any operators in this area and so far and I’d only seen three out on the floor. I asked Jan if many of the operators were still on Christmas vacation and was surprised when he explained that this department, which is separated from the main production facility by approximately one kilometer, has only 35 operators divided into four teams: day, evening, night, and weekend.

There was also a mechanic’s shop with three full time mechanics attached to the department, but as Jan explained laughing, “We mostly only see them when there’s a problem, if then.”

By the time the tour ended, I had a general idea of what goes on in the department. The four to eight operators on each shift use the computers attached to each of the machines to punch in product codes that are listed on their daily production sheets and then fill the steel tanks with the appropriate amounts of raw materials. From that point, the machines basically run themselves for up to three hours, but there are set pauses once or twice during a cycle when other raw materials are added. Once a cycle is finished, the base product is removed from tank, stored briefly, and then loaded onto trucks that provide transport to the main facility.

Jan suggested that we walk over to the office to speak to Ralph, the head team leader, about scheduling times for meeting each of the teams. Ralph was sitting in front of his computer as we walked into the office. Aside from an overflowing ashtray, a picture of his smiling family, and a few papers, his desk was relatively empty. Jan’s desk was cluttered with technical drawings and reports. As if Ralph read my mind, he said, “You can see who does the real work here, can’t you? Jan is the brain out here, so everyone knows to send all of the important stuff to him. I’m the people man.”
Jan quickly explained that as a mechanical engineer, his primary responsibility was in optimizing the technical processes in the department. Ralph followed by saying, “I’ve been with this department for nearly 15 years, with the company for more than 20. Jan’s been here for 1½ years, but we sure hope we get to keep him. We make a good team.”

I sat down beside Ralph’s desk and took out my calendar. I had sent Ralph and Jan a copy of the project description a week earlier, so they already knew a little about what was planned. Ralph explained that the operator teams did not conduct team meetings, per se, but rather “meet throughout the day as needed”. We quickly penciled in times two days later for us to meet and present the project to the day, evening, and night teams. The meeting with the weekend team was scheduled for the following Sunday.

Ralph said, “Those are going to be some long days for you: the day team at 9:00 a.m., the evening team at 10 p.m., and the night team at 11:30 p.m. Are you sure you don’t want to run them over a few days instead?”

I assured him that since it was just one day out of the week, I’d manage. But I asked, “What about you? You can’t possibly be here from 7 or 8 in the morning until after midnight.”

He explained that he usually went home in the mid-afternoon, after speaking to the evening shift for a few minutes, to eat dinner and spend time with his family. He then came back after his kids were in bed to see how the night team was doing. He added proudly that the teams in this department were “self-directed production teams long before the term was ever used in the company” and “they could just about run the production on their own”.

He tapped his mobile phone and said, “They know they can reach me night or day and during the weekend, if there’s a problem.”

Before leaving, I asked for both Jan’s and Ralph’s telephone numbers and email addresses. Jan glanced quickly at Ralph and then to me before saying jokingly, “You better put an urgent symbol on any email you send to Ralph. Otherwise he’s not likely to read it.”

Ralph answered playfully, “Now you’re going to give me a bad reputation before she’s even had a chance to get to see for herself what a nice guy I am. If you send an email, I’ll read it, but we get so much mail around here, I can’t promise when. If you need to get in touch with me, best to call me on my mobile.”
Pride

Ralph’s department and his teams had been described as “the stars” by more than one of the top managers and even though I hadn’t met the operator teams yet, I was beginning to understand why. I liked the way Jan and Ralph joked with each other. Their office had a nice relaxed feeling to it, even though it was clear from the housekeeping records and the teams’ reputation in the company that they took their jobs seriously. I left the department with a good feeling about working with these two guys and their teams.

The Grand Tour

Milo came back to the processing department right as I was finishing up the scheduling with Jan and Ralph. We drove the short distance up to the main facility and then walked through the plant to the area in which processed raw materials are received from the processing department. Milo described the different coding and storage systems as we walked through the area. Just as in the processing department, I was struck by how little activity there was in this area.

Milo explained that most of this process is automated, so that when a truck arrives the materials are directly transferred to large vats connected to the next stage of the production process. The only interaction between the two departments was when the driver from processing handed over a delivery report to someone in receiving. If no one was around, the report could be attached to a clipboard by the door and signed later.
I asked, “How did things work before you became so automated? Were there a lot more operators?” Milo said, “Things run a lot more smoothly now and production has increased steadily. We’re proud of the fact that we’ve never had a company-wide lay-off.”

The tour through the rest of the plant went quickly until we reached the packaging area. I wouldn’t be working directly in any of these other areas so the idea was just to give me an overview of the production process. I was struck with a little bit of the same awe I usually feel when touring a manufacturing plant. You just never realize how much goes into making a pretty simple product until you’ve seen it under production.

The major difference between this company and the one’s I’d been in before was how few workers were out on the floor. I admit I haven’t worked in any companies where the technology was so automated, but it seemed like there were machines sitting still in every department. I asked Milo if this was normal or if production was down due to the holidays and he answered shortly, “There should be a lot more machines running; maybe they’re not on full shift schedules yet”. He seemed a little irritated that I’d asked, so when we came to the next department where literally nothing was happening, I kept quiet.

Finally we arrived at the packaging department and I was introduced to Wally, the head team leader of the department, who would show me around while Milo made some phone calls. Wally walked me through the department, which is about the same size as the processing department.

There are ten large packaging machines in the area, plus an area for receiving and sorting the finished products and one for holding the packed crates waiting to be moved to the shipping department. Beside each machine there are two large waste receptacles: one for products which must be reprocessed and another for products that will be thrown out. I glanced quickly in them as we walked through and noticed many were almost filled. I asked Wally if waste was a big problem and he answered, “It used to be, but now we have some customers that buy our recycled products, so that helps a lot.”

I figured I’d wait until I knew him a little better before asking about the “throw away” bins that were just as full as the recyclables. We ended up back at Wally’s office where he gave me a list of the operators’ names, their work schedules, and a plan for the four months of team meetings. He was definitely well organized!

On top of the schedules, he gave me a list of the productivity goals for the department and the current production records. I’d noticed these were the same as those hanging out on a shared bulletin board in the middle of the packaging area. Wally explained to me that his teams were just starting a two-week training course at a local community education center, so he’d planned for me to introduce myself and get started down there during the following week. At least knowing that the teams were in training helped explain why I hadn’t seen anyone working.

Milo suddenly appeared again as if I’d pushed a button to let him know I was finished. We then left the production area and walked towards the employee cafeteria that was
about midway between the plant and the reception area where I’d met with the top management team.

Along one long corridor there were rows and rows of pictures of employees that had been at the company 20, 30, and even 50 years. I stopped and gazed at the pictures for a minute, giving it the respect and attention it seemed to command. The cafeteria itself is very spacious, with floor to ceiling windows overlooking open fields and a small lake. Like the meeting rooms and reception, it is very tastefully decorated. Milo pointed out where a new production facility would soon be built. There were walking trails around the lake where employees could “get some fresh air”. It was early January in Denmark at this point, so it wasn’t surprising to me that no one was taking advantage of the trails right now.

On the other hand, I was surprised that there weren’t more people in the cafeteria. I looked at my watch and saw that it was just a little after 12:00 and the food smelled good. Still, there were at most 20 people spread out over eight to ten tables. I didn’t recognize anyone from the processing or packaging departments and thought those eating looked like they might have been from the sales and marketing departments rather than the production.

I asked Milo about this and he said, “Everyone from the facility is welcome to eat here, but lots of the operators choose to eat in their own break rooms.” I then pointed to a lovely atrium adjacent to the cafeteria, where there were several smaller “dining” tables set with linen table cloths and china, and asked who ate in there. Milo answered, “It’s used when there are business lunches. That way, the glass partitions can be closed so that meetings don’t disturb anyone eating here in the cafeteria.” Or so those in the cafeteria can’t hear what is being said in the meeting, I thought to myself.

Milo would be attending the team leader workshop with me the next day, so we arranged when and where to meet before I left for the day.

To get back to the parking lot, I had to walk past the “picture hall of fame” again and I stopped a minute to tally up how many faces were smiling down on me from the wall. I couldn’t shake the feeling that there were more people up there on the wall than I’d seen in all of the times I’d been to the company. I glanced down both ends of the empty hall. It was almost one o’clock and so far no one else had gone into the cafeteria and it was
now totally deserted. I wondered why they had built such a big shared dining room if most of the employees preferred to eat in their own break rooms. For that matter, I wondered why they preferred eating in the break rooms, when they had access to such a nice cafeteria.

The Black Sheep

I have this little ritual of “putting assumptions in a box” when I’m about to meet people I’ve heard a lot about. I thought it was a good idea to do this as Milo and I walked to the training rooms where the team leader workshop would be held. After all, I had met Jan and Ralph from processing and Wally from packaging and my initial impressions had all been positive. Still, this middle management group was clearly the “black sheep” in top management’s eye and I didn’t want their opinions to influence mine.

Only two of the team leaders were in the training room when we arrived; the other eight came in a few minutes later, either alone or in pairs. They seemed chatty with each other and Milo cleared his throat and glanced at his watch several times before everyone was quiet enough to start. Milo quickly introduced me and asked the team leaders to give me their attention during the next two hours. He then excused himself, saying that something had come up and he wouldn’t be able to sit through the workshop as planned.

I went through my now almost automatic presentation of the self-assessment tool and what it is used for. I explained that while the top management had participated in a rather abbreviated version of the self-assessment and the shop floor teams from two departments would be conducting a much more in-depth process, these team leader workshops were intended to fall in the middle. Almost under his breath, the team leader with “Bart” printed on his lab coat, said “Forever the middle child”.

Most of the other team leaders chuckled quietly and then looked a little embarrassed back at me. I took it as a good sign that they had a shared joke. I made a mental note to consider the meaning behind the comment once the workshop was completed.

We basically followed the same process with the CISAT that I’d used with the top management team, but I had made overheads of all of the questions and we read and talked about most of the first items on the first few pages on the questionnaire. When they gave examples of some of the CI activities that had been implemented, I could hear that the team leaders had a real problem remembering that they should relate the items to
their own team leader group instead of the shop floor teams that each of them managed. After I’d reminded them several times, I decided to stop with the questionnaire items and probe them a little about their “team”.

There wasn’t anyone in the group who appeared to have a problem talking, but they all seemed to have trouble discussing their group as a team. I asked what kinds of activities they were involved in as a group and was told, “We have planning meetings three times a week, but it’s rare we’re all there together.”

I asked why this was the case. Jan from processing answered, “We are just busy running in all directions all of the time and there are so many meetings. We just can’t always make it to all of them.” I remembered how little work seemed to be going on out on the floor during my tour, but didn’t mention this yet. Instead, I asked about the purpose for those meetings and who had decided they should meet three times each week.

Bart answered this time, saying “I think it was the planning rep that suggested we meet so we can work out the production scheduling for a few days at a time.”

Ralph quickly added, “But he comes with the production schedules and reads them, we take some notes, maybe ask a few questions, and then we all leave again. If I can’t make a meeting, I just stop by his desk and get a copy of the schedule. If he needs to talk to me, we can do that then.”

I then asked, “What would happen if the meetings were never held?” They looked back and forth at each other, raised an eyebrow or two, then answered in unison, “Nothing”. So I asked, “What has changed for each of you since you became a team?” Wally questioned, “Do you mean, since the shifts became teams?” I said, “No, I mean—this group—the ‘team leader team’”. He shrugged and said, “We have a lot more meetings”.

I then said, “I feel kind of silly saying ‘the team leader team’. Does your team have a name?” There were a few nervous laughs but it was clear they had never really thought that their team should even have a name. Chris, one of the younger team leaders, suggested that they were most often referred to as “something like middle management team leader group”.

Wally laughed and said, “Let ‘em try putting that in the ‘to’ field on their emails!” I could see that we weren’t really getting anywhere at this point, so I suggested we take a short break before returning to the CISAT questionnaire again.

I stayed behind a few minutes looking over my notes for the rest of the workshop, so the team leaders had already poured themselves coffee were standing around talking by the time I walked out to the break room. I took a cup of coffee and walked over to them, hoping they wouldn’t see me as intruding on what sounded like a fairly emotional conversation.

A few of the team leaders smiled at me and shifted a little so I wouldn’t be standing on the sidelines. Ralph was talking most and his voice was raised a bit. He said, “That was
just a lousy way for them to handle it, if you ask me.” Sonya, the only female team leader, said, “Well, of course they won’t ask you or any of us.”

Ralph looked directly at me and said, “For all the talk of open communication here, they sure are good at keeping secrets.” I asked if “they” referred to the top management and Sonya replied, “Well, Per in any case. But nobody else dares say anything either.”

I knew I was taking a risk by asking directly what they were talking about, but I figured it was worth a shot since they had included me so far. Ralph explained, “We were all supposed to go to an external strategy meeting two weeks ago. The first morning was like a workshop. We were wondering where Kyle was—he’d been off the week before the meeting, but we thought he’d make it to the workshop. I asked Per, who told me that Kyle was sick. Kyle and me, we go way back and I knew he was having some problems here at work. So during the break, a couple of us called his house and sort of joking, asked him if he was playing hooky and looking for a new job. He told me that Per asked him to say that he was on sick leave but the truth was, he’d been fired.”

Jan interrupted saying, “We didn’t find out from Per that Kyle was fired until we got back to the plant two days later and nobody will tell us what happened or why.”

Ralph added, “Kyle says he doesn’t even really know why, just that Per said something about him ‘not fitting the manager profile the company’, whatever that means. I just don’t get why they weren’t upfront with us, telling us he was sick.” Sonya said that she’d heard that they’d waited until they were back at the plant because Per didn’t want them distracted during the strategy meeting.

Ralph shook his head and said, “I still think it was a crappy way of handling the situation. It sure doesn’t make it any easier to trust them. And this isn’t the first time one of the team leaders has just left without any of us being told. It happened before, during the summer.”

We all stood around a few more minutes but nothing more was said, so I suggested we take our coffee and go back to the training room.

The first part of the workshop had shown me that even though this group wasn’t really a team, they were all fairly knowledgeable about CI and seemed to understand how CI fit in with the company’s long-term strategy. They were able to list some systems and procedures that had been implemented to support CI, such as job rotation, more team-oriented hiring policies, shop floor team training and development, and an employee suggestion program. However, they were also in agreement that because of time pressures, no one really followed up much on how well these new systems and procedures were working.

We moved on to the second part of the CISAT questionnaire and at this point, the team leaders appeared to consider their own team leader group as context for their responses. Many of the short discussions of the items included somewhat defensive remarks about the lack of time for managing CI, both with the individual teams and at the middle
management level. For instance, when asked whether (top) management supported training and development at the individual level, Charles explained, “They support us 100% if we want to take a class or go to a workshop, but who has time for that? Who is going to do our work while we’re not here?”

I asked why they believed they were so busy, especially given that the plant was now well into its low season. Sonya replied, “When it’s low season, we have a lot of the [shop floor] team development going on and that takes a lot of time, with the planning and all. We have lots of operators on vacation or taking their overtime now and even though production is slower, we still have orders to be filled.”

Wally said, “It’s not even that. It’s all the meetings we have to go to. We have safety committee and union meetings and coordinator meetings and production meetings and a half dozen other ones that we are expected to go to. For every meeting, there is at least one report that has to be filed and then there are all of the production forms. I signed up for three management workshops last summer that are being held next month, but I’m probably going to have to cancel at least two of them.”

I asked about the meetings, whether all or most of the team leaders were attending the same meetings, or whether they were different meetings held in the individual departments. Ralph explained that it was a bit of both. About half of the meetings concerned all of the production teams and about half were related to the individual departments, although were generally concerned with the same subjects.

Sonya went on to say that the biggest problem with being so busy was not ever having time to think. She said, “You know that question about learning from mistakes? That requires having time to think about what you are doing, doesn’t it?”

I smiled and assured her that it did. She continued, “I feel like I go on autopilot most of the time, running from one crisis to the next. It’s only when I get in the shower or am driving that I realize that if I’d just had time to think about what was going on, I wouldn’t be making the same mistakes I’ve made 100 times before.”

Sonya’s eyes darted around to the other team leaders and I was relieved to see them nodding and agreeing with her so she wouldn’t later regret being so open with this group of men.

There was only about 30 minutes left in the time allotted for the workshop, so I explained to the group that I’d score the CISAT and present them with the results at our next meeting. The room became totally silent for a few minutes, until Charles asked, “What next meeting? We never heard anything about more meetings.”

This was one of those times that when it pays to have perfected a “poker face”. My mind raced back to the last top management meeting when Milo had been given the task of orienting the team leaders about the plans for a series of workshops. I had assumed the team leaders knew that this workshop wasn’t a one-shot deal and that we’d be meeting regularly over the next few months. It hardly seemed my place to be telling them that top management viewed them as the source of all problems in the company. I couldn’t very
well say, “Your boss says you need these workshops and so we’re going to hold them whether you all like it or not.”

They had just spent at least 10 minutes commiserating over how their schedules were so filled up with meetings that they didn’t even have time to think. Now I was supposed to tell them I’d be using up even more of their time. Still, holding these workshops was a major part of the “bargain” my advisors and I had made with top management, so I knew I couldn’t just walk away from them.

I looked out at the team leaders who were at this point just waiting for me to say something. I decided that being honest (but vague) and explaining my position was the best option, given the circumstances. Sometimes this approach even works.

So I took a deep breath and said, “Well, I had understood that you all had been oriented on the plans, which included this workshop as well as one to discuss the results of the CISAT. That way we could look at any problem areas your team might be having and then hold shorter meetings throughout the next few months to try to address some of those problems.”

I was barely finished with the sentence before Wally and Charles were saying that they couldn’t possibly find time for so many meetings in their schedule.

I continued by saying, “I can certainly hear how stressed you all are and the last thing I want to do is to make that worse. But after hearing some of the things you’ve shared with me today, I wonder if we couldn’t work together to find ways to reduce that stress.”

Wally said, “We’ve tried that route before. They hired some big bucks psychologist to come and talk to us during the summer and we spent hours talking to him, but nothing ever changed.”

I laughed and said, “Nobody is paying me the big bucks, believe me. But I’m not going to stand here and make any promises that everything is going to change for the better either. Really the only thing I can do is offer my time and help, if you guys want to try to work out some of these problems.”

Sonya turned to look directly at Charles and Wally and said, “We could at least take a shot at it, since she’s here and making the offer. It’s not like there is anyone else doing that. I for one believe we need some help.” I could see that they were at least considering what Sonya and I had said, so I sat down and waited.

A few minutes later, Charles said, “Can we schedule the next meeting to discuss the results, and then talk about where we go from there?” I cheered silently and said that sounded like a fine plan. I’ve learned to be grateful for small victories. On the way out of the door, I confirmed the times for the meetings the next day with Ralph. As he hurried down the hall, he yelled, “I’ll be there!”
The Middle Child

The idea behind “The Middle Child Syndrome” is that the oldest child in the family is treated as the responsible adult with all of the associated privileges; the “baby” receives the most attention solely because he or she is youngest; and the middle child is often forgotten in the middle. This “syndrome” has never been empirically supported and I’ve never been very interested in birth order predictions of personality or that kind of thing. But it was interesting to me that one of the team leaders would use this expression so spontaneously, as if he had given it some thought. Maybe the others that joined in on the joke had too. Did they feel like “a middle child” because top management had its “act” together and the shop floor teams were the ones getting all the attention in the newspapers? Did the middle management group feel like they’d been forgotten? I didn’t have any answers, but lots of questions were popping up in my head.

On the Floor

Until now everything I’d done in the company had been leading up to the main part of my research, which was the work with the shop floor teams. So far my time had been spent on tours and top management meetings and then the team leader workshop held the previous day. Now, almost three weeks since top management gave the project the go ahead, I was finally ready to meet the first of the shop floor teams and get started on conducting the CISAT.

Ralph and I had scheduled the first three team meetings to run from 9:00 a.m. to around midnight. Meetings with teams from the packaging department were scheduled during the hours in between. I knew it was going to be a long haul, but I was so pumped up about finally getting started that I wasn’t really thinking about that. I met Ralph in his office and
we walked together to the break room where we’d be meeting with the team. Ralph explained that there were two meeting rooms adjoining the production area, but that these were primarily used when an engineer or production planning engineer visited. The large picture windows that allowed for everyone to see in and out made me think of the glassed-in terrace in the lunchroom. It was also reserved for meetings with “important people”.

When I walked into the break room, I felt just like I do when I walk from my own living room into the part of house my two teenagers’ share. The production area shines it’s so clean: the break room is a cluttered mess. It’s quite small so the four Formica tables and metal chairs are crammed up against each other and the walls to make room for a bookshelf, sink, refrigerator, and coffee machine. Rarely dumped ashtrays, crumpled newspapers, and printed copies of emails and other reports were scattered on the tables, along with cups and plates from the operators’ morning coffee break. There was a bread basket of sorts on the bottom of a set of shelves. It was filled with packets of salt and pepper and ketchup, paper clips and markers, and a plastic stand-up sign bearing the company’s vision statement. I guess with the size of the tables, there just hadn’t been room to have the sign displayed.

There was a bulletin board on one wall with a (presumably ignored) bumper sticker that reads, “Your mother doesn’t work here so clean up after yourself”. There most definitely wasn’t space for an overhead projector, so I made a mental note to make copies of all of the pages of the CISAT questionnaire to hand out the following week. There are seven team members on the day team, but one was on long-term sick leave and another on vacation. Three of the operators were sitting at the tables, eating and reading the newspaper. Ralph used his mobile phone to call one from the stock room. He walked in a few minutes later with the last of the operators.

Once they all had a cup of coffee and sat down at the tables, Ralph introduced me and pointed to the project description hanging on the bulletin board that I’d sent the week before. I then proceeded to tell the team a little about myself, the research, and how their team leader and I would be meeting with each of the departments’ teams for about 30 minutes each week over the next four months.

I went on to explain a little about the CISAT and how it would measure their progress with CI and give some ideas for future improvement. I also told them that I expected to be out on the floor from time to time, asking questions about what they do so I could understand their work processes.

I looked up at the clock on the wall and saw that my whole spiel had lasted only about six minutes, but from looking at the operators it could just as well have lasted two hours. They had continued to eat, smoke, and read throughout the short presentation and only two looked up when I asked if there were any questions. I wondered if they had even understood a word I’d said, so I made a joke about my less-than-perfect Danish skills.
They laughed a little, so I at least knew that they were more or less awake. I asked about the best time for the next meeting and other than a few shrugs and glances in Ralph’s direction, no one answered.

Ralph then said, “Hey, this is your team and these are the types of things teams do. Don’t look at me!” One of the operators, an elderly man named Jesper, suggested that the same time each week would be fine. I wrote the time down in my calendar, asked again if there were any questions, and wondered if I shouldn’t apologize for disturbing their break before I left the room.

I walked back out onto the shop floor and looked around some, thinking that the operators would soon be returning to their machines. After about 10 minutes I felt silly standing there all alone so I walked back to Ralph’s office.

Jan was sitting at his computer and smiled as I walked in. He asked how the first meeting had gone. I said that aside from everyone being so quiet, I guessed it went ok. He assured me that the operators would relax some after they got to know me better. I thought to myself that if they got much more relaxed, they’d need to put recliners in the break room. I didn’t share my thoughts with Jan of course.

About that time, Ralph came back into the office and said that the team was really looking forward to the project and saw it as a chance to further develop CI out on the floor. I sincerely hoped the surprise I was feeling didn’t show on my face. Either the operators were really good at hiding their supposed enthusiasm or Ralph had a really active imagination!

Jan interrupted my train of thought by asking about Milo’s involvement in my research. I explained that he’d been appointed “project manager”, or liaison, by Per and that he would be coordinating the various meetings and workshops. Jan asked, “So anything that we talk about here in processing or in the workshops goes back to Milo?”

This of course is a difficult issue. As a psychologist, I feel strongly bound to respect personal privacy. As a consultant, I believe I had learned to carefully balance confidentiality with providing the persons who had hired me with information they needed to understand and solve their problems.

My role in this company is that of “action researcher”, which brings one more party into the picture, namely the scientific community. In other words, I would be required to not only share information with the top management of the company, but also to the public through papers and my Ph.D. thesis.

It was interesting to me that Jan hadn’t asked if I would be sharing information with the top management in general, but rather Milo in particular. In any case, I explained the dilemma the action researcher has in general and my own personal values concerning privacy. I ended by saying that I would never “name names”, would do my best to disguise the identity of those involved - regardless of the audience - and I would never repeat anything he or others told me in confidence.
I also assured him that I would go back to the source to verify interview data to make sure I wasn’t misquoting anyone and to give everyone the opportunity to have sensitive information removed from any written documents, including the Ph.D. thesis.

He seemed satisfied with my answer and said, “I don’t know if you are aware that Milo was team leader here before me and it didn’t work out, so I wonder about his motives.” I thanked him for the information and told him that I believed that Milo’s involvement would be limited to practical matters such as scheduling, but that I would take his concerns into account if that situation changed in any way.

It was soon time for me to drive the short distance to the Adult Education Center where I’d be meeting Wally and all of his teams. Because they were in training, the 48 operators were divided into 4 groups, each with 8-16 operators. When we arrived, the groups were arranged in separate rooms and were in the process of completing a worksheet provided by the course center.

While Wally introduced me to the first group, I glanced over one of the operator’s shoulder and could see that worksheet was entitled “team development dialogue”. I later learned that the objective of the course was to “focus the teams’ attention on how to set attainable goals through cooperative and participative discussion”.

Wally had planned to spend about 15 minutes with each of the groups as they completed the worksheets. I sat and listened while he talked with them about how they were to decide on a shared goal and then outline a plan for attaining their objectives. During the two days they’d already spent on this task, the nine night team operators in this group had expressed their goal as “to be the best team in the plant”.

Wally looked a little frustrated when he was told that they hadn’t yet been able to define any steps or milestones or ways to measure this goal. He looked around the group and then asked if everyone had participated in choosing the goal. One of the women said it had been a group decision that everyone agreed on. A few other operators nodded agreement.

He then asked if there had been any other suggestions for a goal. “No, this was the goal we all decided on from the start”, said another of the operators. Wally sighed audibly. Almost in unison, the group members dropped their heads as if they suddenly needed to examine the papers propped in their laps or on the table.

He said, “Who can tell me what it means to be the best team?” No one responded. Wally said, “That’s what I figured.” He tossed the papers he was holding down on the table. He then proceeded to describe the goal setting process he participated in with top management once each year and had just completed. He lectured for about 15 minutes before an operator raised her hand and reminded him that they were past due for their break.

I stood outside the classroom with a group of operators during the break. They were discussing a cake recipe one of the women had passed out earlier. I wedged myself into the conversation by mentioning that I’d tried a similar recipe my mother-in-law had given
me during the Christmas holidays. We compared notes a bit and waited until the designated 10 minutes had passed. I didn’t see Wally again until we were all on our way back into the classroom. He gave me the floor and I went on to describe the project as I had earlier that day with the day team in the processing plant.

No one from this team or the others I met during the next three hours had any questions concerning the project. In fact, the only times any one spoke while Wally and I were in the room was when he asked a direct question or when they were confirming who would attend which classes the next day.

By the time I was finished at the Adult Education Center, I was exhausted. It was only 4 p.m. and my next meeting wasn’t until 10 p.m. I drove back to the plant, took what was probably my tenth cup of coffee that day back to my desk, and began transcribing the notes I’d taken throughout the day. It was so hard to keep my eyes open and concentrate on what I was writing that I resolved to buy a tape recorder for days when there were so many meetings back to back. At least with a tape recorder I could just jot down notes to myself in English and know that the Danish translations could wait until I wasn’t so tired.

Not more than an hour after I’d left the last packaging team down the street, I received a call from one of the department’s operators, asking if I might be able to attend a meeting of the “knowledge center group” during the upcoming week. I’d never heard of this group on any of my visits to the company, but just the name of the group sounded interesting enough to me to set a time for the next day.

After a few hours of sitting at my desk, I decided to take a walk outside. It was bitterly cold, which is just what I needed to wake me up enough for the evening and night team meetings in the processing plant. When I couldn’t feel my nose anymore, I worked my way through the main facility to the cafeteria and sat down to eat the sandwich I’d brought from home. It felt a bit eerie sitting in the huge room all alone, now that there was only darkness beyond the floor to ceiling windows. It didn’t look like anyone on the evening and night shifts used the cafeteria either.

I arrived about 30 minutes early for the evening team meeting in the processing department. Ralph and Jan’s office was dark and since I hadn’t met any of the team members yet, I wasn’t comfortable walking around the plant floor looking over their shoulders. I decided to go to the break room and wait. I introduced myself to Paul, who was there having a cigarette. He said that he noticed the project description up on the bulletin board, but he wasn’t aware that this was the day for the first meeting. He hadn’t heard anything about Ralph returning to the plant that night.

At the time the meeting was scheduled to start, two more of the five men that made up the evening team had wandered into the break room. No one had heard that there was to be a meeting. One of the operators tried to call Ralph, but was unable to reach him. I decided to wait a few minutes because there were still about 40 minutes until the night team would begin to arrive and the evening team would go off duty.
I chatted casually with the team, who by now were all in the break room. A few of the night team operators began to dwindle in and there was still no sign of Ralph. I said that I thought it would be better to reschedule the meeting when Ralph could be present, rather than going on without him. I said my goodbyes and drove home in full zombie state. When I got home, I was barely able to muster up enough energy to send an email to Ralph requesting a new date for the evening and night team meetings.

Inconsistencies: Already?

I knew I was past tired as I glanced through my notes that night but I couldn’t shake the feeling of confusion I’d started to get earlier that morning. The processing teams were supposedly “highly developed”, but had to be reminded that scheduling a meeting was “the kind of thing teams do”? There had been almost no reaction from any of the team members, but Ralph told me that they were excited about participating? Wally’s teams looked like they’d been “self-facilitating” their own goal setting, but didn’t seem like they even knew what a goal was. Jan and maybe Ralph were worried enough about Milo’s role in the project that they took a big risk in talking to me about him when they’d only just met me. There is a “knowledge center team” in the plant that no one ever mentioned. I would think the existence of this kind of group would have been emphasized by top management, giving the type of research I do. Ralph scheduled and even confirmed meetings and then never showed up or sent a message. Things just weren’t adding up right. I sure hoped my state of confusion didn’t last too long. I wasn’t seeing how I would be getting any “research” out of this so far.

The Knowledge Center
I decided to swing by the processing plant to talk to Ralph on my way to the meeting with the “knowledge center team” at the Adult Education Center. He looked pleased to see me, but was surprised that I had chosen not to “go ahead and have the meeting” without him. Even though I thought he had understood that since the team leader would be acting as “coach” during the CISAT and team activities, I explained again how important it was for him to participate. He said, “Oh, ok. I must not have understood: I thought you would be working with the teams yourself. Let’s schedule some new dates for tonight and I will be there.” I thanked him and went on down to the course center.

When I arrived, I recognized four of the 14 women in the group from the introductory meetings the day before. I was told that the other members came from other departments, including the one that that worked in the same area as the packaging department. They explained that the group had been in existence for two years for the purpose of “learning and sharing knowledge within the production facility”. To help them do this, they attended six weeks of training and development each year, including the four weeks at the course center where they were presently enrolled.

Tanya, the operator that had called me the day before, said that after hearing about my research and background, they believed that I might be able to help them with some difficult problems they were experiencing. So someone had been listening!

She explained that “while we are here and working on our plans and projects, everything looks great. But after a few months, we’ve pretty much forgotten about all of those plans and nothing has happened. We need help in learning to not forget things.”

I said that I would be happy to help them, but first I would want to find out some more about what they did as a group—what types of things they learned, how they learned them, and how the company used these things.

Anette, one of the operators that had been with the group since its start, pushed a large binder over to me that contained material on a number of projects. She had pasted little flower stickers all around the words “KC Team Project Work” and I could see she was very proud to be showing it off. They called themselves the “KC’ers” (“Knowledge Center’ers”).

The first project in the book consisted of a problem definition, written as “long waits and communication problems with mechanics with machine break downs” on the top of the first sheet, and a design for color coded magnetic tags that could be attached to idle machines to indicate to the machinists that repairs were needed. Small “prototypes” of the signs were attached in a folder.

Anette told me that the project was completed the previous year and implemented shortly thereafter. The problem was, she said, that “No one used the signs, even though they were within close reach to most of the machines”. After several more questions, I understood that the “KC’ers” had shown the signs to their respective team leaders, who they expected would take responsibility for presenting them to the teams.
When the team leaders failed to mention the signs to the operators’ teams, some of the KC’ers approached them and asked why. The team leaders told them that they should introduce the project to their colleagues themselves. The problem was that none of them felt comfortable enough to “hold a lecture” for the other team members. Some of them simply returned the signs to the team leader or the project folder. Others set the signs up on the machine without explaining to their teammates how they were to be used. In any case, the signs were never put into use and the problem with communicating breakdowns to the maintenance department remained.

A second project in the booklet I was shown involved production planning and scheduling for a particular product series. The problem in this case was defined as “poor planning leads to either rush jobs or slack time”. The group members explained that there seemed to either be too much to do with too little time, so that sometimes everyone was stressed and the “team leader lashes out orders for everyone to get a move on” or else the operators “stood around trying to look busy”.

On the page, I saw notes they had made about calling a meeting with the team leader and someone from the planning department to get information as to why the workload could not be made more steady. I then asked if the meeting had taken place and was told that it had, but that no one really understood much of what was said.

One of the operators said, “They came here with a bunch of overheads and reports and all of their big fancy words about how scheduling is a complicated process and that no one would expect us to understand”.

When I asked if they had questioned the team leader or the scheduler if difficult concepts could be explained, I was told that “Everyone was too scared to ask anything” and that they “felt too dumb to ask what things meant”. After the meeting, they felt that the team leader had wanted them to feel that this kind of problem solving was better left to management. The project had consequently been dropped.

The group had several other projects at various stages of completion. At least two of the projects were more than two years old. Because the one concerning the machine repairs was simple and ready to put into practice, I suggested that we use that project to look at the problems they had mentioned earlier. I explained that I thought this project was also a good one to tackle first because it looked like they could manage its implementation within the group itself.

Even though the project was basically ready to be put into action, I decided to go through some steps on problem solving to support future activities. I asked them how they had identified the problem and was told that “Machine breakdowns have always been a problem. Sometimes a machine cannot be run for several shifts, even if the problem is minor. The operators are not allowed to work on the machines at all. SOP is to fill out a form and put it in the mechanics’ box, but the mechanics might not empty the box or the form might sit on one of their desks for hours. We thought that if we could make it obvious from the workshop [which is located adjacent to the packaging area, with large
glass windows that make most of the machines visible] that a machine is down, it might get faster attention.”

The group members agreed that because this was a recognized problem in the entire production facility, they had not thought to ask operators outside of the group whether the project was a good idea or for suggestions about how to solve the problem.

I said, “I think you are all right that this is a good project for a real problem. Still, it can be a good idea to ask for input from the other operators so they feel included. If they feel like they helped decide on the project and participated in finding a solution, it will be easier to get them involved in its implementation.”

Anette said, “I hadn’t ever thought about that. It’s our job to identify the problems and work up the project. But no one ever asks what we are doing. I guess they would do that if we had talked to them in the beginning.”

Tanya asked, “Would it be a good idea for us to scrap this project then and start fresh with another one and do it right this time?” I assured her that they had not done anything “wrong”, but that part of learning is reflecting over what has been done in the past and finding out how that might be improved next time.

I asked the group whether they felt that there was any direct opposition to the solution they had come up with or whether the problem came from either lack of interest or understanding of the other operators.

Mette, one of the younger operators I recognized from Wally’s group the day before, said, “I don’t think Wally ever wanted us to use the signs or to try to do anything about this problem. It’s like he enjoys fighting it out with the mechanics—you know, going over there like he’s fighting our battles for us and getting really pissed at them for not doing their jobs.”

I interrupted, “But he approved the project in the beginning, right?” The women all looked at each other and answered that he had. So I said, “I don’t really know Wally, but I think if he approved the project, I’d want to assume that he would like to see the problem solved. Maybe there’s something else going on between him and the mechanics that doesn’t have anything to do with this project. We probably won’t ever know. But if it were me, I’d rather give him the benefit of the doubt than give up on the project.”

I then asked the group to suggest what the next step in the implementation process might be. Several ideas were mentioned, including holding a meeting for all of the operators and explaining how the signs were to be used, sending an email to all of the coordinators, asking that they take responsibility for further implementation, or posting some instructions for use of the signs on the team bulletin boards.

I then asked the group to work up a list of pros and cons for each of these proposed plans. I sat back and listened while one after another of the suggestions was discarded as “impossible”.
After lengthy discussion, the group explained that all of the proposed plans would present a problem in one way or the other and so it would be hard to judge which might work in practice. One of the biggest problems for the group seemed to be the idea of presenting something to the other operators.

Anette said that even if it were her own team, she’d be scared to stand up in front of a meeting and act like she was telling them how to do their job. They feared that the coordinators would have the same problem of not wanting to pass along the instructions to the teams, even if the instructions could be explained clearly enough in an email. They added that the third suggestion wouldn’t work because there were so few people that actually read or paid attention to anything posted on the department bulletin boards.

When they were finished talking I said, “Well, I can certainly see a problem, but I’m not sure we can solve it by getting the sign project up and running.” Tanya was quick to say, “See, I wondered if this project wasn’t too hard for us to start with and if we shouldn’t find something easier.”

I walked up to the whiteboard while saying, “Tanya, I think this project is really good, but I think we need to take a few steps back first. Someone tell me again what the purpose for this group is.” I wrote the words Anette repeated verbatim earlier in the meeting: “learning and sharing knowledge within the production facility”. Apparently she had memorized it word for word. Now was time to find out if anyone understood what the words meant.

I said, “Good. I mentioned one important part of learning already—to reflect over what has been doing and what is being done so that we can try to improve in the future. But what about this second part, ‘sharing knowledge’ in the plant? How might that happen?”

The operators were quiet for at least a minute or two while I stood at the board. Tanya replied with a question in her voice, “By telling others what we learn?” Anette followed this up by asking timidly, “Wouldn’t we be sharing knowledge if they started using our projects?”

I summed up their questions by saying that it would be possible to see that knowledge sharing had occurred if the projects were being used by others and that that one way of sharing the knowledge would be by telling them others about the project. Is anyone beginning to see the problem here?”

I walked back to my seat as they considered my question.

Tanya was the first to reply, “Is it that we aren’t telling them?” I smiled at her and said, “Yeah, I think that’s a problem. No matter how good your project is and how many problems you solve in here, if you don’t feel like you can pass this knowledge onto the rest of the plant, your projects will fail. And that’s a shame when you are all working so hard and coming up with such good project plans.”
One of the operators that hadn’t spoken much yet said, “It’s just not that easy for us. You are used to talking in front of people all the time but we are just machine operators. I’d probably spend all day in the bathroom if I knew I had to present something.” I looked around the group and I gathered that many of the others felt the same way.

I said, “You may not believe me, but I still get nervous before I have to present something. Sometimes I need to make a few trips to the bathroom, too! And there are times that I can just hear the shaking in my voice while I’m talking. But I have realized that I’m not going to die from nervousness and I’ve even asked my co-workers before whether they could here me shaking. They said they couldn’t and that I seemed relaxed the whole time. The reason I can get myself up to talk is because I’ve practiced a lot. It gets easier every time, I promise. Besides, some of your teams are smaller than this group here and it looks like most of you are ok with saying what’s on your minds. So you’re half-way there already!”

They smiled a little but I was sure they hadn’t bought in to the point that they would volunteer to present the project in the plant.

“I have a thought. You have three weeks left here at the Adult Education Center. Would it be possible to ask someone to come in and help you all learn how to make a presentation?” The operators agreed that it was worth asking the course leaders if such a workshop could be arranged.

I suggested that in the meantime the group might try some mini-rehearsals of presentations for each other and that we might look at some alternative ways of sharing the project solutions with their co-workers. I then said, “I want to add though, that even when you are able to present projects to your teams, that won’t guarantee that the solutions will be put into use or that things won’t go back to where they were before. The point that I wanted to make is that communicating your projects is a first step. We’ll want to look at other steps in the implementation too.”

Anette sighed deeply and said, “This isn’t so easy, is it?” I laughed and said, “It probably seems a lot harder than it is. It will most likely get easier after you’ve tried it a few times. But these are projects you all have worked hard on. Won’t it be worth a little more work to see that work payoff?”

They agreed that it would be nice to see some of their projects put into use, so we scheduled another meeting for the following week to work through some steps of project implementation. They promised to follow up on scheduling a presentation workshop with the course center.
What a Shame

Here was a group of women that had volunteered to participate in an improvement team and had actually been able to come up with what looked like some good ideas. I imaged that six weeks of external training for so many operators was costing the company quite a bit, too. But so far nothing had come out of the group. Why hadn’t anybody in the company demanded something in return for all the time the KC’ers were at the training center? Why hadn’t anyone asked why the projects weren’t getting implemented? Seemed like a pretty big waste of time, money, and clearly motivated employees.

No Shows

There were only a few hours left until the evening and night team meetings in the processing department. It never even crossed my mind that Ralph wouldn’t show again after we’d scheduled the meetings earlier that morning and confirmed them just a few hours before. If it had, I would have gone directly to the department and tried to catch him before he left for the night.

Instead I decided to return to my desk to finish transcribing notes. It’s amazing how many notes I could take from just one day of meetings. It occurred to me that transcribing is a little like doing the laundry: if I got behind just one day, I might never catch up again!
I drove down to the processing department about an hour before the first meeting was to start and spent some time walking around on the shop floor so I could start learning a little more about what the operators do.

Now that they had met me the night before, the operators smiled and waved when I walked into the plant. They seemed more than willing to talk about the different tasks involved in processing the raw materials into the base product which is used in the main production facility. I still couldn’t get over how little activity there was on the floor. Two of the five evening team members were standing by their machines while the other three were in the break room.

I wondered why they timed their breaks so close to the end of their shifts. Peter explained to me that because the production process is so highly automated, the operator is occupied with an order for only about 30 minutes total out of a two-three hour running cycle. This time is divided between entering the product codes into the computer from the daily production schedules, pouring the raw materials into the large vats, and removing the finished bases from the vats at the cycle completion. The remaining time on a shift is used to retrieve raw materials from the stock room and to keep the machines and work areas clean. No wonder the plant was so clean! Any time left over was spent in the break room and when it was close to the end of a shift, the operators were less likely to look for other small tasks to do. Instead, they would gather in the break room.

Only three of the six machines were running at this point, so I asked if some machines required more than one operator. Peter said, “Sometimes we do on-the-job training, so there might be two men at a machine, but otherwise running a cycle is a one man job. They [management] don’t like the idea of on-the-job training though. If we don’t have as many orders, the other operators help out by running the supplies out to the machines. Ralph has been training one operator per shift to take over some of the paperwork, so that puts us one man short.”

On the way to the break room, I stopped and talked a little with an operator named Gus. He was more than happy to show me “his” machine, which he admitted he hated sharing with other operators. Just behind his work area there is a large whiteboard with productivity figures for the day, week, and month printed in marker.

I asked Gus what the figures stood for and he explained that the most important numbers for the department were “tons per man”. He pointed out the goal, the current numbers and a running total for the week and month. The final number shown was the “percentage above/below” that represented how close actual productivity was to meeting the goals. Under at least three dates, someone had written “Good Work!” I looked up at the clock and said that it was about time to head to the break room for the meeting.

I glanced across the plant and could see Ralph’s office lights had not been turned on since I’d arrived. The three operators that had been in the break room were still there and I greeted them as I walked in. I remembered Paul had been sitting in the same place when I’d arrived the night before. I wondered how often during a shift he wasn’t in that chair. I once again asked him if he knew whether Ralph planned on returning to the plant.
He shrugged and picked up his mobile phone to call. This time Ralph’s answering machine was turned on and Paul left a message. I hoped this meant that he was in route. About 20 awkward minutes after the meeting was to start, I decided to postpone again to the following week.

I waited around until the night team came and since Ralph still hadn’t shown up, I cancelled that meeting, too. I scribbled out a yellow post-it asking him to call me regarding the weekend meeting and attached it to his computer screen before I left for the night.

The same scenario was played out during the next two weekends. Marie, the weekend team coordinator, insisted that their team was so self-directed that it was not necessary to involve Ralph, but I really wanted the team leaders to be involved. I was still optimistic he’d start attending the meetings soon.

What a Start!

I debated postponing the “official start” of the CISAT in both departments until all of the introductory meetings had been held, but decided it would be better to go ahead as planned. I would just have to play catch up with the three remaining teams in the processing department later. I’d planned to meet Wally at the Adult Education Center again for the meetings with all three of his teams, so I prepared overheads of the CISAT instructions and the first list of items to be discussed.

When I met Wally outside the first training room, he told me that it had been a somewhat unpleasant day for the teams. He went on to explain to me that he’d just given notice to an operator that had been with the company for more than 20 years and everyone was taking the news pretty hard.

I asked what the reason was for her dismissal, and he said, “Her work is ok for the most part and she’s well liked by everyone, which is what makes it so hard, but she’s just not a team player.” I wasn’t sure I understood what he meant by this and I hoped it had been explained more clearly to her and her teammates, but I didn’t think I should press him the details.
When we walked into the training room, I could see immediately that one of the older women had been crying and the feeling in the room was somber. I thought, “Oh great, we’re off to a great start here. I’m sure filling out this questionnaire is just what they feel like doing now.” Wally addressed this issue right off the bat saying, “I know we’re all sad right now, but I think it’s a good idea that we proceed as planned with the CISAT. Life is like that. Even though we it seems hard sometimes, we have to keep going.”

I wondered if that was Wally’s idea of a pep talk and had to remind myself not to stare at him with my mouth hanging open when he asked me to hand out the copies of the questionnaire. After everyone had looked the paper over a little, he began reading the instructions for answering the items. I felt like a heel for trying to ignore the sniffling sounds that weren’t totally drowned out by Wally’s voice.

Wally proceeded to explain that there are four response options for each item, representing the degree to which each person agrees that the statement provided describes his/her own experiences in the work place. The first box represents “90-100% (full agreement)”, the second “50-90% (partial agreement)”, the third “10-40% (partial disagreement)”, and the last, “0-10% (full disagreement)”.

Linda, the youngest of the operators in the group, seemed particularly confused by the scoring instructions. Wally explained them again very quickly and I could see she still seemed confused, so I told her I thought it might be clearer once we began discussing the actual items.

Wally went on to reading the first set of CI behaviors, which are concerned with how well everyone really understands what the business is all about: what the competition is like, what it takes for the company to survive, what the long term plans for the company’s development are, and what the customer expects.

Wally glanced around the table after he’d read each item aloud to make sure everyone responded. I stopped him after the second or third item and suggested that some of the operators might give some examples to support their responses.

When no one responded, Wally said, “We have quarterly company-wide meetings when the company’s goals and plans are spelled out.” I continued by asking, “Is there anyone that can tell me what some of the company’s goals or plans are?”

Since no one responded, I reminded them that there were no “right or wrong” answers and that they should try to get a picture in their heads of something they had experienced that supported their answers. I used an item that deals with how well the workforce can explain the company’s plans as an example. I said, “Think back to the last time there was a new team member: Do you remember if you or others could explain to them what the company does and why?”

Silence. I continued, “I can understand you’re kind of on the spot now and it might be uncomfortable to speak out, but could one of you tell me what was said at the last quarterly meeting about goals and plans for the company?”
Almost everyone at the table began quickly erasing and changing their responses. This process continued until all seven of the items on the page were completed.

After the meeting, Wally and I talked a few minutes about how the first meeting had gone. I had of course wished there’d be more dialogue but I did feel that the operators had understood the questions for the most part. At least they seemed to understand them once I’d poked and probed and gave them some scenarios to consider. I suggested to Wally that he use his experiences with the operators to encourage them to give examples that supported their answers.

The other team meetings went about like the first, even though some of the KC’ers that knew me were on those teams. They were all friendly enough, especially when Wally wasn’t around, but they didn’t have anything to say about the first items on the CISAT.

Going through the Motions

By the time the first set of items had been completed for all of the teams in the packaging department, I had a fairly strong suspicion that few if any of the operators had ever given any thought to concepts such as competition, company goals and development, or customer requirements. Wally talked about meetings that all of the operators must have attended, but it didn’t seem like they’d got much from them. I realized it was possible that they were simply too inhibited to share what they knew with me, but I sure didn’t see any light bulbs going off as the items were read out loud. I made a note to see how many “high scores” there were and try to get a bit more information from the operators one-on-one when they returned to the shop floor the following week. Something told me that they had learned to deal with Wally’s own style of management by just riding the tide. I wanted something more from them.
It’s all about Money

Ralph was in a meeting when I met up with the day team in the processing department to work on the first set of CISAT items. He’d left a message that he’d get there “as soon as possible”, but after waiting about 10 minutes I decided to go ahead and start without him. I was a little encouraged that he’d at least acknowledged the meeting by leaving a message for me.

The operators were a good bit more talkative at this meeting than they had been at the introductory meeting. I wasn’t sure if that was due to Ralph’s absence or their having warmed up to the idea of my coming around so often. I’d already spent a few hours out on the floor with them, just as I had with the evening and night teams, and there hadn’t been anyone unwilling to explain what they did and why.

Sometimes I think I have a distinct advantage in being a woman in an almost all male environment like the processing department. The guys just seem to assume I don’t know anything about machines so they tend to be very patient describing every tiny detail. I’ve never felt the need to mention to them how much I’ve worked with team in production and how I’d learned to drive a forklift, run circuits for electrical panels, and do dye changes.

I started the meeting by asking a volunteer to read off the scoring instructions and another to read the description of the first set of CI behaviors we’d be discussing. This would have been Ralph’s job, had he been there. I was relieved that there were volunteers to take over and tried not to think about Ralph more.

I was given quite a speech by one of the operators when I asked for an example of the company’s business goals and plans.

He said passionately, “I don’t care what anybody tells you, the only goal is to make money. They can talk about all sorts of other things like employee satisfaction and personal development, but the bottom line is money.”

I said, “I guess when you get right down to it, that’s the bottom line for any company or else they couldn’t survive. If there’s not enough money to run the company, then employee satisfaction and development is really not an issue. But I think what these questions are asking about is whether you understand how the company expects to reach its goals—what are the plans for reaching goals? Maybe they think if everyone is happy, they’ll make more money. I don’t know. Who has an idea?”
Another operator said, “The most important thing is to produce cheap.” I wanted to see if I couldn’t drag them away from this one response, so I asked, “Is that all that’s important? What about getting the product to the customer on time? What about the quality of the product? Are those things also important?”

They appeared to think a little about my questions, but still came back with the response that none of those other things really mattered as much as “producing cheap”.

We moved on to an item that deals with how well the individual employees understand how their own work fits into the company’s goals and plans. Since they were adamant that price was the only important goal, I suggested they give examples of how they could contribute to keeping costs down.

The same operator that had emphasized price so much said, “It’s not even about cutting costs, it’s about producing tons. If we produce X number of tons per man, they stay off our back.” I said, “Okay. So what can each of you do to make sure you produce so many tons?” The answer surprised me a bit.

He said, “We just have to show up to run the machines. When we have men out sick or in training, we can’t make the quotas without busting our butts. If we are all here, we can do it.” Just to make sure I understood, I repeated, “So the only thing that you feel can influence whether you meet your goals or not is how many of you are on shift?”

They nodded agreement almost in unison. I figured if that were the case, then I could understand why I hadn’t seen any on-time delivery or quality charts up on the bulletin board with the productivity figures.

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**Ready or Not...Here We Go**

For two weeks I’d been driving out to the plant for meetings that ended up being cancelled when Ralph didn’t show. I had finally decided to go ahead and conduct the evening, night, and weekend meetings without him because I was getting worried about running too far behind on the project plan. I went through the same introduction as I had with all of the other teams and then opened the floor for questions.
One of the evening team members named Henrik was curious as to why we would spend two months of short meetings to fill out a questionnaire, instead of just handing it out or holding a half-day workshop as I had with the team leaders. I told him that even though the CISAT had been used in many companies, it hadn’t been used just with shop floor teams yet. So part of the reason was that I wanted to follow the process the teams went through as they were filling out the questionnaire. I also said that I believed that it was important to not only answer the questionnaire, but also to discuss how certain issues were understood by the team members so that the whole process would be a learning experience.

He replied, “Well that makes sense I guess, but every other time we’ve filled these things out, we’ve just done them individually during our lunch breaks.” I asked if he felt like the team got anything out of filling out questionnaires that way. He replied, “No, but I never thought it mattered if we got something out of it.” He went on to tell me that his team had participated in at least 30 projects that he could remember in his 15 years in the plant. He couldn’t recall what most of them were about though.

I laughed and said, “I only get something out of it if you get something out of it, so why don’t we try it this way. If it seems like it’s going too slow, we can pick up the pace after a few weeks. We’re going to need to go a little faster anyway, to catch up with the other teams”. They agreed to give my way a try and then talked together a few minutes to decide on a time for the next week’s meeting.

The night team soon started coming in and I stood to the side while they said their hellos and goodbyes. They seemed friendly enough with each other, but they didn’t go through any type of shift reporting process as far as I could tell.

The Guinea Pigs

The processing teams seemed to accept the fact that they were so often “selected” to participate in different types of research. Unfortunately for them, it sounded like they’d also accepted that they weren’t supposed to be on the receiving end. I thought back to all those studies of guinea pigs used in behavioral psychology classes. The guinea pigs wouldn’t continue to run a maze if there wasn’t a treat at the end. If the teams didn’t get anything out of participating in the research itself, where was their motivation to participate?
There was only one woman on the four member night team in the processing department. A mechanic introduced himself as being part of the team, but he only ended up attending a few the CISAT meetings. Because the operators all started their shift in the break room, we were able to start the introductory meeting right away. Again, I asked for a volunteer to read the scoring instruction as well as the first set of behaviors and another to read the individual items.

It seemed to me like they were all in a hurry to complete the page and didn’t want to discuss the items in much detail. Basically they believed that most of the operators were aware of the business goals and plans and could explain them to new employees, but no one offered to share their understanding with me at this point.

When they had finished the page, the mechanic asked what would happen with the results once the project was completed. I told him that we would use the CISAT results to develop some improvement activities. He said, “How do you know anyone will use any of this research for anything?” I knew he hadn’t had time to talk to Henrik between the meetings, so I had to assume that at least two operators in the plant might be getting tired of running the maze without rewards.

I answered that the plan to work on improvement activities had been approved by top management, if that was his concern. He replied, “I just know that we have lots of people come out here and do research or surveys or projects, whatever you want to call them, and nothing ever comes out of it. There’s a pile of papers from all of those studies down in the basement big enough to start a bonfire that could be seen half-way across the country.”

I asked him what he would like to see happen with the results and he shrugged saying, “I’d just like to get something out of this that we can use for something.” I assured him that I also wanted the results to be useable and that I thought it would be a good idea for us to evaluate what we were doing from time to time to make sure this was the case. He sighed heavily and said, “We’ll see”. I felt like I’d already let him down and I hadn’t really gotten started yet.

**Expectations**

Maybe the mechanic had asked the other researchers the same question and got the same answer. Maybe the other researchers had even believed they would “deliver” at the end and something got in their way. I didn’t have any idea what the other projects were and
nobody else seemed to know. What I did know was that I’d never be able to get through the next few months in the company if I didn’t believe my project would be of use to someone.

Weekend Nursery School

Just a few days later, I made my third weekend trip out to the plant. I wasn’t surprised anymore that Ralph wasn’t there. It took a few minutes to round up the four team members. I guess they were so used to me showing up and then canceling the meeting that they didn’t see a reason to rush.

Following the same procedure I had with the other teams in the processing department, I asked for a volunteer to read the instructions. Marie quickly offered but read so fast that I had to ask her to slow down over and over again because two male operators’ had permanent confused looks on their faces.

While I was asking them if they understood the different response choices, Marie and Julia were well on their way to answering the first set of questions. I asked if they wouldn’t wait until we could discuss the items. In response, Marie flung her pencil down on the table, pushed her chair back, and folded her arms across her chest as if she expected a long wait. Julia picked up a magazine from the table and started thumbing through it. When I asked for a volunteer to read the questions, no one responded. I sat down and waited.

After three-four minutes of silence, Marie said, “We’re not in nursery school; we can read the questions ourselves.” Funny she mentioned nursery school because it looked a lot to me like she was throwing a two-year-old temper tantrum. Luckily I have some experience with two year old temper tantrums and learned a long time ago that it’s best to ignore them.

I didn’t feel that bringing up the discussion of possible reading problems among the operators was appropriate. Instead, I agreed that everyone could read the questions to themselves, but that they should wait until we have discussed them before responding. I knew there was still a chance that one of the operators didn’t read well enough to answer correctly, but I hoped be able to make up for that happening with the discussions.

Marie had already answered all but one of the seven items and promptly marked her response to the last one before the men had begun to read the first. Julie continued
reading her magazine. I tried quite hard to hide my frustration, thinking that we were really getting off to a bad start here. I decided to go ahead and ask for examples of behaviors that supported the responses, but no one replied.

Finally, I took a deep breath and said, “Would your team rather not participate in the research? There’s no reason for us to waste each other’s time if you’re not interested.” Marie jumped to respond as if she’d been waiting for the opportunity to tell me “We have our own way of doing things on the weekend shift. We’ll participate but we want to do it our way.” The guys looked a little embarrassed and Julie still hadn’t looked up from her magazine.

I surely didn’t want to get in a power struggle with Marie, so I said, “I know that it might not make sense to do the questionnaire this way, but there are reasons for it. For one, it’s important that all of the teams follow as close to the same procedure as possible. The other, which is really the most important, is that just filling out the form without talking about what these things mean in your own work won’t help anyone learn. What is read will be forgotten by the time I leave here.”

No one responded, so I collected the sheets from the tables and said, “Why don’t you all discuss whether you want to participate or not and let me know. I’m not going to force anyone to do anything.” I started packing up my supplies and was on my way to the door when Julie said, “I think if the other teams are doing it your way, we should too. Can we change the meeting time from now on?” I told her that would be fine, so we arranged a date that all agreed on and I left. Marie had a very displeased look on her face. I was careful not to gloat. I figured some of us should try to act like an adult.

Marie had told me at least twice now that the weekend team was “self-directed” and therefore didn’t need Ralph to participate and that they shouldn’t have someone else (me) telling them how to do something. I had to assume that they could manage well enough without a team leader, since I’d been there four times now without seeing Ralph. But I didn’t understand why it seemed so important to her to prove to me that they do things their own way. It was almost like she saw me as some kind of threat to her and the power she’d clearly built for herself in the team. I decided I’d try to talk to her alone some at the
next meeting. There was always the possibility that she felt threatened by someone else and chose attacking me as her defense.

Opposites

The second full week of conducting the CISAT with the teams in both of the departments ran fairly smoothly. Wally controlled most of the discussions with his team and there were few comments and little discussion among the operators themselves. Linda seemed really confused with questions about customers, since “we don’t have things people can just buy.” She then apologized because she “doesn’t know much.” I explained the idea of “internal” and “external” customers to the team. I asked them to try to give me some examples of each type and they guessed a bit. Eventually an operator picked up on my having already given two examples and used them herself. We all congratulated her for the smart thinking before going on to the next items.

Ralph had not attended any of the meetings in the processing department and I wasn’t quite sure what to do about that situation. There had been a rather amusing debate with one of the operators from the evening team who claimed “all this talk of improvement is just designed to give us low self-confidence. If we’re already the best at what we do, what is there to improve?” he asked rhetorically. Otherwise the teams responded only when prompted.

I could see that the teams in the processing department were more “mature” than those in packaging, in terms of acting like a team, but they still did not see CI as a part of their regular work processes.

Most problem solving and implementing of improvements were accomplished by small task groups coordinated and run by the second team leader. Because of his engineering background, these improvements were primarily aimed at technical improvements. The improvement groups were mostly comprised of operators from the day team because most meetings were held during their shift. Sometimes evening and night team operators also attended, but they didn’t receive pay for their time. I didn’t have any trouble understanding that it could be a problem to volunteer to attend a meeting at noon and then work 11-7 that night.
Idling

I called Harry, my research advisor, to talk about Ralph’s consistent absence at the team meetings. He told me that there are two ways of looking at the problem. I could either find a way to “force” Ralph to attend the meetings or I could just go ahead and describe what was happening with the teams as they conducted the CISAT without him. He reminded me that as a researcher, I didn’t necessarily have to act on what I observed or experienced. Of course, I wanted Ralph to attend because that was part of my project plan, but did I have the right to force him to comply with my wishes? We talked it through some and decided that I should at least let the top management team know about the problem. They could then decide whether they would press the issue with Ralph or not. There was another top management meeting soon and since it would be hard for me not to mention Ralph when the managers were expecting a status report on the project, this plan seemed best.

Coming up to Speed

About a month had gone by since the last top management team. By this time, the new director of production, Anders, had been in office for a few weeks and I’d conducted the first workshop with the team leader group as well as two CISAT meetings with all of the shop floor teams. This meant that there was a good bit of progress reporting to be done on my part, which would help Anders get up to speed on what was going on.

Frank, Harry, and I were all at the meeting, along with six of the top managers, Milo, and Anders. This was the first time my advisors and I had met Anders, although I’d seen him around a few times. His appearance and manner couldn’t be more opposite than Per’s. While Per literally filled a room with his presence, Anders seemed very quiet and reserved.
I took the lead and described how the team leader self-assessment had gone. I couldn’t help but look at Milo when I said that the team leaders had not realized the workshops would continue over a few months. He’d been the one in charge of filling them in on the plans we’d made in the last top management group.

He said, “Well, they knew you’d be scheduling meetings twice a month or so because I sent them all an email.” I went on to say that from the first workshop, I did not get the sense that the team leaders felt as if they were a team and that some team development would likely be recommended at some point. There were a number of “red zones” on the team leaders’ CISAT results and these would be investigated more thoroughly in the upcoming weeks.

I then moved on to the shop floor teams. I mentioned that I had been surprised that no regular team meetings were held in the plant, so rather than integrating the CISAT into weekly meetings, I had needed to schedule them for the project.

Again it was Milo that answered, “We used to have regular team meetings but we’ve adopted a ‘meet as necessary policy’ now. We discovered that there were times when there wasn’t anything to discuss, so many of the meetings were a waste of time.”

Harry asked about improvement meetings and how these were fit into the daily and weekly schedules. The top manager who had recently been given responsibility for the packaging department said, “The team leader works with the teams on improvements when they come together for other reasons. On top of that, there is a coordinator for each team that helps with assigning operators to the machines each week and the coordinators meet with the team leaders to talk about problems they are having.”

I proceeded to say that I’d had some problems with Ralph not showing up for the meetings in the process department, which could be because he is not used to attending team meetings. Anders asked if I’d talked to Ralph and explained that he should be at the meetings.

I answered that I felt this point was clear, since the other team leaders had understood and that I had personally scheduled the meetings with Ralph in the first place. I added that I had also explained that as the team leader, he would have the role of co-facilitating the actual CISAT process. The top manager who had responsibility for the process department said that he’d have a word with Ralph and make sure he attended the meetings from there on out.

I reported that there hadn’t been any problems with scheduling the meetings with Wally and the packaging department teams. In fact, he had scheduled all of the meetings for the next four months, reserved a meeting room for each, and posted the schedule on the teams’ message board.

Anders asked how the Wally was doing with the meetings and I said, “Fine, so far. It’s clear that he is in control and the teams themselves don’t participate very much, but hopefully they will begin to more as they become more comfortable with the process.”
“Fine” is of course a relative term. I wasn’t thrilled with the way Wally handled his teams or the CISAT meetings, but I didn’t want to start complaining about things that might change after we were farther into the process.

Since there was really no need to involve the entire top management team in further meetings, we discussed the idea of a steering committee again. It was decided that Frank, Harry, and I, plus Anders, Milo, and the new director of human resources would participate. These three would then update the top management team periodically.

**On the Side Lines**

Immediately after the meeting, Milo took me to the side and said that I’d done a great job presenting to the top management. He said, “They heard what you were saying, even if they didn’t show it.” He went on to say that I’d probably got them thinking about the processing department because even though they were the plant’s “top performers”, there were some that questioned whether there might be problems under the surface that no one was aware of yet. I thought his way of summarizing what had just happened, as I hadn’t been there, was interesting. I simply thanked him for the feedback.

**Talking Outside Meetings**

The next morning, I received an email from Milo stating that he’d talked briefly with Wally, Ralph, and Jan about what had been said during the top management meeting the day before. Even though I was certain that I had not said anything in the meeting that I
hadn’t or wouldn’t have said directly to the team leaders, I was definitely afraid of how my words would sound coming from Milo. It didn’t help matters that Jan had strongly alluded to his not wanting me to talk about the processing team to Milo.

Still, since Milo was the project manager, there wasn’t much I could legitimately complain about it. I chose not to do anything for the time being. The next team leader workshop was scheduled later in the day and I felt sure I’d find out if in fact whether “damage repair” would be necessary.

As it turned out, Wally was the only one of the three Milo had talked to that came to the team leader workshop. Sonya and Charles were also there, so we sat and chatted a little while we waited for the others to show up. Wally wasn’t very talkative, but he hadn’t really said much in the first workshop, so it was hard to tell if that meant anything. Charles tried to call the others but they all seemed to be tied up in meetings or in the middle of some crisis in the plant. Charles offered to set a date for a new meeting and said he’d make sure all of the team leaders sent a reply to confirm they’d be attending.

I had intended to go out in the packaging department and start talking with some of the operators now that they were back on the floor, but I just couldn’t muster up enough energy to do it. I decided to call it a day and return home to transcribe my notes. I had the second weekend team meeting early the next morning and I thought it might be a good thing for me to have a little break from the plant before then.

I arrived back at the plant about a half-hour before the weekend team meeting was scheduled so I could see the operators “in action”. Julie was the first I saw, so I went over and asked how things were going. “Busy!” she said.

I’d remembered the evening team telling me they were having a slow week, so I asked what was up. She said, “Everything we sent out last night had to be dumped. We have to do all the orders again.”
I asked what had happened and she shrugged her shoulders and said, “Some kind of mix up on the orders is all I know. But don’t say anything to Marie about it. She told me to keep quiet.”

I told her I wouldn’t say anything and then moved on to talk to Ole, one of the other operators, at his machine. He was in the middle of some cleaning so the machine wasn’t running. I looked around to see if he had any palettes ready to load, but didn’t see any. I asked if he had any orders to start before the meeting, to which he said no. I then asked if there was a lot on the schedule for the rest of the weekend and again he replied no, they were about caught up.

I glanced back at Julie who looked like she could really use some help: I looked at Ole again, but he apparently hadn’t come to the same conclusion. I still hadn’t seen the other operators or Marie, but according to the clock on the wall it was about time for the meeting. I went back to Julie’s machine and asked if she thought she could work the meeting in between loads. She said she’d try to get there as soon as she could.

Ole and I went on to the break room where we found the second male operator, Claus, sitting and drinking a cup of coffee. When he saw me, he called Marie on his mobile and then told me she’d be along when she could.

Since there were only two operators, neither of which seemed to be too busy, I decided to stall a few minutes before starting. Ole told me that he’d been at the company for nine years, mostly on the weekend shift. He said he liked that they could basically do what they wanted and aside from some brief contact with the evening teams on Sunday nights, they were pretty much left alone.

Claus was newer to the company, having been there less than one year. Neither of the men seemed especially talkative but I gathered that was more their nature than any problem with the project.

Finally Marie and Julie came in and sat down. Without my asking her, Marie picked up the instructions for the second set of items and began reading them aloud. As soon as a statement was read, she began providing support for the response she would give. She insisted that improvement activities and problem solving occurred according to a general (unwritten) plan, but the only example she was able to give was related to housekeeping.

“We’re always looking for ways to keep the machines clean or to prevent them getting so dirty”, she stated. She also strongly supported statements pertaining to management taking initiatives to ensure that CI occurred in all critical areas of the work processes.

I asked if Ralph supported their CI activities in some way, even though he was not present, and with a raised voice she said, “He is the best team leader in this plant and he stands behind us and what we do 100%”. 
I thought it best to move on to the remaining items rather than ask how this related to my question. I tried several times to engage the other operators in a discussion and finally Marie explained to me that “they don’t talk a lot but they do their job just fine.”

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**Mums the Word**

I’ll admit I am pretty observant. And since observing is a big part of research, I probably notice more than the average person. Still, I couldn’t understand that the two male operators hadn’t realized there’d been such a big production error and that Marie and Julie needed help catching up. Just a week ago, Marie had defended the team almost to the point of suggesting we duke it out. This week she acted as though I’d personally insulted their supreme chief and commander. I sure had the feeling that there was a lot not being said in the processing department and I was a little curious why so many felt the need to keep quiet.

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**Strike Two, Strike Three**

The turnout for the next scheduled team leader workshop was precisely the same as the last. Charles, Sonya, and Wally were the only ones that came. Charles said that he’d received an email from one of the team leaders explaining that he would be attending an external workshop and therefore could not attend. He had not heard from the others.

After 15 minutes of waiting, we once again decided to reschedule. I received a copy of a relatively strong-worded email Charles sent to the group requesting full attendance at the next meeting scheduled a few days later.

When only Sonya and Charles showed up the next time, it was clear to the three of us that our efforts to get the group together weren’t working. I asked both of them if the meeting
simply didn’t interest the team leaders enough to prioritize it. They assured me that not attending scheduled meetings was more the norm than the exception, regardless of the purpose.

Charles told me that during the past six months, attendance at the three weekly production meetings averaged about 20 percent. Quick math let me know that this was about the same as I was experiencing with their group. Sonya said that she knew the excuse that they were too busy had been overused, but that she still believed their hectic schedules explained a large part of the problem.

She then said, “And what is worse is attending all these meetings and doing all this planning without anything changing as a result. We are all just tired.” I could see from her expression that being tired wasn’t just a physical state. I often saw her smiling and looking like she had tons of energy out on the floor, but with her guard down now she looked emotionally and physically exhausted.

I then asked why the two of them had decided to come today, given that they were probably just as tired as their colleagues.

They looked back and forth from each other and to me before Charles answered, “That’s a good question. I knew in my heart they wouldn’t show up today, even though I hoped they would. But it’s like I’ve had this feeling that things have been getting worse and worse, but I can’t quite put my finger on what is wrong. It’s like I’m looking for the missing pieces for it to make sense. I guess seeing that no body gives a damn confirms what I’ve feared.”

Sonya nodded all the time Charles was talking and said, “Maybe it’s not even fair for me to say this, but for some reason I felt a little bit of hope that you could help us find a way to make things better. It’s like Charles said, something has felt wrong for a long time but we haven’t known what to do about it. I guess I had some expectations that we might finally get some help to figure out what to do.”

Not 20 minutes earlier, I’d been ready to throw in the towel with the team leader group. I was already working on my defense to the top management team, thinking I’d say, “I know I agreed to do these workshops, but I can find better things to do with my time than sit and wait on a bunch of managers that couldn’t be bothered.”

I sure don’t see myself as any kind of miracle worker, but after hearing these two open up like they had, I knew I had to at least try to help. The first major obstacle was to get everybody in one place again. Charles offered to speak with Anders about the problem and see if he couldn’t help. Ordinarily I would have preferred not to go running to top management with this type of a problem, but I agreed with Charles that involving Anders might be the only way to get the ball rolling.

Within two days, I had an email from Anders explaining that he’d had a talk with the team leaders and asked that they all make every effort to attend a newly scheduled workshop. He suggested that I contact him immediately if there were any no-shows.
Last hope

One of my strongest personal qualities is that I rarely give up on something. No matter how big the problem, I have this (perhaps naïve) belief that it can be solved. I think that is also one of my weakest personal characteristics, too. There have been times when I would have been much better off had I cut my losses and bailed ship. I wondered if I wouldn’t end up regretting that I hadn’t just “resigned” from the team leader group that day. I knew no one would have blamed me if I had. I could always justify backing out by saying, “Hey, you can’t help people that don’t want to be helped.” The problem with that line was that at least two members of this group did seem to want help enough to show up when they must have known no one else would. I knew it was possible that some of the others might also want help but had just given up any hope of getting any. I reassured myself with the thought that if I just tried one more time and it didn’t work, then I would see I was fighting a losing battle. I’ve used that argument on myself plenty of times before but there always seems to be just that “one more time.”

Now We’re Talking

I had received a message from the secretary that Wally had been sick for a few days and couldn’t attend the workshop Anders has scheduled. I was thrilled when I saw that all of the other team leaders were there, but I have to admit that I was less than happy to see that Milo was also present. I realized feeling that he was crashing a party when he hadn’t
been invited (by me anyway) was a bit immature, but I was also worried how the team leaders would react to his presence.

I wanted to have as much time as possible open for discussion of the CISAT results, so I gave a quick overview of the agenda for the meeting and put the first overhead on the projector. The team leaders all listened attentively while I explained how the color-coded diagram illustrated the stronger and weaker areas of the different groups of CI behaviors. There were a few questions about how one area could be red while another was green, but for the most part they focused on the red zones.

I realize that with any kind of problem solving exercises, the focus is of course on the problems, but it still surprises me a little that no one ever says, “Hey, see all those green fields—boy we are good!”

The three weakest areas shown on the figure were learning, cross-functional coordination, and knowledge sharing. I had printed out some of the individual items from those areas on the questionnaire so we could talk about why they received low scores. With all of the cancelled meetings, it had been a long time since I’d scored the questionnaires so I was really glad I’d done that. I would have had a hard time remembering them otherwise.

Most everyone in the group participated in the discussion and it soon became clear that the team leaders had never developed behaviors related to these weak areas because they’d never functioned as a team. They agreed that individually, they possessed a good deal of knowledge about CI from various workshops and courses they’d attended, but they’d never thought to share this knowledge with the group. The idea of bringing a problem up for group discussion seemed also quite foreign to them, so there was no tradition for learning from others’ experiences in the group.

When the top management team had mentioned problems with the team leader group in one of our meetings, I had suspected that team development would be necessary. This discussion more than confirmed that suspicion.

I still wanted to know if there was more going on—if there were any reasons why the team leaders didn’t discuss things with each other. I have seen situations where shop floor teams and their team leaders get so caught up in their “team identity”, that they become fiercely competitive with each other so there’s no way they would see working cooperatively as an advantage. One sure fire way a company can set up this type of competition is through badly thought out incentive and bonus plans. I didn’t know if there were any of those lurking in the background here. No way to find out without asking!

Ralph told me that the shop floor team incentives were “basically a joke”—that even if there was an award, it was so little that it didn’t mean much to the operators. The incentives were based on departmental performance and didn’t sound like they pitted departments against each other since they weren’t fighting for one pool. Chris looked cautiously around the room, settling his look on Milo for a few seconds, before turning to me.
He then said, “Per talked about a team leader bonus package when we were at the autumn workshop. He made it sound like we could earn a good annual bonus if we agreed to his proposal. Some of us thought it was a good idea, but there were some that wouldn’t sign.”

Charles turned a bit red in the face before saying, “The whole structure of that bonus was wrong. The idea was that it would get us to work together more, but the bottom line was that the team leader got a bonus if his department out-performed the others. How can my department do better than yours if we are sitting and waiting on your people to deliver?”

Chris shrugged and said, “I didn’t say it was fair, but now we have nothing.”

I asked how the bonus would be figured and if there were agreed upon measures like on-time delivery, quality, etc between departments that would put each department on equal footing. Sonya said that she’d understood that the bonus would be calculated only on tons produced per man-hour, so some departments would clearly always be at advantage.

Ralph said, “I don’t think it was ever the idea to get us to work together. It was to get us to push productivity up. That’s all that is important and it doesn’t really matter how it gets there.” I seemed to remember having heard a similar thought coming from Ralph’s teams.

Within just a few minutes, a rather heated discussion ensued. I sat down in my chair when I realized they weren’t fighting among themselves. Instead, they were backing each other up with one example after another of how promises had been made and broken by top management and how betrayed and confused they had felt during the past year or two.

I looked down at Milo who appeared to be jotting down every word in shorthand. I knew that I was going to have to find a way to get rid of him before the next meeting. After the group had bantered back and forth for about 20 minutes, Milo interrupted them by asking me if we shouldn’t get back to what I’d planned for the meeting.

The team leaders were all quiet now and looking directly at me. I thought, “Oh yeah, let’s just act like none of these problems exist and go on with the agenda. I’m sure they are more than used to that!”

Instead I said, “If I were standing in your shoes, I’d have a hard time thinking about CI with all this other stuff just under the surface. I’m going to suggest that we look at some options for dealing with these problems before we get back to the CISAT results. What do you all think?” There were a few surprised looks around the table and maybe a bit of skepticism, but I thought I detected a sense of relief among most of the team leaders.

Charles asked what I had in mind. I answered, “I have no idea. That’s what we will have to figure out together. To be able to do that, I’ll need to talk with Anders and ask how he feels about us changing the plans some. What if I tell him that there are some problems that I feel need to be addressed and that we need some more time to discuss them before getting back to the project plan?”
They agreed and I promised I’d get back to them by phone or email about our next meeting. Before I’d made it back to my desk, Ralph caught up with me and said, “You better hurry and get to Anders if you want to be the first to talk to him.” I didn’t have to be a mind reader to know he was alluding to Milo and the notes he’d taken throughout the meeting. I promised I’d get in touch with Anders as soon as possible.

Anders wasn’t in his office so I sat down and wrote him an email requesting a meeting as soon as possible regarding the team leader group. He called me on my mobile phone while I was driving home a little later. He asked me if there had been problems with any of the team leaders not attending. I assured him that they were all at the meeting, but some things had come up that I thought we should discuss. He offered a time the next day at 7:30 a.m. I guessed he was squeezing me in before a meeting, but that was fine with me. I’d been afraid I’d have to wait a week or two before getting in to see him. He said he’d try to get in touch with Kurt, the new human resource director, to see if he couldn’t be there. Right before hanging up he added, “I’ll send a mail to Milo asking him to come.” I didn’t think sitting on the side of the highway was the right place to bring up a discussion on Milo, so I thanked him for calling and continued home.

Psychotherapy

The fact that I hadn’t gone into clinical psychology doesn’t keep me from borrowing from the field from time to time. I believe heart and soul that whatever type of problems people have, the first step to improving the situation is to get them talking. Ok, well the first step here was to actually get them in one place. But since Anders had taken care of that for me, then the second step was to get some sort of dialogue going in the group. I have to admit I hadn’t expected the team leaders to open up so quickly. I’d also like to say that I have some magical secret for getting people talking that I used with the team leaders. The truth is, they were ready to talk and just needed to know it was ok to do so. It was more than ok as far as I was concerned!
Even though I made it to the plant by 7:10, I noticed Milo had beaten me to Anders’s office. I walked on in and sat down, which I think surprised Milo a bit. He started examining his shoes intensely as Anders told me that Milo had just been filling him in on the meeting the day before. I nodded and smiled, doing my best not to say anything that might give away what I was really thinking. Luckily Kurt, the new human resource director, came in about that time so I didn’t have the chance to embarrass myself or Milo.

I started off by saying that I’d been pleased that all of the team leaders except Wally had attended and participated in the workshop the day before. I also felt confident that the CISAT results reflected the group’s status with CI pretty well, with a few exceptions. I then told them that while we were discussing possible reasons for some of the weaker areas of CI, the workshop had taken a turn so that the focus was more on some problems the team leaders appeared to have with events that had occurred during the past two years.

Milo quickly jumped in to say, “That is always a problem with unstructured workshops; they can turn into gripe sessions very quickly.” I nodded and said that I totally agreed, but didn’t always believe that was a bad thing. I said, “You know, it’s not just women that need to gripe from time to time to get things off their chest so they can go on and do what they need to do. From what I heard in the workshop, they have reason to be pissed off, confused, and frustrated—whatever you want to call it. I realize I haven’t been here very long, but I would bet that standard practice around here is to try to sweep this kind of thing under the rug.” I could see Anders smiling so I figured I hadn’t overstepped my boundaries too badly, at least where he was concerned. So I continued by saying, “And I’m sure you all know what happens when you keep sweeping things under the rug; pretty soon you’ve got an elephant-sized problem that everyone is trying to pretend isn’t there. It’s my opinion that we need to get the elephant out from under the rug if CI or anything else is going to happen with that group.”

Kurt asked if I could fill them in on what types of problems the group talked about. Milo began to speak and I cut him off. I said, “I agreed with the group that none of the details of what was said would be disclosed at this point and there is really no reason to go into all of that now.”

Anders sat quietly a minute and then said, “I knew there were problems. I just didn’t know what they were or what to do with them. I sense that at least some of it is long-
standing, before I took over this position. But that doesn’t matter. Do you have any ideas about what we can do?”

Of course I had some ideas; I always have lots and lots of ideas. I won’t say that they are always good ideas, but in this case I felt pretty sure.

I told him, “I believe the group needs more time to talk about what is and has been bothering them. I strongly advise that the meeting is facilitated because they do not have experience operating as a team yet and there are a lot of emotions involved. I would like to offer to facilitate that meeting, but there might also be someone from your HR department that you would be more comfortable with. The important part is that the group accepts and trusts the facilitator.” I was willing to protest if they suggested Milo for the job.

Kurt asked if I thought the team leaders trusted me enough to discuss the issues openly and I said that I had that impression, but I would want to ask them directly. Anders said, “I’d like you to facilitate the meeting, if that is ok with the team leaders. You need to tell us what we can do to support you and them.”

I liked hearing him say this. I really liked this and I smiled to let him know that. I paused to concentrate on my wording before I said, “Thank you. I appreciate that. There is one thing. We need to give the team leaders the freedom to say whatever is on their minds without worrying that there will be any negative consequences. I want to ensure them total confidentiality. If I facilitate the meeting, I would ask that it be just the team leaders and I in the room.” Milo of course knew this statement was aimed directly at him, but I knew he was too smart to confront me directly on it.

Anders nodded agreement. Milo asked how I thought the problems could be solved if no one else was privy to what went on in the meeting. Anders answered with a question of his own: “Is it possible to come out of the meeting with an action plan that states the problems and some ways we can attack them together?” I agreed that this would be a reasonable way to ensure that the problems were properly addressed.

The meeting lasted less than 30 minutes but I felt like so much had been accomplished. I had a genuine sense that Anders would do whatever he could to support me and to help the team leaders through this situation. I packed up my papers and was ready to leave when he asked me to stay behind a minute. Milo lingered after Kurt left but then seemed to realize he wouldn’t be needed for what Anders wanted to say.

After he was gone, Anders sat back down and said, “I wanted you to know that I’m letting Wally go. I know you like him, but there have been some problems for some time.”

I’m sure Anders could see the surprise on my face. He wasn’t entirely right about my liking Wally. I think what I’d said before was that I hadn’t had any problems with him and that he was highly organized. What I really thought was that he was a pretty lousy team leader. He managed his teams like they consigned military troops. Even though he was
only 34 years old, he reminded me of a typical old shift boss. I just hadn’t ever shared my opinion with anyone since no one had asked. Still, I was surprised because I knew Wally had big career plans in the company. I said, “Would you mind if I asked why?”

He said, “Of course you can and I’m glad to tell you. I just didn’t want to go into it while Milo was here. Wally asked that he have some time to decide what he’s going to do before it becomes common knowledge.” If I hadn’t been so surprised about this news, I might have taken some satisfaction in hearing Anders hint at a possible issue with Milo.

Anders went on to explain that there had been a long series of complaints about Wally during the past year. Apparently it wasn’t uncommon for him to lose his temper and start a yelling tirade. Because he seemed so bright and ambitious, the HR department had arranged for him to meet with a psychologist several times. They set some goals together and worked on some ways that Wally could deal with his frustration better, but the outbursts have continued. Frankly, the operators in his department are scared to death of him. The number of sick days per operator is three times the plant average. I thought there maybe there was some family or personal problems, but he says no. He basically thinks he got the short end of the stick having almost all women in his department. No offense.”

I assured him that no offense was taken. I’d worked enough with all female teams to know that they could be especially trying. The operators in the packaging department were probably the least skilled and least educated in the entire facility, which didn’t make the team leader’s job any easier. But that wasn’t likely to change and I could understand Anders’s dilemma. He needed a team leader that could manage these women teams fairly and effectively.

Anders told me that he’d offered Wally the choice of another position in the plant, but wasn’t surprised when he’d turned it down. Then he said, “He’s been out sick the past few days. I expect he’ll be back by the end of the week.” I had an uneasy feeling hearing this and remembering the story of the last team leader dismissal. I asked who’s idea it was for Wally “to be sick”. Thankfully he said it had been Wally’s idea. I made a mental note to see if that detail came out when the story began to circulate.

Anders said that it was more than likely that at least one other team leader would be fired within the next few months. He said, “I know it may sound sudden, but I have one year to make some major changes. Kurt and I have spent considerable time working up a team leader profile that is compatible with our future strategy. We’ll do all we can to support the ones we believe can fit that profile, but not all of them do. I’m going to be looking closely at Chris during the next few months. Carl is a bit set in his ways and thinks all this team business is for the birds, but he’s close to retirement. That’s as far as we’ve taken the discussion so far.”

I think I’m pretty good at reading people. I believed that this relatively inexperienced new director of production was sincere, committed, and also deeply saddened by the choices he felt he had to make. I couldn’t help but wonder what even more uncertainty and change would do to the team leader group. These were not the ideal conditions to be
starting team development. On the other hand, I really didn’t see how it could be ignored any longer.

Maybe Anders was just as good at reading people as I believe I am. He said, “I know part of the team leader’s problems come from all of the changes going on. So tell me what I say when they ask me about the future, when I don’t even know myself what will happen.”

With all that had happened in the past with this group, I knew the worst would be for him to lie and pretend he had a well-planned out strategy in his back pocket. I wasn’t even sure Anders could pull it off if he wanted to. So I said, “All you can do is be honest. Tell them you don’t know yet. Tell them that you understand they feel insecure and that you will give them answers when you have them. If there are some team leaders that you are sure will be staying, you might consider meeting with them privately to reassure them.”

He sat quietly for a few minutes, deep in thought. Then he said, “Can I really say I don’t know?” I assured him that in my book, it was ok for even top managers to admit to being human.

I promised Anders I’d be in touch once I’d met with the team leader group again. I stopped by the secretary’s desk on the way out to schedule a time for the next workshop. With the help of her snazzy computerized scheduling system she was able to see who was in what meeting at what time for every day during the next month or two. I was relieved we could set a date at the beginning of the new week so that the momentum from the last workshop wouldn’t be lost with a delay. In the meantime, I had gained permission from the team leaders to use a little more time each week with the teams to speed up the process with the CISAT questionnaire, so I was busy enough!

Can I say I don’t know?

Sometimes saying we don’t have all the answers can be hard. After years and years of education, as a mother/father, or as the top manager of a plant, we feel that we ought to have the answers. I truly believed Anders was mostly concerned about creating even more uncertainty in the team leader group by admitting that he didn’t know what would happen. Still, I imagined that it must be hard for someone in his (new) position to admit that. On the other hand, the risks of admitting we don’t have the answers seem small when compared to the risks of acting like we do. If we do that, there’s a good chance we’ll be wrong. And if it’s hard to admit that we don’t have the answers, then it’s doubly
hard to admit we made a mistake. More likely, we’d just act like we’d never made all those promises in the first place. I think it would be a lot easier to trust someone that gave an honest “I don’t know” than someone who seemed to always have the answers. I had a suspicion that this would be a refreshing and welcome change for the team leaders.

Crossed Signals?

One day Ralph approached me before one of the meetings and said he’d just come from a meeting with Thomas, the top manager responsible for his department. He told me he’d been surprised when his boss mentioned that he hadn’t been attending the weekly team meetings. He went on to say that he hadn't attended because he thought the teams would be much more open if he weren’t there. With the most earnest look on his face possible, he said, “I didn’t know you wanted me to be at every meeting.” I had personally explained the importance of his being there more than once and I knew Ralph was more than intelligent enough to understand my explanations. I stood there thinking, “What’s going on here?” Like a broken record, I told him once more that it was important in terms of the teams’ continued learning and CI that he participate in as many meetings as possible. He agreed but never attended another team meeting.

If Ralph were the only one guilty of saying he’d do something and then not following through, I might have just believed it was a character weakness. But this same kind of situation happened a lot. I wondered if a whole company could suffer from weak character. Or maybe they had just been really good at learning the wrong things. It was hard for me to fault Ralph for failing to attend the meetings when his own boss contributed to the problem several times. Thomas now had a schedule of all the meetings with the individual teams in the processing department, but he seemed to overlook the schedule when he planned meetings with Ralph and Jan.

I often saw the three of them sitting in the meeting rooms as I was on my way to a shop floor meeting. I made a habit of waving to them through the glass windows. As foolish as it might sound, I wanted them to know there was a meeting taking place and they were missing it.

There were other similar situations that caused me to almost literally scratch my head in confusion. Once Jan sent a memo around to the teams letting them know that an adjustment needed to be made to one of the product lines. I saw the memos posted by
every machine but I was apparently one of the few that did. The product was run incorrectly eleven times before someone informed the teams that a product shift should have been made. I don’t remember anyone questioning whether a written memo had been a good choice, given the reading disabilities common among the operators. Did no one think about what they were doing here? Did no one follow up on whether messages were received and understood?

There was also that email that Milo said he sent to all the team leaders, informing them that I would be running a series of workshops over a period of four months. Either the mail only mentioned the first workshop date or that was the only part the ten team leaders read and understood. When the team leaders later told me that they didn’t feel they were heard or that promises were made but seemingly forgotten, I didn’t have a real hard time believing that these things could happen. I was certainly curious whether anyone was listening to anything being said in the company.

Once I was sitting in the break room waiting for the weekend team to come in, I glanced through an inspection report lying on the table. One of the remarks rated “serious” concerned an operator wearing jewelry while on the line. I couldn’t help but notice the earrings Marie wore throughout the meeting, so I asked if the operators had read the report. They said they had. I asked what they thought about it. It looked good, they agreed. The safety rating had increased considerably since the last inspection. I asked if they had seen any areas in which they could further improve. Marie suggested they clean out drip pans twice during each shift rather than once because they’d received a “non-serious” mark for full pans. No one else could think of other ways to increase the safety ratings. Marie was still wearing earrings when I visited the plant the last time, about six months later.

At first I assumed that Marie’s teammates had surely read the report (just as she must have) and knew the remark was aimed at her but hadn’t wished to confront her. I had wondered the same thing when Julie told me about Marie’s product run error that had caused her to scrap two full days of production. The other team members acted as if they were totally unaware of the situation. They didn’t offer to help catch up nor did they seem to be concerned with the cause of the error, even though it would surely look bad on their productivity figures. It was even more surprising to me that the night team that followed Marie’s shift did not ever investigate or explore the reason they were so far behind. The night team was definitely angry that they would have to pick up the slack Sunday night, but they never talked with Marie about why the error had occurred.

My sense of bafflement did not end there. During my initial tour of the packaging area, I had seen bulletin boards covered with productivity data, announcements of inspections and ratings, and other miscellaneous information. Most of the operators knew that data pertaining to “tons per man hour” could be found on the board, but they were unable to say what other information was posted there. Some of the notices on the bulletin board in the packaging department were more than one year old. Wally explained that the operators could also find data related to productivity, safety, courses offered, and company functions on the company intranet, but less than 60 percent of his workforce possessed the computer skills to access this information.
Top management did not seem to manage communication better than the middle management and team members. One of the first sets of behaviors discussed on the CISAT has to do with how well the members of the organization understand the company’s goals and strategy. When asked if the majority of operators are familiar with the strategy and goals, the team members almost unanimously say yes. However, none of the operators from either of the two departments were able to say what the strategy and goals for the company are. Even though quarterly company-wide meetings are held to present such information to the employees, it’s really not so surprising that the teams haven’t “gotten the message”. Often such presentations include graphs and statistics recycled from upper management meetings that are on far too high a level to be understood by the shop floor employees. Still, why do the operators almost defensively report that they do possess this knowledge?

Informing

One word I heard over and over again in meetings with the shop floor teams, the team leader group, and even the top management meetings was “inform”. Employees were informed of changes that would be taking place; operators were informed of production changes; new team members were informed of the production team principles. When you inform someone about something, you basically tell them what you believe is important. When you inform someone, there isn’t room for question or discussion. I wondered what would happen if the members of the company stopped informing their employees and starting discussing things with them.
Getting Directions

I hadn’t planned anything at all for the team leader meeting except to summarize my meeting with Anders, Kurt, and Milo and to open the floor to discussion. All of the team leaders were present on time and Ralph surprised me by asking everyone to turn off their mobile phones for the duration of the meeting. Without complaint, they did.

I started by saying that Anders was more than willing to give the group the time they needed to work through whatever problems they were experiencing. I went on to suggest that I believed it would be a good idea to have a group facilitator present and that I was willing to either fill that role or help them find someone who could do so. The team members seemed in agreement that since we’d started this together, it would be a good idea to keep working together.

I said, “Okay, so there are a few ground rules I think we should get out of the way. First, I may take some notes while I’m in here, but those will be confidential. No one else will see my notes nor will I discuss anything that is said in our meetings unless I have your consent. I think it would be a good idea for us all to agree that what is said here stays here. What do you all think?” Everyone nodded agreement.

“The next rule that I’d like to suggest is that we make sure that everyone has a chance to say what’s on his or her mind. Let’s be sure to show common courtesy and not interrupt or all talk at once. Show mercy for me. I do pretty well with Danish as long as just one person is talking at a time; my ability to understand goes down by about half for every other person talking. If you’re all talking at once, I won’t understand much of anything. And I do want to understand.” They laughed a little. People tend to enjoy when I joke about my Danish skills.

“I guess the last rule is that we walk out of here today with something”, I said finally. I knew this last rule was vague. It was intended to be.

Sonya was the first to take my bait. She asked if I could define “something”. I told her that I could define it for myself, but that I wanted everyone in the group to define what they wanted to walk away with and then for us to decide on what the group as a whole should get from the meeting. I said, “Your individual ‘something’ might be to say something you’ve had on your mind for a long time and that you think is important to what we’re here to talk about.”

I continued, “I can start. I want to walk out of here today knowing that we’ve come at least one step further than we are now.” Chris responded quickly saying, “I think it’s unrealistic to think these problems that have been going on for months or years can be solved today.” I told him that I agreed 100 percent with him, but that I would be satisfied if we made one step in that direction.

Sonya said, “I know that I want to feel that we can solve some of these problems. Like you said, we don’t have to have a solution, but I need to know that there is one.” Jan offered, “I think I would feel like we accomplished a lot if we even knew what the
problems were. When we were talking last week, it sounded like there is so much wrong but we still don’t even know what those things are.”

Ralph nodded vigorously as Jan spoke. He then added, “I think identifying the problems would be a real good start.” I asked if there were any other comments. When there didn’t appear to be any, I asked how we could make a group objective for the day to fulfill these individual wishes.

Sonya said that it would definitely help her to define the problems, but that she didn’t think that would fulfill her own wish if we were to stop there. She explained that knowing what the problems were wasn’t really the same as knowing if a solution could be found.

I proposed that we use the first half of the workshop to identify the most serious problems and then use the second half to identify some possible solutions. Again Chris said that he thought I was being unrealistic. Charles suggested that we try my idea and if it didn’t look like it would work, we shift gears after midway. The others seemed satisfied with this suggestion.

I then asked who might like to start the discussion. Everyone was quiet and it looked like they were all waiting for someone else to start. I didn’t want to waste any more time than was necessary, so I said, “From what I heard last week, many of you feel angry because of promises made and then not honored by top management.”

There were some nods of agreement around the table. Wally sat doodling on a piece of paper and was the only one not looking at me. I thought that this must be difficult for him, knowing that he would soon be leaving the company but needing to keep up pretenses for some time.

Chris said, “This is just what I’m talking about. You can’t wave a magic wand and solve that kind of problem.”

I told him that right now I thought it was a good idea to get the problems out on the table and try not to think of what could be solved or not. We could focus on that later. Ralph said, “I think you could sum it up by saying that we don’t trust a lot of what top management says or does. And that’s when they tell us something; most often, we are in the dark and have no idea what is going on.” I went up to the white board and wrote “mistrust of management” and “lack of information”, then turned back to the table and asked if that accurately described what Ralph was saying.

He agreed and we continued this process for more than an hour, filling the board with about 15 major problem area headings. Sometimes I stopped the discussions briefly when they became heated and everyone seemed to be talking at once. Otherwise I tried to remain in the sidelines extracting the major points of their arguments and confirming them when it got quieter. When there seemed to be a lull in the group, I suggested we take a break for 15 minutes and then come back to review the list to make sure everyone had said what was on their mind. Then we could decide what the next step should be.
During the break, Sonya asked me if I didn’t think the situation looked a bit overwhelming. I looked up at the white board and could already see several patterns forming, so I told her that I actually thought things looked rather promising. She smiled and said, “You must be a more optimistic person than I am!” I assured her that it was always easier to see possibilities when standing on the outside of a situation than when personally emerged in it. I used the last few minutes of the break to make notes of what was on the board.

The rest of the group filtered back in, looking at the white board as they took their seats. I asked them to all reflect over the list to see if there were any issues that were missing or that I had misinterpreted. There were a few minor changes, for example, from “unclear expectations” to “unrealistic expectations”, but otherwise everyone seemed to be satisfied with the list. We then used about 20 minutes to put the major headings in some groupings that made sense to the team leaders. When complete, there were eight major problem areas. I could see some common themes running through them—poor or lacking communication coming in at a strong first and lack of team development following close behind. I decided not to mention this to the group in case they’d hear it as a way to minimize their problems.

Chris, my group doomsayer, shook his head slowly and asked, “Okay, now that we have this list; how can you convince us that anything will change?” I noticed a few of the team leaders gave him a weary look, but Wally’s crooked smile and quick nod seemed to second Chris’ skepticism. I was getting a little tired so I took a deep breath and counted to ten before answering. I then said, “I can’t convince you that anything will change and I’m not going to try. I’m not going to make any promises, either. The only thing I can say is that you are in a lousy situation that isn’t going to get any better by itself. You can either stay in that situation or you can try to improve it. There are no guarantees that you can, but I guarantee you that if you don’t try, it won’t improve.”

Ralph said, “I think most of us do want to try, but I can also hear what Chris has been saying all along. Some of these problems built up over a long time and it’s hard to see how we could solve them.” I looked up at the board and said, “Are you thinking mostly about the mistrust of management issues?” Chris and Ralph nodded.

I said, “That is a hard one and you’re right. We can’t go back and change the past. But I think we’ve all experienced a point in our lives where we had to accept something we don’t like and find a way to get past it. You have a new director of production now who seems eager to do things differently. I wouldn’t expect anyone to trust him from the get go, but I would hope you can see that you only can gain from giving him a chance.”

Chris said, “Words are cheap. What is Anders going to do about any of this?” I really could feel myself getting frustrated and I knew I needed to keep that to myself. Luckily Charles answered the question better than I could have. With a slightly raised voice he said, “How could he possibly do anything yet? We just got through figuring out what the problems are an hour ago; he doesn’t have a clue what’s wrong.”
It always helps to have a champion and I felt much better now that Charles had come to my rescue. I asked if we shouldn’t start looking at some possible solutions so that we could leave the meeting having fulfilled the goal for the day.

A lot of the earlier frustration came out as the team leaders proposed and then shot down one possible solution after another. I wasn’t going to tell them how I thought there problems might be solved, but I did try to guide them from time to time. I was able to use the CISAT results to help them see several of the proposed solutions could also address weak areas of CI—in effect killing two birds with one stone. Even though CI wasn’t a high priority with the group at this point, showing how solutions could be linked to the CISAT provided some structure to their problem solving. It would also make getting back on track with the CISAT easier when the time came for that.

By the time we were finished with the meeting we not only had compiled a list of problems, their causes, and some possible solutions, but also had listed some actions that could be taken by the group and by top management. I offered to neaten the list up and send a copy out to the team leaders by email prior to our next meeting. After any necessary changes were made, we could meet again and decide on the next step.

I could tell that we were all tired by the end of the 3½-hour workshop, but I took a few minutes to go around the room and ask whether everyone felt satisfied with the results so far. Chris didn’t even have anything derogatory to say. I wasn’t so optimistic to believe we’d “won him over”, but at least he wasn’t showing any more resistance.

One thing I wanted to make sure to remember was that I wasn’t there to solve the team leaders’ problems. I had lots of ideas of how they could tackle them, but I knew that if I pointed out the solutions, this would just be another quick fix for them. If they were ever going to function as a middle management team, they were going to have to learn to identify problems and test solutions together. They hadn’t volunteered for the CISAT project, but they had volunteered to participate in this meeting. So I felt like they deserved the chance to take over as much ownership of the process as they could handle. We just all needed to be a little patient!
I took the notes from the team leader workshop and arranged them into an “action plan”, with the problems they’d identified on one side and the possible solutions on the other. I then sent the plan out to the team leaders so they could check it over. I received only a few minor comments back, but since I could never been sure the team leaders all read their emails I decided I’d go around and talk with each of them individually. Ralph said he and Jan had talked quite a bit since the workshop and there were a few things they were still concerned about. He told me that there was a rumor going around that Milo would be in charge of team development for the group and “if that’s the case, we don’t want any part of it.”

I was surprised to hear Milo being mentioned since I thought he’d effectively been removed from what was going on with the team leader group. It was also hard for me to tell whether Ralph wasn’t just voicing a concern he and Jan shared. In any case, I told him that I couldn’t see why Milo would be involved and that I felt certain Anders would not make any plans without consulting the team leaders first.

Ralph then said he’d had a good talk with Anders about how things were going in the plant and how the workshop had gone. He related parts of their conversation, including how pleased the team leaders in general were with the work we’d done so far. Ralph then hinted strongly that I shouldn’t worry too much about Wally and Chris, because he had a “feeling they wouldn’t be staying” at the company. I found it hard to believe that Anders had told Ralph about his plans, even though I knew the two were on good terms. Anders had actually started his career in the company in Jan’s position, working alongside Ralph for about two years. I assumed Ralph was taking shots in the dark to see my reaction. He seemed to be hitting pretty well, but he didn’t get any confirmation from me.

Jan came into the office while Ralph and I were talking and he thanked me for a good workshop. He said that even though he realized we had only started tackling their problems, it was enough to give the team leaders some hope that some changes might be made. A couple of the team leaders had even talked about planning a weekend retreat within the next few weeks, but they didn’t want to include anyone that “wasn’t ready to be a part of the team.” I wondered if he was referring to Wally and Chris but knew asking might reveal that I knew more than I was saying. In the coming weeks, I could see evidence that a strong core “in” group was forming between some of the team leaders. Eventually those in the “out” group all left the company for one reason or another.
Before I left Jan mentioned that I might stop by and talk with Charles. He and Jan had discussed volunteering to present the new action plan to Anders and Kurt, if that was okay with me and with the rest of the group. I promised I would talk to Charles before a team meeting in the packaging department later that afternoon.

Once the action report was complete, the ball really started rolling for the team leader group. Charles and Jan did end up presenting it to Anders and Kurt and I heard they did a great job. Anders called a meeting with the team leaders just a day or two later. When I met with the group not long after, they told me that Anders had really demonstrated his commitment to helping them solve the problems on the action plan. He'd contacted the HR department and initiated a six to eight month team development program. Anders participated in several of the team building sessions to work on formulating a series of developmental goals and Kurt helped them clearly define their roles in the company. They told me that finally knowing what was expected of them helped tremendously in feeling more secure amidst a series of organizational changes that were taking place.

Chris had eventually left the company on his own accord. I wondered how much his decision to leave had been influenced by the very strong core group that had developed with the team leaders who were so dedicated to working things out. Carl went on to retire early in the summer and before long there were three new faces at the table. It looked like the team had done a good job taking the newcomers under their wings and getting them involved in the team development. I continued working with the team leaders for another four months but slowly tapered down as I saw how well they were planning new projects.

As the team leaders became more involved in meetings with other management groups in the company, they shifted responsibility for administrative tasks downward to their teams. The information they gained from their interaction in the other groups provided lots of ground for group discussion and they seemed to be thriving on this new level of communication.

I got a call from the secretary once, asking if I couldn’t find time to meet the group in the upcoming week. They were working on some new ideas for a plant wide training program and wanted to get some feedback. She laughed in the phone saying, “Isn’t that something! First we couldn’t even get them to a meeting and now here they are asking for one themselves.” I knew I was only a small cog in the wheel that got things moving for the team leaders, but I couldn’t help but feel proud of all they’d accomplished.

I’ve gone back to the team leader meetings a few times just to see how everything is going. It’s amazing to see how they take turns facilitating problem solving activities as if they’ve done it for years. I had to hide a smile as Charles reminded one of the others that they needed to take some time and reflect over what they were doing before jumping to a hasty decision. I couldn’t help but feel excited for them. After one of my last meetings, I met Anders on the way out of the plant and told him how pleased I was with their progress. He told me that when he’d first been promoted to director of production, he felt a hard knot in his stomach whenever he met with the team leaders. Now, he usually left their meetings more inspired and enthused than he’d gone in.
Building Allied Forces

I’m personally not fond of “game playing”—doing kind of sneaky underhanded things to get my will instead of being out in the open about it. So I felt uncomfortable when I realized that some of the team leaders were consciously building up “their camp” and ostracizing the team leaders that they didn’t feel fit in. On the other hand, this is pretty normal early team behavior. Once the norms start getting put into place, it’s either shape up and conform or get the heck out. It helped my conscience a little knowing that those being excluded from the “in” group were on their way out anyway. I also try to concentrate on what a strong and effective team they’ve developed in a relatively short time, even with a few additions to the team. I guess the means do sometimes justify the ends.

Fueling Up for the Second Lap

All the time I’d been working so intensely with the team leader group, I’d continued with the CISAT process in the packaging and processing departments. I’d pretty much given up on getting any kind of discussion going in the packaging department meetings. The teams didn’t have any basic knowledge of CI, so I hoped that by asking some questions and by talking about some of the concepts they might learn a little. Most often, Wally would end up answering for them and they would just nod robotically as he spoke. When they marked off their responses to the items on the questionnaire, they often hid their papers so that Wally couldn’t see what they had written. Later when I scored the CISAT, I sometimes found handwritten remarks about what Wally had said during a meeting.
Apparently the operators were not aware of the examples of CI that Wally provided for them.

There were only a few weeks of meetings left for the first phase of the CISAT when I was told that Wally would be leaving the company, so I decided just to ride things out. I hoped his successor would be more supportive of the teams’ development and that we could work together on implementing some improvements in the second phase. Still, doing little more than going through the motions of facilitating the self-assessment process was hard for me. I’d been so totally committed to the idea that the teams could and would learn by working through the questionnaire like I’d planned that I felt a bit like a failure when I saw that it wasn’t going to happen.

Things were going somewhat better on the shop floor, though. I was getting to know some of the operators fairly well and they seemed comfortable talking to me one-on-one or in small groups. They told me that nothing much had really changed for them since they’d become “teams”, but that some operators had been enthused about the suggestion program when it was first started a few years back. After awhile they had pretty much given up though because they’d all but forgotten the suggestion by the time they got any response from the improvement committee. When they did get a letter back, they had trouble understanding the reasons suggestions were turned down. Sometimes those same suggestions ended up getting carried out, but the operators that had sent the suggestion in never got their bottle of wine or cash bonus. Sometimes others might get the gift but never saw the suggestions put to use.

One evening I followed a group of operators out to their break room. Unlike the teams in the packaging department, the teams in packaging had scheduled twenty-minute breaks twice a day, plus a lunch break. Otherwise they were to be on the floor.

Linda, the young operator that seemed to have so much trouble understanding the CISAT questions, was complaining about having to take the time to clean her machines even though it was the day team’s job that week to clean. The others quickly backed her up, saying how frustrating it was that they never knew if they should or shouldn’t use time to clean up. I asked how the cleaning schedule worked, since I could hear that it switched from week to week.

Linda told me that there was a sign on the bulletin board saying which teams were to clean certain machines each week, but sometimes they forgot to check the board. Cleaning the interior mechanisms of the machines took about one and one-half hours, but you couldn’t always tell just from looking at the machine whether it had been cleaned or not. Once the product was run, dark lines would show up on the packaging if the machine hadn’t been cleaned recently. This meant scrapping large quantities of costly packaging materials and sending the product back through the recycling system. Doing two cleanings back to back of course wasted a lot of time.

I wondered to myself why the operators didn’t think to ask the operators taking over their shifts whether the cleaning had been done, but I had been in the plant long enough to know that such conversations are rare. So I said, “Wouldn’t there be some way to indicate
that a machine had been cleaned on a certain day or shift?” I was thinking about a little magnet a friend had given me for the dishwasher. When it’s turned upright, it reads “washed”; the other side reads “dirty”. I didn’t mention my magnet but hoped one of them had one at home.

They looked back and forth at each other as though I had just made some truly brilliant suggestion rather a purely simple and logical one. Tanya answered, “I guess we could make everybody sign off on the cleaning schedule that’s on the bulletin board.”

I sighed and thought, “Not the bulletin board!” Linda figured this one out for herself and said that she didn’t think anyone would pay attention to it. They all looked completely defeated, as if there was no point in continuing to talk about a problem that was too huge to solve.

I wasn’t quite ready to give up, so I asked Linda if she might have any other ideas. She looked at me and said, “I’m not any good at coming up with ideas. I’m just dumb. I can do my job but I can’t do anything else right. There are some smart people on my shift, maybe you could ask them.” She hung her head low and stared at the floor.

There are certain things that will make me get up on my soapbox every time and hearing a young, capable, attractive girl calling herself dumb is one of them. I knew I couldn’t blame Wally for her low self-esteem, but I’d heard how he talked to her enough to know he didn’t help the situation one bit. I leaned over in my chair to try to look at her eye to eye and said, “That’s a bunch of bull. You’re not dumb at all and I know you can do lots of things. Wasn’t it you that was planning your parent’s anniversary party a few weeks?” She looked up at me like she was afraid I would report her for having a personal conversation out on the floor.

“How could someone who is dumb and can’t do anything right pull off ordering tables, chairs, tents, food, and drinks for 150 people? That kind of planning takes a ton of hard work. And you did it almost all by yourself, didn’t you?” She was wide-eyed by this point. I thought she’d probably argue with me that planning a party was a lot simpler than figuring out how to verify if machines were getting cleaned or not.

Surprisingly she didn’t. She said, “That was hard. But I did it myself and it turned out great!”

I wanted to hug her. Instead, I smiled and said, “If you can pull something that big off then you can also be involved in improvements here at work. Why don’t we see if the four of us can’t come up with an idea for solving the machine problem? If the first thing we try doesn’t work, then we’ll try something else.” Linda smiled again and said, “When I was doing the party, I sometimes had to call ten different people to get things at the right price or on the right days. Sometimes I thought it wouldn’t ever turn out right, but it did.”

I had another meeting to go to so I suggested the four of us meet again the following evening. Maybe it was my imagination, but I think Linda was sitting up a little straighter when I left. I know she was still smiling.
Me on my Soapbox

Linda might not have been the brightest employee in the company, but her lack of confidence to try out problem solving and implementing improvements bothered me a lot. The company was having a hard time recruiting younger operators and much of the workforce would be approaching retirement within the next decade. If they didn’t provide the few younger employees with some reason to stay, they’d be in a real fix. Linda hadn’t been at the company long enough to become a skeptic like so many of her colleagues. With her personality, she might never be one. She was usually cheerful and friendly and willing to help her teammates, as long as she felt like she could. Maybe one of her most important qualities was that she adored the company. She liked working there, she believed in the product, and she dreamed of having her picture up on the anniversary wall one day. I thought it would be sad for the company and for Linda if she didn’t get the opportunity to use her talents.

Gloss It Over

The teams in the processing department seemed to be fairly open to discussing the CISAT, but they didn’t have a lot more to say about CI than the packaging department. There just wasn’t too much going on in terms of improvement at the team level. I was told more than once “if something needs to be done, we just do it. We don’t have to hold a meeting and make a plan.” Unfortunately I didn’t see much sign of them “just doing it”. I asked if there were ever times that they tried to solve a problem but the solution didn’t work. They all pretty much had. I asked what they did in these cases and was told, “We just try something else.”

I suggested that one of the advantages to using a system—even a very simple and quick one—for problem solving was to be able to predict what the consequences might be with
a potential solution. I explained that this type of problem solving was especially helpful when the same types of problems kept cropping up, because past experiences could help them decide which solutions might be more likely to succeed. This way of thinking seemed to make sense to them, so I made a note to bring it back up when we got to the second phase of the project when improvements were being implemented.

Operators from the evening and night teams were the first ones in the processing department that gave an indication that everything wasn’t quite as perfect as everyone made it out to be. The fifth set of behaviors covered on the CISAT has to do with management and how much management supports and encourages CI. For the shop floor teams, management was defined as the team leaders.

Gus waited until and item or two were discussed and then sighed audibly. I waited to see if he’d continue and after a few minutes of obvious deliberation, he did: “There’s no such thing as management out here, if you want the truth of it. We don’t get any information from Ralph except for what he writes up on the board. He’d rather be one of the guys than a manager.”

Henrik said, “That’s not always a bad thing. I couldn’t take it if we had somebody breathing down our necks all the time. But he could let us know what’s going on better than he does. That’s true enough.”

I asked the team how they were able to become so self-reliant if they received such little management. Gus said “That’s how we got self-reliant. We had to learn to do everything ourselves because nobody else was going to help us out.” They all ended up agreeing that Ralph was a great guy, but that he was so laid-back and even a bit gun shy when it came to conflict that he didn’t step in when it might have been a good idea. They felt like Ralph used the idea of self-directed teams to avoid dealing with situations he was uncomfortable with.

Henrik mentioned a problem with one of the operators on the day team that kept causing a machine to break down because he wouldn’t follow the preventative maintenance schedules and often left the tanks full at the end of his shifts. Henrik said they’d tried talking to the guy but he always had a ton of excuses and nothing ever changed. After a few months of the same thing happening, they tried to turn the problem over to Ralph. The response they got was “You are a team; deal with it like a team.”

Gus said that by his own calculations, the problems with that operator “cost the company one man’s pay for an eight-hour shift about ever six weeks” and had been going on for about four months.

One of the day team operators told me that the best thing about working in the processing department was that there wasn’t anything to think about. He could come to work, set his machine a few times, and then sit for most of the day. Nobody asked why he wasn’t out on the floor doing something else. I asked him if he knew why it was like that. He smiled and said, “As long as the productivity is up, nobody asks anything of us.”
kind of thinking is just so hard for me to grasp. I asked, “But how in the world can you keep productivity up if you are all sitting in the break room for more than half a shift?”

He went on to tell me that the processing department had a few advantages over the other departments. For one, they weren’t dependent on any other department to start a cycle. Raw materials were bought in huge quantities so delays on start up were extremely rare. Because their measuring system was set up to measure tons per man rather than numbers shipped or something similar, they were never penalized when an operator was on sick leave or vacation. The machines practically ran themselves, so as long as the number of operators on a shift matched the number of machines needed to put out the product, they would meet their goals.

This whole explanation was sounding just a little fishy to me and I was definitely intrigued to find out more. One of the other operators walked over and joined in on the conversation, which led me to believe that the story wasn’t totally bogus. It was the other operator that answered my question about mistakes that lead to large reworks. He said, “That doesn’t really matter. If the wrong code gets punched in and the product is bad, we throw it out. There’s a certain percentage of waste allowed for poor quality raw materials and that’s figured into our productivity goals. So we can write off the scraps on that account.” I still hadn’t heard enough. I reworded what I thought he was implying and fed it back to him, saying “So no matter what the reason you have to scrap a product, you can call it waste without it affecting your tons?” He nodded and said, “Now you get it”. The other added, “We call it glossing over”.

I could understand that glossing over was a good enough reason that no one looked into the causes of errors, but I couldn’t understand how the accounting system could continuously cover up these types of mistakes. The guys were enjoying themselves and went on to tell me that if a mistake was so big that it would put them way behind schedule, they’d just crank up another machine, without putting another operator on the shift. If the runs were timed close enough together, time in the break room wouldn’t be jeopardized. I got a flashback to Julie struggling between two machines the day Marie had messed up so many runs. I still wasn’t totally satisfied and said, “But what about real waste from raw materials that really are of poor quality?” They laughed as if were the punch line we’d all been waiting for. Apparently the waste quotient had been built into the accounting while they were using a different set of suppliers with an entirely different set of standards. Real waste was virtually unheard of now.
There are a lot of different ways companies measure performance and there are lots of different aspects of performance that might be measured. The ones I’ve run into most often are things like “on time delivery”, “number of products produced per man hour”, “number of detected errors out of total products”, etc. Granted these types of measures are relatively simple, but they serve a purpose for CI and team development. They let us know what the situation is now and what areas need improvement. That’s basically what the CISAT is designed to do, only it focuses on CI “performance”. I’m not an engineer or any kind of technical wizard and numbers don’t particularly interest me. I see measurement as a tool for working with what does interest me—team development and CI. Even though the CISAT doesn’t go into the technical side of performance measurement, it does make the link clear between performance measurement systems and improvement. Those systems have to work together. You have to know how you’re doing today and where you want to go tomorrow if you want to work out a plan to get from point A to point B.

So what do you do about improvement when there aren’t any good performance measures? Had I had my consultant’s hat on, I’d have convinced the company to trash all of their existing measures. Okay, so maybe I wouldn’t have said they should trash them, but I’d strongly recommend a total overhaul. I would have preached the importance of a variety of measures and told them that focusing only on quantity is short-sighted and in conflict with what they say they want to do with CI. Surely I’d get them to see it’s not enough just to produce A LOT without giving thought to things like quality and timeliness. Once they were convinced of the error of their ways, I’d get right into working with the teams to develop effective measures that would serve as the foundation for CI in the future. Developing a measurement system can be a great team development project because it helps the teams understand what is important for their company to survive and prosper. They learn their part in “the big picture” and they develop a lot of good team skills in the bargain.

But I wore a different type of hat those days and selling the company on the virtues of a performance measurement system wasn’t in my “job” description. I could of course make suggestions and I planned to. What would happen with CI until they realized they needed to make these changes? Not much, I feared.
Low Season Learning

Most all of the teams had a lot to say about the CISAT items that dealt with learning. From what they told me, this was a pretty sore topic because requests for courses and training were almost always denied. They felt that the annual team training they received at the Adult Education Center was “just busy work during the low season” and didn’t benefit them in any way. I asked if they had told Ralph or anyone else that the courses weren’t helpful. One operator shrugged and said, “They know it, but they tell us to remember it’s better than getting laid off.”

I found this attitude a little hard to believe, so I kept the conversation going. I said, “Ok, I know lots of companies do training during low season to keep the operators busy when there isn’t that much regular work to do. But that doesn’t mean the training can’t be beneficial. It could be your chance to get in some training that you can use throughout the year. Who decides which courses or training you receive?” Henrik said that the former HR representative had arranged the course schedules with the education center about three years before and it was the center’s own course instructors that decided what would be taught. Sometimes these were courses on how to use the Internet or create text files, sometimes they dealt with goal setting, and others had been a mix of communication and team building exercises.

I said, “Well, have the teams gotten anything out of the team building or goal setting?” Gus said, “We have only one goal and that is tons per man hour. Somebody way up top sets that goal, so how much time do we need for goal setting? And as for team building, that’s a good one. Haven’t you noticed yet that the word “team” doesn’t mean anything around here?” I had of course noticed that the word “team” didn’t mean a lot in the company, but I wasn’t going to say that. Instead I decided we might explore that a bit.

“Why do you feel that the word ‘team’ doesn’t mean much?” I asked. Henrik replied, “We have teams because that’s what everybody else has. They believe it makes us look good in the news. But we’re only teams during low season and no body ever even says the word when we get busy.”

There wasn’t too much time left before the meeting should end, so I asked what types of training and education courses had been requested and denied. The mechanic told me that he’d been asking for two years to attend a certification course that would allow him to repair two of the machines on the floor, but he was denied due to costs.
I asked him if the course was expensive compared to those at the education center and he said, “They don’t pay for the education center; the state does. They’d have to pay for my certification, so Ralph won’t even put it in the budget. He doesn’t even care how many down hours we have out here at night because the only one qualified to touch those machines is on the day shift.”

Henrik said, “We’ve also asked about on-the-job training so that all of the operators can run all of the machines, but that got turned down too. Costs too much.” I thought of all the time the operators sat in the break rooms and wondered why on-the-job training couldn’t be done while other machines were set to run automatically. I just wasn’t sure how to bring the subject up without making it sound like I thought they wasted half of every shift sitting in the break room.

I asked if we couldn’t take up our discussion on training during our next meeting. In the meantime, a steering committee meeting was planned and I knew there was a lot for us to talk about.

Roadblocks

I sat down at my dining room table with all of the teams’ CISAT questionnaires in front of me so I could try to figure out where to go from here. Had I mentioned before that I don’t like giving up? Maybe I was just tired. I’d been meeting with the seven teams both in meetings and out on the floor for almost three months now. Evening, night, and weekend shift hours didn’t fit well with my other responsibilities and it was definitely catching up on me. Still, I knew that wasn’t the real reason I was feeling so tired. It seemed like everywhere I turned with the teams, there was another roadblock. I could help them learn some CI skills, but until some major changes were made “up top” I didn’t see how the teams could really use them. Or even why they should. Somehow I had to find the right way of telling the steering committee that what I was doing with the teams wasn’t going anywhere.
Laying the Cards Out on the Table

At the last official steering committee meeting, there was reason to both celebrate some of the positive changes happening in the company and question some of the problems that had surfaced during the past six months. Anders and Kurt were still enthused about the team leaders’ progress and everything pointed to their continued success, even though the company was now facing bigger changes than ever before in its history.

On the other hand, I had to admit that I was very disappointed with how little the shop floor teams had gained from the CISAT process. Without sparing words, I basically told Kurt and Anders that even though I would continue to work with the teams on CI implementation, it wouldn’t account for much in the whole scheme of things. There were just too many organizational issues that needed to be dealt with before any real work could be done with the teams.

The first fundamental issue that I felt had to be addressed was the purpose for having teams. Just like the team leader group, the shop floor teams lacked a clear and meaningful purpose for being organized into teams. While it hadn’t been especially hard to create that purpose with the team leader group, I felt that it would be a big problem with the operators. The structure of their work didn’t really support a team structure and it looked like the main reason teams had been organized was to follow the latest fad in Danish manufacturing. There was little to no information flow to and from the shop floor, so tasks like goal setting, production planning, and performance measurement couldn’t easily be shifted down to the team level. There were in fact lots of changes that needed to be made if the team concept would be successful, but the first question to be answered was how teams fit into the overall strategy.

The operators themselves were questioning whether the team concept would be dropped entirely or if it would continue in name only as it was now. I could tell Anders was between a rock and a hard place with the team issue. He couldn’t really justify having teams, but he knew that he couldn’t just announce that the team structure would be dissolved after it had been in place for almost five years. He knew that one of the problems already facing the company was that there had been too many fads of the month that weren’t taken seriously.

On the other hand, he didn’t have the time or budget to invest in serious team development that might benefit the company. Harry agreed it would be a mistake to get rid of the teams, so the next step would have to be fitting them into the overall strategy.
Everyone needed to understand how teams supported the company’s objectives. Even though that kind of thinking should have happened years before, it could still be done. I suggested that CI might be one way to make the teams a part of the company’s strategy; Harry offered the idea of multifunctional teams as another alternative. These were clearly issues Anders and Kurt would need to discuss in depth.

Our discussion of the situation with the teams led naturally to the problems with training and development programs. If there were to be teams, then they needed to be trained and developed somehow. An enormous amount of time and money was being spent on sending teams to the Adult Education Center each year, but they had virtually nothing to show for those expenditures. One obvious solution to at least part of the problem would be to work more closely with the center to tailor courses to the needs of the teams.

Whatever training and development that was to take place would need to be clearly tied to the strategy we’d just been talking about. I told them that I also believed there were many small things that they could do to get more out of their training bucks. For example, I felt strongly that there needed to be some kind of system to follow-up on whether the learning objectives had been fulfilled.

Obviously, that meant that learning objectives needed to be defined for each and every course. I explained that even a simple system would give them feedback needed to continuously improve the courses and at the same time, show the teams that the company valued the training. As it was, no one asked if anything was learned so it was assumed that it was not important. I believed the teams themselves were capable of identifying their training needs.

I saw this as a good opening to ask about the suggestions the processing teams had made concerning training and certification classes. Kurt and Anders were both surprised to hear about the latter and assured me that they would look into it. They guessed that Ralph didn’t submit the requests because he wanted to keep his budget as low as possible, but they could see that it was a shortsighted way of thinking on his part.

They had however spoken with some of the operators about on-the-job training I’d heard mentioned. Anders shook his head and said, “I’m the one that turned that suggestion down. The teams want to have each operator in a full-time training position for up to three months. That means that for those three months, we’d be paying out a full salary to an operator that isn’t producing anything.” As I’d suspected, the teams were not willing to consider using any of the time between machine cycles to conduct training. I asked what they would say if the teams did come up with a suggestion for doing on-the-job training that was more reasonable. Both Anders and Kurt assured me that they would fully support such a suggestion.

I mentioned my observations about the measurement system and told them that this was another area that I thought needed some attention. They didn’t have any trouble understanding that the current system was faulty and was essentially useless for basing improvements on.
I promised to keep in touch with the two of them during my last weeks in the plant and Harry, Frank and I offered to meet again if they wanted to discuss any of the issues brought up at the meeting.

Wrapping up Lose Ends

The processing department finished the CISAT questionnaire a little earlier than the packaging department, even though they started later. The teams in processing had seemed to grasp the concepts on the questionnaire more quickly, but a major crisis that occurred in the last weeks in the packaging department had also delayed their progress. I never did get the whole story, but I do know that a group of operators from the day team had been so upset with one of the newer operators that they had threatened a “sit down”.

Wally told me that the operator in question, Sara, had apparently been producing too much, which made some of the older operators angry. I don’t know if the term is still used much, but Sara would have been called a “rate buster” back when I was learning about union negotiations in school.

The older operators tried to get Sara to keep pace with the others “so no one looked bad”, but she hadn’t taken their advice. A few times she was even accused of working through her break to get an order out of the door. The employee union representative had been alerted and before long, there were rumors flying about an illicit relationship between Sara and some of the team leaders.

Wally couldn’t get the teams to do their work as long as Sara was on duty but didn’t want to fire a good operator simply because she wasn’t popular. Several short meetings were held with other teams in the hopes that they would be willing to give Sara a chance on another shift. In the end, Sara ended up being transferred to another department and the day team seemed to feel they had won an important battle. One of the night operators whispered to me “there’s no telling what they [the group of older operators] could do now, if they wanted to”. I never did get any more clarification from her, but I did notice that the brief productivity peaks on the bulletin board soon fell back down to an average level.

Wally left the company during the time I was scoring all of the CISAT results for the teams in his department. When I returned, I asked how some of the operators how the
teams had reacted to his leaving. A few shrugged like it was not a big deal and others told me that they saw it as a good thing for the teams. Apparently out of sight out of mind. He wasn’t ever mentioned again as far as I know.

I’d met with Linda a few times after we’d talked about the machine cleaning problem. She had gone home that first night and worked out a checklist that could hang on the side of the machine so that the operators could initial the different tasks as they were completed. I could tell she was anxiously awaiting my sign of approval and I was more than happy to give it. The solution was a simple but very effective. Now we just had to figure out how to get everyone to use it!

From my regular visits with the knowledge center team over the past couple of months, I knew they had come a long way on developing informal presentation skills. I had also seen that the magnetic signs they’d made during their project work were being used regularly, so I suggested to Linda and the others that they meet with a few of that team’s members and get some suggestions for implementing the check list.

Charles had been transferred to Wally’s position by the time phase two got underway. Even though he was coming in on the tail end of the process, we agreed that it would be a good idea for him to attend a meeting so he could get a feel for what the teams were doing. When we arrived, Linda was already seated and was positively beaming. She told us that the checklist had been used for four days by all three of the teams.

The different teams still weren’t talking with each other, but they were communicating! I asked Linda if she could explain to the team how she’d identified the problem and then come up with a solution. She blushed a bit and looked uncomfortable for a few minutes, but then fell right into talking about how she and the others had worked through the process. I played devil’s advocate a little, asking the team what they would have done if the other teams hadn’t used the checklist or if they stopped using it at some point. They came up with several different scenarios, ranging from fairly reasonable ones to the outright absurd. But they also came up with some possible solutions and that was the important part, as far as I was concerned. Charles commended her on implementing an improvement that would end up saving the department considerable money and aggravation over the long run.

Linda’s problem solving was a good springboard for beginning to look at the results of the CISAT and to begin implementing some CI activities. I even borrowed her story and used it as an example with the other teams. All in all, the problem solving and planning of some CI activities in the packaging department went much better than I would have expected. Not all of the operators participated in the discussions, but well over half did. They complained a lot in the first stages, saying that nothing they would do would make any difference, but most seemed to come around. I used the white board to show them how to create simple cause and effect diagrams—not necessarily because I thought they would use them, but so they could see that there are lots of ways to look at a problem.

Each of the teams ended up implementing one improvement before I finished the main part of my research. I didn’t try to push them to do more because they just weren’t geared
up for it. I figured if they could really learn and work through a single successful improvement implementation, they might just be tempted to try it again.

In my last weeks in the plant, I tried to spend a lot of time out on the floor supporting the operators with their new projects. Sometimes they would reach a bump in the road and be quick to give up when they didn’t see a solution. I used the progress of the projects to talk about different aspects of problem solving and CI implementation when we met each week.

The evening team planned an “open house” in their work area and invited other teams to come and visit. The idea behind the project was for teams in adjacent work areas to gain a better understanding of the different work processes. One of the operators had come up with the idea when we’d been talking about internal customers. She still thought a customer was someone that came into a store to “buy”, so she used that theme to show how what she makes is “sold” to the next link in the chain. I tried to act like a fly on the wall and just see how the teams interacted. I was pleased that they were even talking to each other. I got a kick out of one operator asking someone from another team how her she would rate their “service”. It was a start!

I can’t say that any of the improvements made in the packaging department during the course of the project will have earth-shattering effects on performance. Still, considering where they started, I do feel good about their progress. Charles has an entirely different personality and style than Wally did and I expect he is a good match for the position. As with most anything, time will tell.

I said my goodbyes all around and promised to visit the plant again after summer vacation to see how the teams were doing.

Apathy

Ever since my first few meetings in the processing department, I had believed these teams to be capable of implementing CI. I hadn’t seen much CI going on, but the operators seemed to understand many of the concepts and principles and they were willing to discuss new ones.

Unfortunately, they also seemed to lack drive and motivation for CI or anything that did not directly affect them. The operators that were involved in improvement activities with Jan had “volunteered” only when as he asked them to participate in changes made to their
own work processes or machines. Henrik told me that attending the improvement meetings was the only way to ensure that “nobody messed with his work area without him knowing about it.”

With some pressure, I was able to convince the teams to pick one or two of the weaker areas of CI shown on the CISAT to use as the basis for some problem solving and CI exercises. Like the teams in the packaging department, there was a good deal of grumbling that nothing they would do would be meaningful. Unlike the teams in the other department, this defeatist attitude carried through the rest of the meetings. They went through the motions, but nothing more.

One of the teams received almost immediate approval of an on-the-job training plan, but they didn’t seem overly enthused. In fact, Gus told me “Give it two months and it will be forgotten.” I tried to take comfort in the fact that the team had learned to construct and present a good project plan to management, but I couldn’t see where the operators took much satisfaction in having learned new skills.

I couldn’t see myself drawing fishbone diagrams on the paper napkins scattered on the lunch tables, so I verbally walked each of the teams through a few cause and effect cycles using some problems I had observed out on the shop floor. They didn’t have a problem grasping that several causes and solutions might exist to a given problem, but more than one operator expressed a “if it’s not broke, don’t fix it” attitude. It seemed to me that the department’s high performance kept the teams from seeing any situations as problematic.

When I returned to the plant a few months later, I asked some of the operators to try to explain to me why there had been so little interest in CI, especially towards the end. Henrik told me that “somewhere around the time we were finishing the questionnaire it became clear to a lot of us how things really are here. We don’t have the power to change things and we’re tired of hoping that things are going to change. Maybe Anders is different and he will do some of what he talks about. Then maybe we’ll feel like doing more. But we’ve been burned before so we’re just going to have to wait. You shouldn’t take it personally though. Maybe if you were here for another year, it would have ended better.”