

OPPM and Strategy Execution

Two retired CEOs, friends for over three decades, exchanged memories about their business experiences. One was previously managing partner of the biggest private real estate firm in the country and was now chairman of a successful airline. The other had, for 12 years, directed O. C. Tanner, the 80-year-old global leader in recognition and appreciation. This time they spoke of ideas and tools that had made their work easier and more effective. What really made a difference? One comment resounded with the usual candor and clarity that always accompanied their conversations. “OPPM was simple, yet it was the single most valuable tool I used to execute the strategy and get the right things done,” insisted Kent Murdock, retired Tanner CEO. Those “right things” included lifting sales, increasing profits, and enlarging stockholder return to the highest levels in company history. Joel Peterson, current

chairman of JetBlue and faculty member at Stanford's Graduate School of Business, added that "if OPPM could communicate strategy simply, and could align execution of that strategy to people, processes, and performance metrics, on a single sheet of paper, it should be in every CEO's toolkit."

In their #1 *New York Times* bestseller *Execution, The Discipline of Getting Things Done*, Larry Bossidy and Ram Charan said:

Along with having clear goals, you should strive for simplicity in general. One thing you'll notice about leaders who execute is that they speak simply and directly. They talk plainly and forthrightly about what's on their minds. They know how to simplify things so that others can understand them, evaluate them, and act on them, so that what they say becomes common sense.

Bossidy and Charan teach that execution is a "discipline for meshing strategy with reality, aligning people with goals, and achieving the results promised . . . linking the people process, the strategy, and the operating plan together to get things done on time."

HOW DID THE ONE-PAGE PROJECT MANAGER (OPPM), A TOOL DEVELOPED FOR PROJECT MANAGEMENT, GET TANGLED UP WITH STRATEGY?

Clark relates the following about the coming together of the one-page project manager (OPPM™) and

Lean—how OPPM found its way into strategy deployment through pursuit of the Shingo Prize:

The sun broke fully from behind the disappearing clouds, unseasonably warming the winter morning in Salt Lake City, Utah. My wife Meredith and I observed as the families of the bride and groom were escorted, following the ceremony, into planned poses by an experienced and demanding photographer. The daughter of close friends from our college years was the happiest of brides, beautiful and basking in every moment of this, her day.

Meredith's attention was drawn to the sister of the bride, mine to her uncle. The rest of the story is about execution (getting things done) and therefore a most fitting beginning to this, the third book in the OPPM series.

Uncle Stephen M. Beckstead, PhD, associate director of the Shingo Prize for Excellence in Manufacturing, had traveled in for the wedding. We at O.C. Tanner Company were striving to meet the Shingo standards and win the prize. Time between the various photo set-ups provided an opportunity to visit with Steve, and open discussions concerning our readiness for an application.

Quality had always been a passion of Obert Tanner, founder, in 1927, of the company that carries his name. We organized a formal quality department in 1980 and hired outside consultants, for the first time, to help us with metrics and proven processes. I became vice president for quality in 1996, and in

addition to the work of our department, observed the efforts of Harold Simons, executive vice president of manufacturing, to incorporate Lean principles and practices into the manufacturing operations.

It was January 2, 1999, as Dr. Beckstead and I visited between wedding pictures. O.C. Tanner had been attempting for several years to eliminate manufacturing waste, to apply portions of the Toyota Production System, and to imbed Lean principles and practices into our operations. We certainly had come a long way, but was it far enough? Was now the time to apply?

After sets of probing questions, Steve agreed to visit our plant for a high-level assessment. Immediately following his visit and encouraging conclusions, I decided the Tanner Company should apply for the Shingo Prize. Harold was skeptical, knowing that much work still needed to be done. Moreover, our marketing leader worried that our then current level of quality problems, although measurably less than our competition, would preclude us from winning the prize. Senior management, however, gave me the go-ahead to apply.

As a member of our operating committee, I approached my peers across the firm, asking for team members to complete the substantial application. With departments already running beyond capacity, coupled with an absence of confidence that we were yet good enough, no operating leader was willing

to deploy the quality of talent necessary to tackle the arduous task that lay before us, especially given a short lead time prior to the application deadline.

What happened next should not have been surprising to us. We extended a general invitation for volunteers to anyone who would be interested in working on our Shingo application. We advised them that it would be a project taking about a month, and the team would begin working each evening at 5:00 PM and go until midnight! The response was most encouraging. A full team comprised of all the necessary skills just happened to show up.

Together, we collected the data, going back over the years of effort and results, and completed the required application. Following their meticulous review of the application, a team of three Shingo examiners were deployed for a comprehensive site visit, verification, and analysis. Several weeks later, the Tanner Company was notified that, indeed, we had successfully “challenged” and were awarded the Shingo Prize for Excellence in Manufacturing.

Following the receipt of the prize, I accepted a position on the Shingo board of governors. After completing my term of service on the board, Harold Simons filled my spot, where, as of this writing, he continues to add a depth of experience as not only a student of Lean, but as one who has merged the Toyota Production System with Lean thinking, OPPM, and A3 reports. He passionately drives Lean

practices in manufacturing and advances their adoption throughout the entire enterprise.

Harold directed 4 members of his staff to, in addition to managing Lean efforts at Tanner, become scrupulously trained and then volunteer as Shingo examiners themselves.

Now before we move on, how did Meredith do in her efforts to secure results? She found her way to the sister of the bride and suggested that it might be well for Jenny to date our son Jarv. Over the mild objections of her siblings, Jenny and Jarv did call each other, even though they were attending universities in two different cities. And speaking of getting things done, they were engaged three months later, married four months after that, and now, at the time of this writing, have happily welcomed their fourth child into their cheerful family.

O.C. Tanner Company was now conversant with and committed to Lean. Kent, however, was vigilant in reminding us of the pitfalls associated with an obsessive devotion to a single business “doctrine.” He demanded that we “wrestle it through” until we found the right balance and right fit for each set of ideas.

An almost unavoidable, certainly natural confluence of events seemed to thrust OPPM toward the execution of strategy. The tool promotes and supports Lean thinking and is itself Lean, pushing so much of the waste (or muda, as Toyota would say) out of the project communication process that it became an integral part of O. C. Tanner Company’s continued Lean pursuits and our

efforts to use the right mix of strategic principles. This included incorporating and aligning OPPM with our iterations of Dr. Robert S. Kaplan's Strategy Map and its accompanying Balanced Scorecard.

While Mike and I both labored with these powerful ideas at our firm, Mike continued to teach Lean principles to his evening university students, and I found myself traveling and speaking more frequently on OPPM.

As previously mentioned, Mike was the first to recognize how OPPM fit into Toyota's Lean, single-page A3 report. He incorporated it and drove hundreds of problem-solving projects, some small and some rather large, using OPPM/A3s. Together, we designed our balanced scorecard, linked it to the corporate strategy map, and aligned it, through our project-management office, to the prioritization of corporate projects and their subsequent performance metrics. A certain clarity emerged. Every employee was more conversant with, committed to, and engaged in getting the right things done. Strategy was being executed.

While this was incubating at our firm, hundreds of thousands of OPPM templates were downloaded from www.onepageprojectmanager.com to individuals, firms, and even governments across the globe. From a university president requiring OPPMs for every project coming across his desk to a mother planning her daughter's wedding. From a CEO in Beijing, China to a project manager in Madrid, Spain. From a managing partner of a giant consulting firm in Boston to a boomer mom in Saratoga, California. From a program manager in Abu

Dhabi to the U.S. government, which has used the system extensively in pandemic planning and the tracking of the globalization of the FDA, with offices in China, India, Latin America, and Europe.

We will now try to share with you, in this short book, examples of how you can use OPPM and A3 to drive strategy and solve problems—indeed, how these tools will help you simplify Lean improvements and communicate essential elements of the Toyota Production System on a single sheet of paper. We will show you a proven path to engage your team to execute your strategy.

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