

## **Module 3: Team Roles and Relationships**

# Module 3

## Team Roles and Relationships

Upon completion of this module, you will be able to:

- Identify types of TQL teams
- Define team roles
- Describe an effective charter
- Evaluate a charter
- Conduct group process observation
- Create a storyboard

10/95 Team Skills and Concepts - Module 3, Viewgraph 1

### Module 3: Team Roles and Relationships

Upon completion of this module, you will be able to:

- **Identify the types of TQL teams**

You will learn the definitions of ESCs, QMBs, and PATs, what the functions of these teams are, and who in the organization typically makes up their membership.

- **Define team roles**

We will identify and describe the responsibilities of the team leader, quality advisor, recorder, and other team members.

- **Describe an effective charter**

We will list and discuss the characteristics of an effective charter.

- **Evaluate a charter**

Through an exercise in charter evaluation, validation, and revision, you will learn how to assess a charter's usefulness and provide guidance to teams for creating effective charters.

- **Conduct group process observation**

Watching and collecting data on how team members interact is the first step toward improving how teams work together. We will introduce the concept of group process observation, and you will have an opportunity to observe, take notes, and reflect on how different it is from participating in the group's work.

- **Create a storyboard**

We will describe what storyboards are, and how they are used by process improvement teams. You will see some examples and begin to create one of your own as a part of a case study.

Identifying the right individuals to work on teams, providing clear direction, and providing adequate leadership and support becomes critical to the success of the team and ultimately the organization.

# Types of TQL Teams

- Executive Steering Committee (system owners)
- Quality Management Board (process owners)
- Process Action Team (process workers)

10/95 Team Skills and Concepts - Module 3, Viewgraph 2

## Types of TQL Teams

The DON approach to implementing TQL advocates a specific quality improvement team structure. This structured approach consists of the following teams:

- **Executive Steering Committee (system owners)**

The team of guiding members of an organization who comprise the highest level quality improvement team in the organization.

- **Quality Management Board (process owners)**

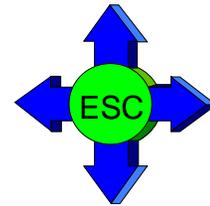
A cross-functional team composed of managers, usually of the same organizational level, who are jointly responsible for a process, system, product, or service.

- **Process Action Team (process workers)**

A team chartered by the ESC or a QMB composed of individuals from within a single command function who work together on a stage of the process.

## Executive Steering Committee (ESC)

- Composed of senior leaders (system owners)
- Leads process management efforts
- Participates in process improvement activities
- Charters teams for process improvement
- Identifies and provides resources
- Leads the transformation
- Begins strategic management



10/95 Team Skills and Concepts - Module 3, Viewgraph 3

### Executive Steering Committee (ESC)

- **Composed of senior leaders (system owners)**

In DON organizations, the top-level quality improvement team is the ESC. It is composed of the most senior managers and key leaders in the command—the CO, XO, military and civilian department heads, and the command Master Chief or Sergeant Major. These are the leaders who are responsible for improving mission effectiveness, which is the focus of TQL. There is only one ESC at each command, and the CO is the team leader for this group.

- **Leads process management efforts**

This includes identifying and prioritizing major external customers and their requirements, and significant processes of the organization; developing a customer feedback system; and identifying and defining quality characteristics that customers require. For operational units, identifying mission effectiveness criteria might be the starting point for process management.

- **Participates in process improvement activities**

Top leaders in DON organizations are expected to be actively involved in early process improvement activities. In a few minutes, we will discuss some guidelines for selecting initial process improvement efforts, usually called pilot projects. (The *Implementing TQL* course provides more detailed guidance.) It is also important for the ESC to continue to stay up to date on who the major customers are, what their needs are, and what the command's significant processes are.

- **Charters teams for process improvement**

Once the senior leaders have identified significant processes and are ready to begin process improvement efforts, the ESC should charter subordinate teams (Quality Management Boards or QMBs) to actually work on the processes they have identified. We will learn more about charters and QMBs later on in this module.

- **Identifies and provides resources**

In order to be effective, lower level teams such as QMBs need time, training, and support for their decisions. Personnel to fulfill other roles, such as the TQL coordinator and quality advisor, must be selected and trained. It is up to the ESC to provide these resources.

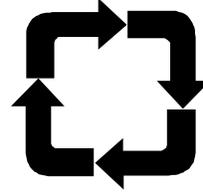
- **Leads the transformation**

As we learned in Module 1, top leaders in DON organizations are responsible for managing the cultural change that we call "transformation." This includes identifying and removing barriers to the new philosophy, as well as role modeling and reinforcing new behaviors that create a quality-focused environment.

- **Begins strategic management**

Once the ESC has a good understanding of how to improve mission effectiveness through process improvement activities and application of the 14 Points, they can begin to think about how to bring a strategic focus to their management of the organization. As we discussed before, this may mean developing and deploying a strategic plan.

# Process Selection



- Identify significant processes
- Select processes related to mission accomplishment
- Select processes that are customer focused
- Use a systems view to select processes

10/95 Team Skills and Concepts - Module 3, Viewgraph 4

## Process Selection

Before we go on to discuss QMBs, let's take a minute to talk about some guidelines for process selection, since this is one of the ESC's most important tasks.

### ■ Identify significant processes

The first step in selecting processes for improvement is to identify the organization's significant processes. Significant processes are those which begin with an external customer requirement that can be traced back through the process of an organization to the input. Therefore, they are cross-functional by definition. These are the processes that are so important that you can't accomplish your mission without them. If improved, they will affect customer outcomes. It is the job of the ESC to identify and prioritize these processes for improvement. Senior leaders learn the basic steps for doing this in the *Senior Leader's Seminar*.

### ■ **Select processes related to mission accomplishment**

One of the most common mistakes teams make when they initiate their process improvement efforts is to start with processes that are only indirectly related to the mission. For example, they may choose an administrative function like preparing the watchbill. You may want to look at support processes eventually, but they aren't the highest priority. The most important processes are those that keep you in operation, that affect mission accomplishment.

### ■ **Select processes that are customer focused**

The ESC should be concerned first with those processes that affect the external customer. Once the significant processes have been identified and improved, you can spend resources on improving processes that affect internal customers.

In summary, the ESC should select for improvement those processes which directly affect the mission and the external customer.

### ■ **Use a systems view to select processes**

Sometimes the work force is solicited for suggestions regarding processes they perform as a means to identify opportunities for process improvement. Of course, no one understands process problems better than the person performing or working on or with the process. But workers in the process usually don't have a systems view of the organization. So it is important to remember that the senior leaders provide strategic direction for all process improvement teams. Only in this way can you be sure that your efforts will optimize the organization as a system.

Many commands have used strategic plans to help them identify their significant processes; they often are centered around the strategic goals. This isn't always necessary, though. The ESC simply needs to identify its mission and processes, then determine which of their processes have the most direct, measurable effect on the quality characteristics that customers want most. The *Methods for Managing Quality* course teaches tools which can help make that determination.

## Selecting the Process for Initial Improvement Efforts

- The process is mission essential.
- It offers the greatest opportunity for improvement.
- Improvement is visible in a short time.
- The process is not undergoing major transitions.
- It is relatively simple, with clearly defined starting and ending points.

10/95 Team Skills and Concepts - Module 3, Viewgraph 5

### Selecting the Process for Initial Improvement Efforts

Additional selection criteria may be applied by the ESC as they reach consensus on *initial* process improvement efforts. It is critical to have the appropriate people involved and to have them develop a sense of ownership in the improvement effort. Having higher and subordinate levels involved in an iterative selection process is an important first step.

A good candidate for initial improvement efforts typically exhibits the following characteristics:

- **The process is mission essential.**

It is important because it has value and credibility with the workforce.

- **It offers the greatest opportunity for improvement.**

Choose a process that provides the greatest opportunity for improvement, especially improvement that can be recognized by the customer and measured easily. Select a process that directly affects external customers. It is critical to develop measurements that translate the needs of the customer into action. Before such measurements can be determined, it is necessary to identify the aspects of a product or service that are important to the customer. These aspects are what we previously referred to as quality characteristics. Some examples of quality characteristics are timeliness, reliability, durability, or ease of use.

- **Improvement is visible in a short time.**

Target an issue that is likely to exhibit a high degree of improvement in the shortest possible time. If you choose a process that recycles once every day or so, the effect of changes will show up in a relatively short time, perhaps only a few weeks.

- **The process is not undergoing major transitions.**

If you select a process that is undergoing major transitions, it will be difficult to stabilize and impossible to measure.

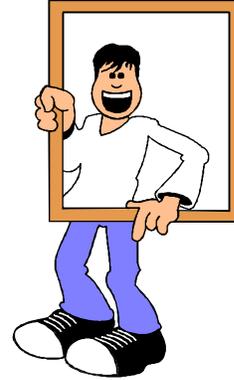
- **It is relatively simple, with clearly defined starting and ending points.**

Select a process that is relatively simple, with clearly defined starting and ending points. This is not the time to study a large or complex system. Such a system would have to be broken down into its component processes and subprocesses.

In summary, some of these process selection criteria are not just limited to an initial selection, but can be used as guidelines for selection of all process improvement efforts. Remember, success generates success, and positive results with maximum publicity will gain support for your implementation efforts.

# Process Boundaries

- Where does the process start?
- What are the inputs to the process?
- Who (suppliers) do the inputs come from?
- What are the macro steps in the process?
- What functional areas are involved?
- Is the process cross-functional?
- Where does the process end?
- What are the outputs?
- Who (customers) receives the outputs?



10/95 Team Skills and Concepts - Module 3, Viewgraph 6

## Process Boundaries

Only a clearly defined process should be selected for initial process study. ESCs sometimes make the mistake of selecting a desired solution or issue instead of a process or system. Answering these questions will help ensure that the process selected is well defined and members are appropriate for the team.

- **Where does the process start?**
- **What are the inputs to the process?**
- **Who (suppliers) do the inputs come from?**
- **What are the macro steps in the process?**

- **What functional areas are involved?**
  
- **Is the process cross-functional?**
  
- **Where does the process end?**
  
- **What are the outputs?**
  
- **Who (customers) receives the outputs?**

If the results of the team checklist or process boundary analysis reveal that the team's membership needs to be modified (i.e., add, delete, substitute), take the appropriate action or work with the team sponsor (i.e., QMB or ESC) to ensure that appropriate changes in membership are accomplished. The charter, which we will discuss in a few minutes in more detail, should define the membership, limits of authority, and process boundaries.

In order to properly identify and define a process, it is important to identify your customers and suppliers. There are internal and external customers for any process. Each person involved in a process is both a customer and a supplier. In the customer role, each person in the process receives a product, input from a preceding operation or step. This input could be raw material, a computer printout, etc. Upon receiving input, a person (or team) performs his or her designated task(s) in the process and, in the supplier role, passes the product (output) along to the next person in the process. Each worker assumes the roles of both customer and supplier. This customer/supplier relationship continues down the line until the final product goes out the door and is delivered to the external customer. External customers are the final end users in the process.

Perceiving the next person in the process as a customer and trying to meet or exceed that customer's requirements can greatly facilitate process improvement and should be encouraged throughout the organization. However, sometimes organizations become so wrapped up with promoting good internal customer/ supplier relationships that they tend to forget about the external customer. The primary focus must be on the external customer.

## Quality Management Board (QMB)

- Composed of middle managers (process owners)
- Develops a plan for process improvement
- Initiates process analysis
- Charters Process Action Teams
- Begins continual process improvement
- Recommends major process changes to the ESC

10/95 Team Skills and Concepts - Module 3, Viewgraph 7

### Quality Management Board (QMB)

- **Composed of middle managers (process owners)**

A QMB is a cross-functional team composed of the managers who are jointly responsible for managing a significant product or service process. Each manager has some stake or ownership in the success or failure of the process producing the product or service under consideration. A QMB is chartered when the process associated with a mission requirement or a customer's quality characteristic has been prioritized and selected for improvement.

A QMB lasts only as long as the product or service is important to the organization. If the process is no longer strategically important to the organization, then the QMB's charter would be recalled by the ESC. However, most significant processes are so closely linked to the mission that they don't change very often. Thus most QMBs are relatively long-standing.

If a process is very large and complex, it may be necessary to establish a hierarchy of QMBs, with a high-level QMB overseeing the coordination of one or more lower level QMBs. This coordination ensures that the efforts of the lower level QMBs do not suboptimize or conflict with each other. In other words, the higher level QMB is managing a network of processes (a system).

Under no circumstances should a higher level QMB charter a lower level QMB simply to have other people do its work. Lower level QMBs should have charters that support the aims of the higher level QMB's charter.

- **Develops a plan for process improvement**

The primary concerns of a QMB are planning and executing the process improvement efforts identified by the ESC.

The QMB is responsible for translating its charter into a process improvement plan. One of the first things the QMB must tackle is to further flesh out the macro-level flowchart provided in the charter. Since the QMB is composed of the process owners, its members collectively know more about the process than anyone. They also are in the best position to refine the planning details for developing, testing, and evaluating process improvement.

The QMB also needs to translate the quality characteristics identified by the customers into measurable characteristics.

- **Initiates process analysis**

After flowcharting the process selected for study to identify all of the steps, the QMB may want to simplify the process by working on obvious omissions or duplications in the process flow. Changes, if any, will require standardization of the new process, probably through training and/or new instructions. The QMB may need to charter a PAT to help collect current process performance data. These data can be used later for determining the effectiveness of process changes. After simplifying the process, the QMB works with the PAT to stabilize the process by removing special causes.

### ■ Charters Process Action Teams

During process analysis, the QMB is responsible for collecting baseline data on process performance. The QMB may charter a PAT to help, as necessary, in this data collection and analysis.

The QMB must be ready to provide the PAT with resource and decision support. This should be spelled out in the charter provided to the PAT.

### ■ Begins continual process improvement

Once the QMB has simplified, standardized, and stabilized the process, its primary responsibility becomes the practice of continual process improvement. This includes planning details to design, test, and evaluate process changes using the PDCA cycle.

Based on data received from the PAT, the QMB evaluates the effectiveness of the changes to the process under study. Before it permanently introduces changes to the process, the QMB must ensure that no other part of the process is suboptimized at the expense of the aims of the system.

### ■ Recommends major process changes to the ESC

The cost or scope of a proposed process change may be beyond the authority spelled out in the QMB's charter. When this happens, the QMB goes to the ESC for resolution. The QMB provides the ESC with the proposed recommendations for action and the data to substantiate the recommendations.

# Process Action Team (PAT)

- Composed of process workers
- Develops measurement 
- Collects data
- Identifies and removes problems when authorized
- Makes recommendations to the QMB for improving the system
- Documents process analysis and actions

10/95 Team Skills and Concepts - Module 3, Viewgraph 8

## Process Action Team (PAT)

- **Composed of process workers**

While a QMB's membership is composed of those managers who own and work on the process, the PAT is composed of the subordinates who are most directly involved in a process that is within a single command function (i.e., under the span of control of one supervisor or manager). They are the process workers.

The QMB charts a PAT on an ad hoc basis when the QMB has identified a specific area or step within the process that needs investigation. Unlike the ESC and QMB, the PAT is a temporary team that comes together to look at a specific issue. The PAT's activities are directed and supported by the QMB that has responsibility for working on the process.

A PAT's membership is generally chosen by the QMB and usually numbers six to ten people. Not everyone who could contribute something worthwhile needs to be on the team. Outside experts and advisors can be brought in for consultation.

PATs are teams created to satisfy a short-term requirement to help the QMB with data collection and analysis for the establishment of process stability, process capability, and the long-term requirement of continuous process improvement.

Ideally, the QMB provides the PAT with a charter or process improvement plan, a process flowchart, a history of past process performance on some output or outcome measurement, and the process performance goal.

What the team probably will not have is information on the *causes* of variation in the outcome. Therefore, one main job of the team is to identify the causes. PAT members, by definition, are in the process, and they are in a good position to identify process impediments (sometimes regarded as "problems") in getting the job done. This can usually be done by simple observation, although some measurement may be necessary.

#### ■ **Develops measurements**

The PAT works closely with the QMB in developing measurements that will provide data to show whether the quality characteristics desired by the customer are being produced. Together, they need to figure out what they should measure and how it should be measured.

#### ■ **Collects data**

Under the guidance of the QMB, they establish clear data collection procedures. The team must not only collect enough data using these measures, but they must be sure to collect the right data—data that gives a true picture of the performance of the process.

After the team has identified and analyzed the data, it is normally their responsibility to remove, make recommendations to remove or reduce special causes of variation, and/or to report common cause variation to the QMB.

It is vital at this point to standardize the process to ensure that all employees understand the new process requirements and perform their tasks in conformance with these requirements. This is a necessary step in establishing process stability and beginning a study of process capability.

The stability of the process is dependent upon removing special cause sources of variation. Because many of these are "local" to the process itself, PATs are in a unique position to act. However, they must have the authority to act on these causes. The authority to act upon causes and impediments will have to be clarified as a part of your quality policy. Delegation of authority to act is very important for the timely control and improvement of quality. Typically, it can be given to teams under the following general condition:

If the action taken can be seen to have no negative effects beyond the boundaries outlined in the improvement plan and is thought to improve quality within the boundaries, then authority to act is granted.

- **Identifies and removes problems when authorized**

Usually, the charter from the QMB permits the people working *in* the process to reduce or eliminate local problems within certain boundaries or limits. Many problems are easy for the workers in the process to spot. The PAT is in a position to immediately and easily fix such problems as long as this is communicated to the QMB and the action does not suboptimize the process downstream.

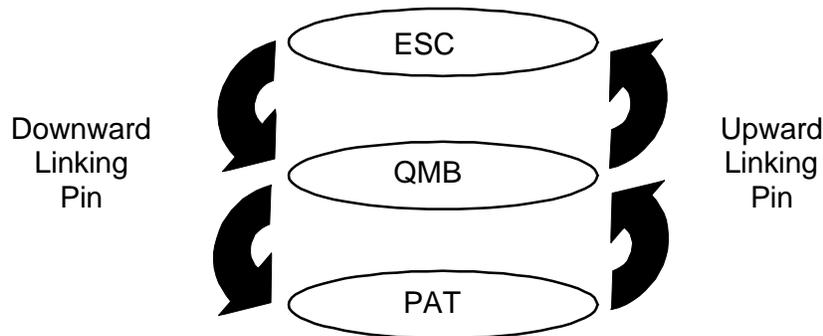
- **Makes recommendations to the QMB for improving the system**

When the local problems have been reduced or eliminated, the PAT should be able to recommend improvements in the system to the QMB.

- **Documents process analysis and actions**

As the primary data collectors, the PAT members should document the process analysis procedures and any actions taken on local problems.

## The DON Quality Improvement Team Structure



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### The DON Quality Improvement Team Structure

This viewgraph depicts the DON quality improvement team structure. The arrows indicate the links between the teams.

#### ■ Downward linking pin

The downward linking pin is the carrier of information and direction that makes clear what is expected of the team. He or she interprets the charter, helps to remove process impediments, relays requests for resource support, and identifies data collection sources. The downward linking pin should be able to attend meetings as needed. He or she is NOT the team leader and never participates in team decisions, but instead helps the team when called upon. The downward linking pin has a larger, systems view of the effort to improve the process and so must help the team avoid actions that would result in suboptimization of the system.

- **Upward linking pin**

The upward arrow represents the flow of team information back up to the chartering group. The team leader usually fulfills the primary role of upward linking pin by reporting results prescribed by the charter.

To review, the ESC is responsible for setting strategic quality policy and goals, as well as developing systems improvement. QMBs set process improvement goals, plans, and changes; while PATs are responsible for data collection and process improvement recommendations.

## The Role of Teams in the Organization

- Quality improvement teams support the quality transformation.
- Not every effort requires a team.
- Roles must be clearly defined and supported.
  - Team leader
  - Quality advisor
  - Recorder
  - Team members

10/95 Team Skills and Concepts - Module 3, Viewgraph 10

### The Role of Teams in the Organization

- **Quality improvement teams support the quality transformation.**

As we have learned, an infrastructure of quality improvement teams is a critical element for the process improvement activities leading to a quality transformation.

- **Not every effort requires a team.**

In their enthusiasm about teamwork and implementing TQL, some organizations have made the mistake of chartering a team for everything that needs attention. Remember that the process improvement team structure serves a very specific purpose and that teamwork isn't the answer for every issue that comes up. Sometimes what is needed is a policy statement or an executive or middle-management-level decision. TQL was never intended to replace the chain of command for the day-to-day supervision of work processes and workers. Recognizing when a team is not required is as important as establishing a team structure.

- **Roles must be clearly defined and supported.**

Leaders should clearly define roles and provide time and resources for the team members to perform these roles.

Key roles for teams at all levels are:

**Team leader**

**Quality advisor**

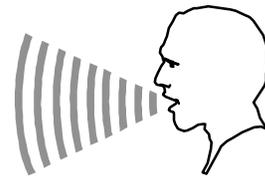
**Recorder**

**Team members**

Let's look more closely at the roles and responsibilities of each of these key players.

## Team Leader's Roles and Responsibilities

- Plans and orchestrates team activities
- Keeps team focused
- Partners/contracts with quality advisor
- Promotes teamwork
- Establishes communication channels
- Coaches and creates trust



10/95 Team Skills and Concepts - Module 3, Viewgraph 11

## Team Leader's Roles and Responsibilities

TQL emphasizes the role of leadership in the quality transformation. Essential to the success of these teams is the team leader. The team leader may be elected by the team itself, or he or she can be appointed by a higher level board. This team leader must have the skills training and knowledge required to lead the team successfully.

### ■ Plans and orchestrates team activities

The team leader plans and orchestrates the team's activities. This includes scheduling and conducting meetings, handling or assigning administrative details, and overseeing preparations for reports and presentations.

### ■ Keeps team focused

The team leader keeps the team and project focused and ensures the quality and timeliness of team outputs. The team leader reports progress and makes recommendations to the QMB or ESC as the upward link.

- **Partners/contracts with quality advisor**

The team leader is also responsible for contracting with the quality advisor and meeting before and after team meetings to ensure the success of the team.

- **Promotes teamwork**

The role of the team leader is to foster teamwork by sharing his or her knowledge of the process and allowing team members to develop and demonstrate the skills essential for process improvement.

- **Establishes communication channels**

A good team leader must be willing to listen to the team's improvement suggestions and encourage and establish communication channels between the team itself and other needed resources.

- **Coaches and creates trust**

A successful team leader optimizes the potential of each team member by coaching and creating trust among the team members.

## Quality Advisor's Roles and Responsibilities

- Acts as consultant external to the process
- Focuses on the teamwork process
- Instructs and guides team
- Develops team process and planning skills
- Partners or contracts with team leader
- Gradually lets team leader assume quality advisor functions



10/95 Team Skills and Concepts - Module 3, Viewgraph 12

### Quality Advisor's Roles and Responsibilities

- **Acts as consultant external to the process**

The quality advisor is a team consultant who is external to the process and who is specially trained in the areas of TQL methods and tools including group process, statistical and other scientific process methods, problem-solving skills, and communication. The DON recognizes that process improvement teams function more effectively when assisted by a quality advisor. The TQL coordinator, as an internal consultant at the command level, functions much like a quality advisor to the ESC. In fact, in some small commands there may be only a coordinator. The role of the quality advisor is also discussed in Chapter 3 of *The Team Handbook* on pages 3-12 through 3-14.

### ■ **Focuses on the teamwork process**

The quality advisor focuses on the process of teamwork and is concerned more with how decisions are made than *what* decisions are reached. The quality advisor ensures that the team is focused on the task and intervenes as needed when the communication process breaks down or fragments. A skilled quality advisor works as an impartial observer who ensures that all members are allowed to participate in the team process.

### ■ **Instructs and guides team**

The quality advisor instructs and guides the team in the use of TQL tools and methods, such as data collection and analysis techniques, while facilitating the team's development.

### ■ **Develops team process and planning skills**

Both the team leader and the quality advisor are responsible for developing interpersonal skills in team processes and planning. The quality advisor and team leader need to learn and practice a variety of techniques to promote effective team functioning to control digressive, difficult, or dominating participants and to encourage input from reluctant participants. We will discuss ways to deal with such behavior in the next module.

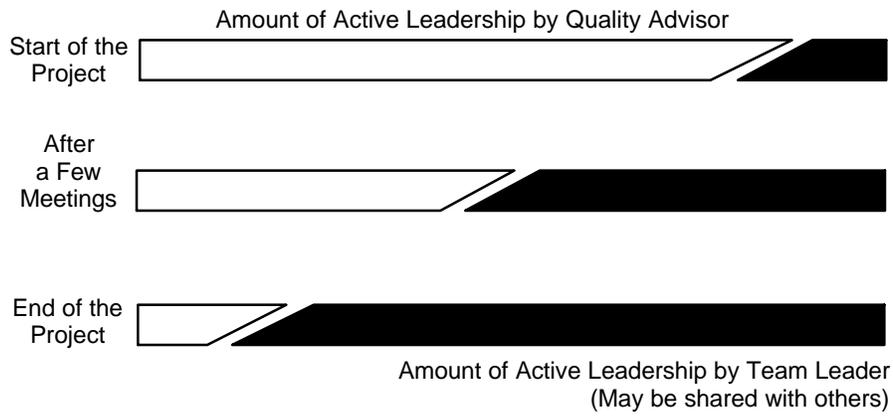
### ■ **Partners or contracts with team leader**

The quality advisor develops a working agreement or contract with the team leader and works with the team leader between meetings to discuss individual tasks, team suggestions, group process, and decisions.

- **Gradually lets team leader assume quality advisor functions**

The team leader gradually assumes the functions of the quality advisor as the team/team leader demonstrate knowledge of TQL philosophy, methods, and tools at a level adequate to continue the work of the team. The quality advisor will remain with the team until he or she, and the team itself, are sure that team success will continue. The quality advisor should remain available as a resource to the team.

## Continuum of Power-Sharing Between Team Leader and Quality Advisor



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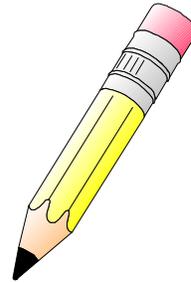
## Continuum of Power-Sharing Between Team Leader and Quality Advisor

Page 3-11 of *The Team Handbook* demonstrates how the roles of the quality advisor and the team leader change over time.

Each meeting should be attended by the quality advisor throughout the life of the team; however, this individual's role diminishes as the project proceeds. As stated earlier, the quality advisor is there to coach and assist the team in the TQL process. As the project progresses, the team leader gradually assumes these responsibilities as facilitator and coach. For long-standing teams, the team leader should eventually become comfortable in this role with the quality advisor being brought in to give assistance as needed.

## Recorder's Roles and Responsibilities

- Maintains up-to-date team records
- Coordinates administrative activities
- Helps team leader keep group focused



10/95 Team Skills and Concepts - Module 3, Viewgraph 14

### Recorder's Roles and Responsibilities

A method for keeping detailed, up-to-date records is an essential part of TQL implementation. These records provide the detailed data and information necessary for the team to keep its project focused and successful. This information is also very important to the QMBs and ESC so that support and leadership are directly linked to process improvement efforts. Also, records are important and necessary to document, measure, verify, and celebrate quality improvement.

#### ■ Maintains up-to-date team records

The team recorder maintains the team records and files in a current condition. He or she should keep a running narrative of the team's process improvement efforts, including the performance of a process, causes of past problems, improvement initiatives implemented, impact of those improvements, and resulting process performance. Clearly, the team recorder has an extremely important role in performing the various recording and roadmapping duties, especially on PATs.

- **Coordinates administrative activities**

The recorder coordinates administrative activities and provides administrative support to the team. The team recorder records and distributes minutes, assignments, members' phone numbers, and status reports. He or she prepares and distributes future agendas.

- **Helps team leader keep the group focused**

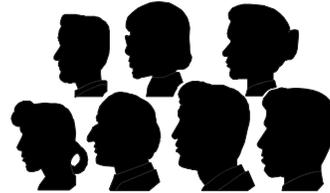
The recorder can use the team records to help the team leader keep the effort focused by clarifying decision points, action items, assignments, and the status of the effort.

It is recommended that a command implementing TQL decide on an effective, standard format for keeping team records as part of its implementation strategy. If standard formats are not provided, variation will run the entire spectrum from verbatim transcripts to a few bulletized comments. The goal of record keeping is to provide good, accessible records at minimum cost and effort. Some sample formats are provided in *The Team Handbook*.

The job of the recorder may be difficult to fill. It's a good idea to rotate this function among team members to avoid placing an undue burden on a single person.

## Team Members' Roles and Responsibilities

- Are selected for their process knowledge or ownership
- Share knowledge and expertise
- Carry out all assignments
- Understand the process
- Make teamwork part of the job
- Attend all meetings



10/95 Team Skills and Concepts - Module 3, Viewgraph 15

### Team Members' Roles and Responsibilities

By chartering teams, an organization's leaders demonstrate their commitment to quality in their organization. It follows that team members must view their assignment to a quality team as a high priority. Such an assignment becomes a part of their everyday jobs. In return for this team member commitment, leaders must empower these team members to represent their organizations and adjust workloads to make time for team participation. Team members . . .

- **Are selected for their process knowledge or ownership**

If teams are to function effectively, leaders must pay careful attention to the selection of people who will play roles on the teams. The *Implementing TQL* course and the *Senior Leader's Seminar* provide detailed guidance on the criteria for team membership. Generally speaking, PAT members are chosen for their process expertise. QMB members, representing each area of the organization affected by the process under study, are selected based on their ownership of a part of the process.

- **Share knowledge and expertise**

Team members provide subject matter expertise to identify, analyze, and implement changes for process improvement. They are expected to participate fully in the team process. They share their knowledge, experience, and ideas.

- **Carry out all assignments**

Team members perform assignments as required, and do them on time.

- **Understand the process**

Team members should also be encouraged to ask questions and to learn as much as possible about the process under study.

- **Make teamwork part of the job**

All employees need to clearly understand that teamwork and participation on process improvement initiatives are part of their job, not additional work. If you have people volunteering to be team members, capture the enthusiasm! If you have an employee who is unwilling to be a team player, try to coach him or her to participate at some point. Employees need to realize that teamwork is part of the job and not optional.

- **Attend all meetings**

Each individual on a team should make a commitment to attend every meeting. Ground rules, which we will discuss in Module 4, can help teams reinforce and meet this commitment.

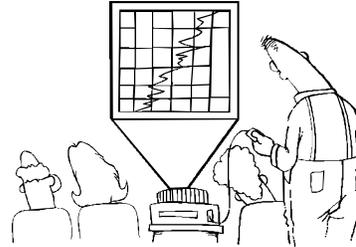
Although we discourage this practice, some organizations choose to assign alternate team members to teams. The alternate team members represent the primary members when the primary can't attend. They can also replace the primary member at planned time intervals. It is the responsibility of the alternate team members to read team documentation and keep current on what is happening on the team. If the alternate members do not stay informed, they can degrade team effectiveness.

Members should be encouraged to demonstrate commitment to completion of the team goal in the beginning and throughout the process. Changes in membership can effect team synergy. If team membership changes before the team's goals are reached, the chartering team must ensure that turnover goes as smoothly as possible by carefully selecting and training appropriate replacements.

Let's talk about what team members need to do their jobs.

# Team Training

- Training plan
  - Just-in-time
  - Refresher
- Training requirements
  - Team dynamics
  - Process improvement tools
- Training activities
  - TQL coordinators
  - Quality advisors
  - Training division staff
  - TQL library



10/95 Team Skills and Concepts - Module 3, Viewgraph 16

## Team Training

Dr. Deming's 6th point is to institute training on the job and his 13th point is to encourage education and self-improvement for everyone. In a quality environment continuous training is required.

### ■ Training plan

An organization's implementation plan should include provisions for continuous training. Such a plan should include **just-in-time** (given just before the skill is needed) and **refresher** (given to review previously taught material) training. All of the TQL courses that are being taught have been developed in a modular format. When a team reaches a particular stage in the process that requires them to exercise specific knowledge and skills, the quality advisor can go to the TQL course books and pull the applicable modules to provide the required training material.

## ■ Training requirements

This training includes **team dynamics** and **process improvement tools**, such as flowcharts, cause-and-effect diagrams, and brainstorming, which are taught in this course. Other tools, such as control charts and histograms, are taught in the *Systems Approach for Process Improvement* course. The methodology for managing process improvement can be learned step-by-step from the *Methods for Managing Quality* course.

## ■ Training activities

**TQL coordinators** typically organize training activities. They usually train the ESC and help **quality advisors** or **training division staff** prepare to teach the quality philosophy and data collection tools to other teams.

A **TQL library** created by the TQL coordinator can be very helpful to an organization. Each course in the TQL curriculum has a list of videotapes and selected readings which can form the nucleus of such a library. Materials for a TQL library can be ordered from the Aviation Supply Office (ASO). A list of material available from ASO and instructions for ordering may be found in *Charting the Course: The DON TQL Curriculum Guide*. A library will make just-in-time training easier because team members can use the books and videos to develop some familiarity with the material being covered before they meet for training.

# Charter

A written document that describes the boundaries, expected results, and resources to be used by a quality improvement team.

10/95 Team Skills and Concepts - Module 3, Viewgraph 17

## Charter

We have identified the types of people required on a team; but what about the reason for the team's existence? Your team can include the best personnel in the organization, but if they do not know the reason why they're together, it is a waste of resources. For this reason, each team needs to have a charter.

**A charter is a written document that describes the boundaries, expected results, and resources to be used by a quality improvement team.**

What are some characteristics of an effective charter?

## Characteristics of an Effective Charter

- Identifies systems or processes
- Sets boundaries and limitations
- Describes expected results
- Identifies resources
- Defines limits of authority
- Identifies team members

10/95 Team Skills and Concepts - Module 3, Viewgraph 18

### Characteristics of an Effective Charter

#### ■ Identifies systems or processes

A charter must be provided to a team before it can begin. An effective charter specifies the systems or processes that have been selected for improvement. If a charter has not been provided, the team should seek clarification of their purpose, membership, etc., from the higher level team. They should draft a charter and negotiate it with the higher level team.

#### ■ Sets boundaries and limitations

The charter should provide a clear idea of where to begin and tell the team what is and isn't in their jurisdiction. Setting boundaries and limitations will prevent the effort from growing too broad in scope.

- **Describes expected results**

The charter should also specify the results expected from the team's work, but should not do so by imposing arbitrary numerical goals. For example, an ESC might charter a QMB to "reduce cycle time," but should not demand a "five percent reduction in cycle time" without knowing if the system is capable of producing that result.

- **Identifies resources**

To demonstrate support and commitment, the chartering team should identify, as well as it can, the resources (time, personnel, money, training) that will be made available. As appropriate, the charter should also say how these resources will be provided.

- **Defines limits of authority**

The charter defines the authority the team will have to call in coworkers or outside experts, request equipment or information normally inaccessible to them, and make changes in the process.

- **Identifies team members**

The charter identifies who should be on the team. As we discussed earlier, team members should represent each area affected by the process under study.

There is no prescribed format for charters. The guidance provided here is intended to help charter teams effectively, not to create an administrative burden. An effective charter should state in a simple, clear manner what is expected of the team. This may require as many as five pages or as few as one page. Choose a design and format that meets your needs and those of your teams. The *Implementing TQL* course contains a detailed discussion of how to write a charter. Additionally, some sample charters that have been used by teams in the past are provided in the back of this Student Guide.

## Case Study

In this module, we will begin a case study that will be incorporated into the remaining modules of the course. This case study provides your team with the opportunity to experience the various stages of a team's development.

The Module 3 Charter Exercise Handout Package contains:

1. Case Study Background
2. Fleet Complaints Chart
3. Mailroom PAT Charter A (Handouts 3a, 3b, 3c)
4. Mailroom PAT Charter B (Handouts 4a, 4b, 4c)
5. Charter Exercise Instructions Part One
6. Charter Exercise Questions
7. Instructions for Observers
8. Charter Exercise Instructions Part Two
9. Charter Exercise Instructions Part Three
10. Charter Internal Mail Distribution QMB
11. Charter External Correspondence Distribution QMB



### **PART ONE - EVALUATE THE CHARTER CASE STUDY EXERCISE NOTES**

---

Remember that it is the QMB's job to manage and improve processes. PAT's are chartered by QMBs only to collect data and *assist* in process analysis.

If you don't have an effective charter, you probably won't have an effective team. You must know what is expected of your team and you must help keep the boundaries small enough so data can be collected and analyzed as a basis for improvement. But remember, there is no "official" charter and every one will be different.

Reading, discussing, and asking questions about the charter serves another purpose. It becomes a learning process for the team. You probably know a lot more now about the internal and external mail distribution process than you did before this exercise. Experience indicates that this is also true for teams in "real life" situations.

At the end of a team meeting, ask yourselves:

- What did I do to increase team effectiveness?
  
- What did I do that may have detracted from team effectiveness?
  
- What did we do well together?
  
- Not so well?
  
- How can we improve the next time?



---

**PART TWO - REWRITE THE CHARTER and PART THREE - VALIDATE THE CHARTER CASE STUDY EXERCISE NOTES**

---

Validating the team's charter is an important step in ensuring that the team clearly understands its purpose. The team leader, quality advisor, recorder, and linking play key roles in this process. Sometimes a charter must be rewritten.

This exercise emphasizes the importance of the use of a linking pin. Something that may be clear to one group of people may not have the same meaning to another team. The linking pin provides that clarification or can take it back to the chartering team for additional information.

While this exercise does bring out the practical application of charter validation, it was more important as an exercise in team dynamics. In the first portion of the exercise, you did not have a team leader or quality advisor. You may have experienced frustration because the team was floundering and there was no one taking charge, no one guiding you through the process. In the second and third part of the exercise, your team leader and quality advisor should have been able to guide the team more effectively through the exercise.

This exercise was also the first time in this course that we have asked you to formally observe the group process. You will have more opportunities to be observers for team activities. When you do, remember and learn from the experiences shared here in this exercise.

After you've received and validated a charter, what are you going to do with this document? Each team member will have his or her copy, but shouldn't there be a place where this document is readily available and/or visible?

To assist in promoting team growth and enhancing communication, we will now discuss a project planning tool known as "storyboarding."

# Storyboarding

Documents a project through descriptive pictures  
and graphs accompanied by a simple text.

10/95 Team Skills and Concepts - Module 3, Viewgraph 19

## Storyboarding

Storyboarding is a tool that can help an organization facilitate the process of quality improvement by documenting the improvement initiative through its main stages while simultaneously providing teams with a standard method to display accomplishments and improve team presentations. **That is, a storyboard documents a project through descriptive pictures and graphs accompanied by a simple text.** This technique has an interesting history.

The storyboard concept was developed in 1932 by Walt Disney Studios because Disney was dissatisfied with the inefficiency and lack of control implicit in the traditional method of making cartoons. Before storyboards were introduced, animators made up a story in a helter skelter fashion and hoped that it would hang together at the end.

Disney's first attempt to improve control was to establish a story department and to staff it with animators who had a talent for developing plot lines. Although they met frequently to discuss the project, the writers were separated from the animators in the early stages of production. This method had a flaw: the visual humor so important to the development of a good cartoon was lost. The storyboard—a series of sketches of the key moments in the action sequence that are hung up in the order of occurrence—solved the critical need to observe, critique, and improve the cartoon as it was being developed. On the surface, this seemed like a minor innovation. However, being able

to see a cartoon from start to finish prior to beginning the expensive process of animation was a significant improvement. Disney credited the storyboard technique to Webb Smith, a former newspaper cartoonist who habitually sketched out his gag sequences rather than writing them out. The uses for storyboarding multiplied and spread throughout Disney Studios. Eventually, storyboarding was the planning process used to create both Disneyland and Walt Disney World.

Many people today approach the process of quality improvement in the same helter skelter fashion as the early cartoonists. They hope that some improvement will result when they are finished. They don't use a planned, systematic approach. The lack of a systematic approach creates waste, confusion, duplication, and expense.

The Japanese have applied the storyboarding concept to their industrial quality control activities. They named the process the "Quality Control Story" and primarily used the technique for documenting and reporting improvement activities. This format displays a logical flow of data using basic graphic techniques, such as Pareto charts, cause-and-effect diagrams, and control charts.

The Florida Power and Light Company has lead quality innovation in this country for a number of years, and won the Deming Prize in 1989. Their use of storyboarding was inspired by a visit to Japan. While attending a management presentation, Florida Power and Light's team realized they were able to understand and follow the presentation even though it was in Japanese. As a result of this revelation, an eight member team was established to develop a Quality Improvement (QI) storyboard format for Florida Power and Light.

The DON has also adopted a storyboard format. Before we look at the format often used in the DON, let's talk about why it is used by process improvement teams.

# Storyboard

Process Improvement Storyboard		
Team Information	Reason for Improvement	Current Situation
Data Collection and Analysis		
Proposed Improvement and Implementation	Evaluation of Results	Future Plans

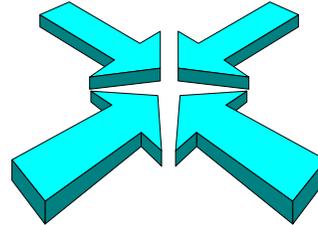
10/95 Team Skills and Concepts - Module 3, Viewgraph 20

## Storyboard

This is a blank version of the storyboard often used in the DON, In a few minutes we will see what goes into each block. First, let's talk about why we use storyboards.

# Why Use a Storyboard?

- Keeps teams focused
- Enhances communication
- Provides team recognition



10/95 Team Skills and Concepts - Module 3, Viewgraph 21

## Why Use a Storyboard?

- **Keeps teams focused**

A storyboard provides visual documentation of a process improvement initiative. It helps a team to understand the logical steps in the process improvement to track their progress through the various stages. The storyboard should be visible during team meetings for easy reference in case members forget previous agreements or simply need to be reminded where they are in the process.

- **Enhances communication**

A storyboard is an invaluable communication tool.

It provides an easily-understood vehicle for making presentations to other teams, customers, and/or other workers in the process.

It serves as a management information tool, rather than a management control tool.

It standardizes management presentations, minimizing preparation and

presentation time.

It invites input by other people.

When the team is not in session, you may want to post the storyboard in a visible place along with a pen and some sticky notes.

- **Provides team recognition**

Having the storyboard posted also provides recognition for employees involved in the process. This recognition will foster enthusiasm among other employees and encourage them to participate in this "quality movement."

The storyboarding process adopted by the DON is broken down into seven segments. When actually creating a storyboard, you can attach clear envelopes under the segment heading to hold and display the appropriate information and to allow for updating of the information. In addition, headings can be changed to fit each command's process improvement story.

# Storyboard Segments

Process Improvement Storyboard		
Team Information	Reason for Improvement	Current Situation
<ul style="list-style-type: none"> <li>• Team name</li> <li>• Team members</li> <li>• Meeting minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Charter</li> <li>• Background statement</li> </ul>	<ul style="list-style-type: none"> <li>• Process steps</li> <li>• As-is flowchart</li> <li>• Baseline measurements</li> </ul>
Data Collection and Analysis		
<ul style="list-style-type: none"> <li>• Data that identifies root causes                             <ul style="list-style-type: none"> <li>→ Cause-and-effect diagram</li> <li>→ Data collection checksheet</li> <li>→ Pareto chart</li> </ul> </li> <li>→ Histogram</li> <li>→ Scatter diagram</li> </ul>		
Proposed Improvement and Implementation	Evaluation of Results	Future Plans
<ul style="list-style-type: none"> <li>• Recommendations</li> <li>• Implementation strategies or countermeasures</li> <li>• Improved process flowchart</li> </ul>	<ul style="list-style-type: none"> <li>• Data to monitor progress                             <ul style="list-style-type: none"> <li>→ Run charts</li> <li>→ Control charts</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Recommendations for other PATs</li> <li>• Monitoring methods</li> </ul>

## 10/95 Team Skills and Concepts - Module 3, Viewgraph 22

### Storyboard Segments

#### ■ Team information

The first segment is used to:

Show the team name and members' names

Display team meeting minutes

#### ■ Reason for improvement

Normally the charter developed by the ESC or QMB tasking the team to improve a process is displayed under this second heading. Or a brief background statement about problems in the process may be shown.

## ■ **Current situation**

The third segment provides information on how the process currently operates and may include:

A bulletized list of steps in the current process

An "as-is" flowchart

Baseline measurements of quality characteristics, such as number of defects, delays, customer complaints about timeliness, or cost factors relative to the process.

## ■ **Data collection and analysis**

The fourth segment displays data that helped identify root causes of problems in the process and should include such things as:

Cause-and-effect diagram

Data collection checksheet

Pareto chart

Histogram

Scatter diagram

This information allows the team to select the root causes with the greatest impact, as verified by data. It shows all interested parties that objectivity was used in identifying potential opportunities for improvement.

## ■ Proposed improvement and implementation

The fifth segment provides a place to list recommended improvements and implementation strategies or countermeasures. It may also include "improved process" flowcharts. The goal of the team should be to develop data-based recommendations that address the root cause of the problem and improve the process, although they may just go ahead and make obvious changes that are easy to implement and have no negative consequences.

## ■ Evaluation of results

In the sixth segment, data (measurements) are displayed to monitor the progress and effectiveness of changes in the process. Data may be displayed graphically with run charts or control charts. This data shows whether or not root causes have been affected by the actions taken. If effects are favorable, then the process change should become part of the daily work and it should be institutionalized.

## ■ Future plans

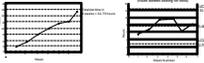
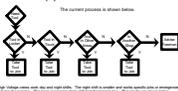
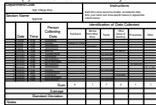
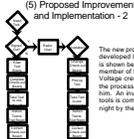
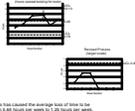
The seventh segment is used to list any future actions the team deems necessary. It might include such things as:

Recommendations for the establishment of other PATs

Methods to continuously monitor the process

Viewgraphs (3-23 through 3-32) on the following pages illustrate the process of developing a storyboard.

### Process Improvement Storyboard

<p><b>(1) Team Information</b></p> 	<p><b>(2) Reason for Improvement</b></p> <p>(2) Reason for Improvement</p> <p>The High Voltage Crew wanted to use the new quality management tool their supervisor introduced during training. They believed it would help them to avoid outages. The detailed explanation follows. When Crew #87 took this new training for special shop tasks, the tool could be used on a job, as a check, or as a reminder for the proper steps.</p> 	<p><b>(3) Current Situation</b></p> <p>(3) Current Situation</p> <p>The current process is shown below.</p>  <p>The High Voltage crew will be using the tool. The tool will be used to manage tasks when outages occur and to avoid outages. The tool will be used to manage tasks when outages occur and to avoid outages.</p> 
<p><b>(4) Data Collection and Analysis</b></p>		
<p>(4) Data Collection and Analysis - 1</p> 	<p>(4) Data Collection and Analysis - 2</p> 	
<p><b>(5) Proposed Improvement and Implementation</b></p> <p>(5) Proposed Improvement and Implementation - 1</p> <ul style="list-style-type: none"> <li>Review the current process.</li> <li>Identify the problem.</li> <li>Identify the cause.</li> <li>Identify the effect.</li> <li>Identify the solution.</li> <li>Identify the action plan.</li> <li>Identify the responsible person.</li> <li>Identify the due date.</li> <li>Identify the status.</li> <li>Identify the completion date.</li> </ul> <p>(5) Proposed Improvement and Implementation - 2</p> 	<p><b>(6) Evaluation of Results</b></p> <p>(6) Evaluation of Results</p> <p>In order to evaluate the effectiveness of the solution, the team must compare current historical data to data collected after implementation.</p> 	<p><b>(7) Future Plans</b></p> <p>(7) Future Plans</p> <ul style="list-style-type: none"> <li>Lessons learned:             <ul style="list-style-type: none"> <li>Before starting a problem, a facilitator should be available.</li> <li>A small problem is a good one to start on to learn the tool.</li> </ul> </li> <li>Remaining action:             <ul style="list-style-type: none"> <li>Continue to collect data.</li> <li>Team will now look into reducing unscheduled power outages.</li> </ul> </li> </ul>

10/95 Team Skills and Concepts - Module 3, Viewgraph 23

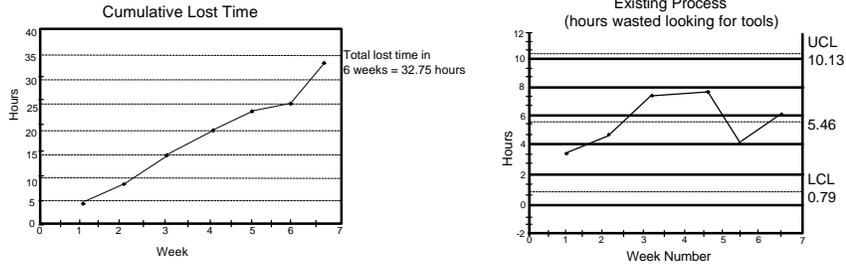
### (1) Team Information

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<p>PROBLEM AREA: <b>IMPROVE UTILIZATION OF UTILITIES</b></p>		<p>W. C. GORDAN</p>																																																																											
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<p>TEAM NAME: <b>HIGH VOLTAGE SHOP</b></p>																																																																													
<p>TEAM LEADER: <b>W. F. COLLINS JR.</b> PHONE # <b>452-2648</b></p>		<p>C. S. GORTERMAN</p>																																																																											
<p>MEETING LOCATION: <b>BLDG 45B</b> MEETING TIME: <b>1300</b></p>		<p>R. D. BRANNING</p>																																																																											
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<p>TEAM LEADER SIGNATURE: <u>W. F. Collins</u></p> <p>SUPERVISOR SIGNATURE: <u>W. F. Collins</u></p>																																																																													

10/95 Team Skills and Concepts - Module 3, Viewgraph 24

## (2) Reason for Improvement

The High Voltage Crew wanted to use the new quality management tool their supervisor obtained during training. They selected a project that all could participate in, that could be completed in a short time period, and assist them in improving the quality of their work and eliminate waste. They chose "Looking for Tools." Time was wasted looking for special shop tools. The tools could be on a job, on a truck, or not returned to the proper place.

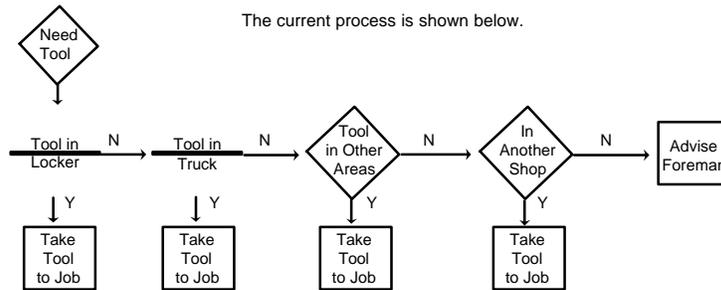


There was no consistent location for tools and no central location status. Monitoring the number of times tools had to be located during a six-week period resulted in a computed loss of 32.75 hours or 5.4 hours per week.

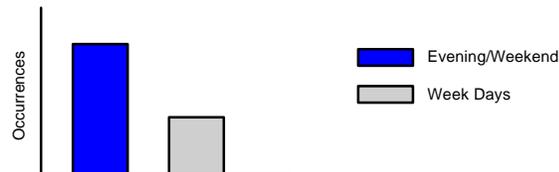
### 10/95 Team Skills and Concepts - Module 3, Viewgraph 25

## (3) Current Situation

The current process is shown below.



The High Voltage crews work day and night shifts. The night shift is smaller and works specific jobs or emergencies that occur during the evening. The team examined which shift had the biggest loss. The results are shown below.



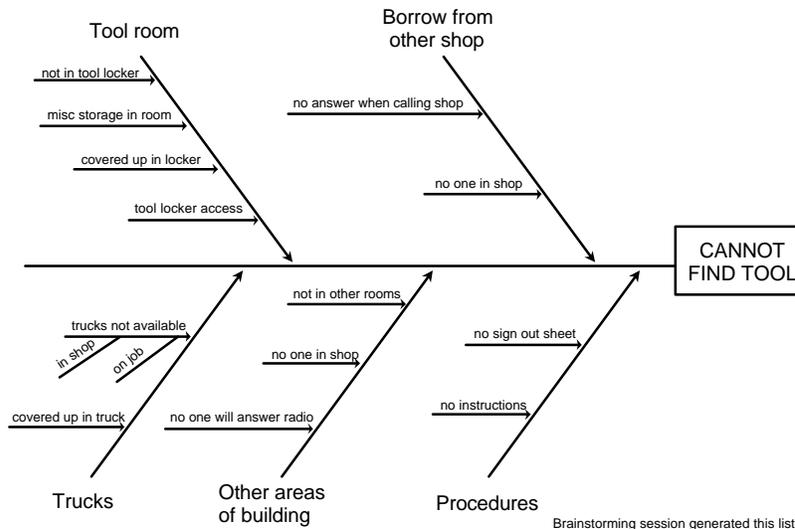
### 10/95 Team Skills and Concepts - Module 3, Viewgraph 26

## (4) Data Collection and Analysis - 1

Department/Code				Instructions					
High Voltage Shop				Each time a tool cannot be located, annotate the date, time, your name, and show specific reason in appropriate column below.					
Section Name									
Nightshift				Identification of Data Collected					
	Date	Time	Person Collecting Data	Tool Room	Borrow From Other Shop	Trucks	Other Areas of Building	Procedures	Other
1	5/2/90	0130	GORDON			not available			
2	5/4/90	0415	WHITE	covered in locker					
3	5/5/90	2330	JENNINGS		borrowed				
4	5/8/90	0215	JENNINGS			not available			
5	5/12/90	2345	WHITE				no one in		
6	5/13/90	0345	THOMPSON			not available			
7	5/13/90	0500	GORDON	covered in locker					
8	5/15/90	0115	BRANNING			not available			
9	5/16/90	0245	GONTERMAN	covered in locker					
10	5/19/90	0330	BRANNING					no sign-out	
11	5/24/90	0145	JENNINGS						all in use
12	5/25/90	0440	WHITE			not available			
13	5/26/90	0600	THOMPSON	covered in locker					
14	5/27/90	0430	GORDON				no answer		
15	5/29/90	0230	GONTERMAN			not available			
16	5/30/90	0320	BRANNING			not available			
Sum				4	1	7	2	1	1
Average									
Standard Deviation									
Notes									

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## (4) Data Collection and Analysis - 2



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## (5) Proposed Improvement and Implementation - 1

### Barrier

- Tools in different locations
- No place to store tools
- No inventory
- Different people using tools

### Action

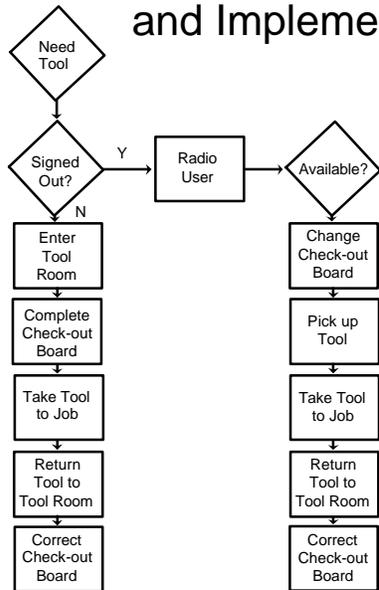
- Collect all tools
- Establish Central Tool Room
- Inventory tools
- Make check-in/out board for tools
- Inventory each night
- Inform everyone of new process

### Action Plan

WHAT	WHEN	WHO	HOW
Collect all tools	6/7/90	HVC	
Establish Central Tool Room	6/20/90	SC/HVC	MWAs to provide level floor in old storeroom and to isolate pot head.
Inventory tools	6/22/90	HVC	
Make tool check-in/out board	7/9/90	HVC	
Inventory each night		HVC	
Inform everyone of new process	7/9/90	HVC	

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## (5) Proposed Improvement and Implementation - 2

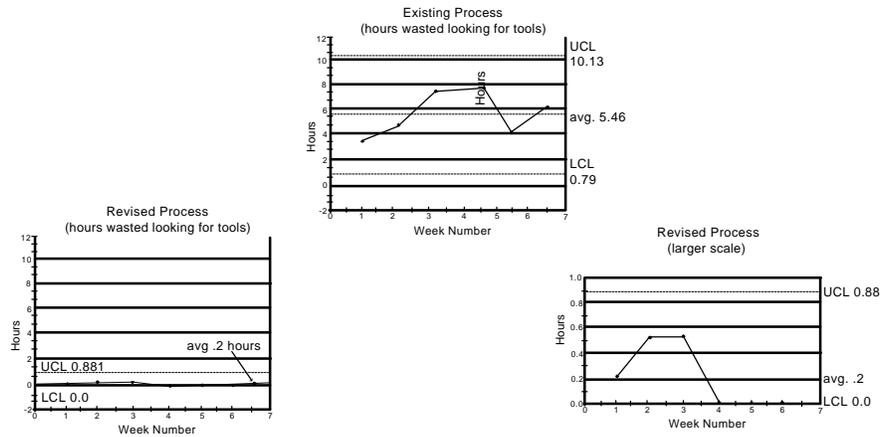


The new process developed by the team is shown below. Each member of the High Voltage crew has had the process explained to him. An inventory of the tools is completed each night by the foreman.

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## (6) Evaluation of Results

In order to evaluate the effectiveness of the solutions, the team must compare current situation data to data compiled after implementation.



New Process has caused the average loss of time to be reduced from 5.46 hours per week to .2 hours per week.

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## (7) Future Plans

- Lessons learned:
  - Before starting a problem, a facilitator should be available.
  - A small problem is a good one to start on to learn the tools.
- Remaining action:
  - Continue to collect data.
  - Team will now look into reducing unscheduled power outages.

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## Sample Storyboard

Process Improvement Storyboard Mailroom QMB		
Team Information	Reason for Improvement	Current Situation
Tom Jones, Administrative Dept. Head John Doe, Supply Dept. Head Sue Brown, Command Master Chief Jane Smith, Command Transportation Coordinator	Charter	
Data Collection and Analysis		
Proposed Improvement and Implementation	Evaluation of Results	Future Plans

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### Sample Storyboard

Now that you have a workable QMB charter for the case study exercise, add it to the Storyboard Poster we've provided.

# Summary

- The types of TQL teams
- The roles and relationships of team members
- How to charter a team
- Group process observation
- Storyboarding

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## Summary

### ■ The types of TQL teams

The DON has a structured approach consisting of an Executive Steering Committee, Quality Management Boards, and Process Action Teams. We've discussed the membership and responsibilities of each of these teams.

### ■ The roles and relationships of team members

We've discussed the roles of the team leader, quality advisor, team recorder, and team members. The team leader is a working member of the team who plans and orchestrates the team's activities. The team recorder is responsible for maintaining up-to-date team records that are necessary to document, measure, verify, and celebrate quality improvement.

Successful projects require careful selection of people to fill team roles and effectively orchestrate their activities. Team members are selected based on their subject matter expertise and role in the process. Team members must understand that this teamwork is now part of their everyday jobs, not additional work.

The quality advisor is a specially trained team consultant, external to the process, who instructs and guides the team in TQL methods and tools. He or she is more concerned with *how* than *what* decisions are made. The quality advisor and team leader work hand-in-hand to ensure team progress. The team leader gradually assumes the responsibilities of the quality advisor as the team demonstrates knowledge of TQL philosophy, methods, and tools at a level adequate to continue the work of the team. The quality advisor remains with the team until he or she and the team are sure that team success will continue and should remain available as a resource when needed.

#### ■ **How to charter a team**

We've also discussed what constitutes an effective charter. In the charter exercise, were you able to determine what the QMB wanted the PAT to do? You experienced the frustration many teams go through. They don't know what they're supposed to do, or they lack the proper support required for success. This support may include training, personnel, and/or material. An effective charter clearly identifies the process that has been selected for improvement.

#### ■ **Group process observation**

You have had your first experience here with formally observing and providing feedback on the group process. We saw how team dynamics and well-defined roles affected the performance of the teams. You also reflected back on the group process as a team member, and assessed your own performance as a team. We will build on this skill as the course progresses.

- **Storyboarding**

Finally, we've introduced storyboarding as a communications tool, which helps guide teams through the steps of an effective improvement process.

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## NOTES

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