

## **C.A.S.T. for \$ucce\$\$**

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### **The C.A.S.T. Process**

What picture comes to mind when the word “CAST” is mentioned? Well, if you are a fisherman, think of flinging out a line with a baited hook to see if you can successfully catch fish. After a while, you may need to change the bait or rigging, especially if the fish aren’t biting. Once the fish start biting, don’t you stick with the set-up until the fish stop biting? After all, why switch the process when the fish are biting? Then again, why not change the process if it isn’t catching the fish you’re after, or stops catching fish?

There may be some of you who haven’t had the pleasure of experiencing the slime and aroma of fishing. Think back to when we were children. We have all enjoyed the freedom of running around wide-open spaces, climbing trees and playing sports with the other neighborhood kids. Well, accidents happen and people get hurt. We have all experienced our share of injuries, including a few broken bones. So, how do you fix a broken bone? You put a cast on it. If successful, the bone mends even stronger than it was before. This is how our C.A.S.T. process works. You identify the broken process (whatever activity is not achieving your desired outcome), and you apply C.A.S.T. to it. Done properly, your new operating process or procedure should be stronger than the one that was previously in place (and probably broken).

C.A.S.T. is an acronym for Culturally Aligned Skills Training. This problem solving technique, developed by Visioneers LLC, is customized to your specific industry’s business activity processes. The successful application of C.A.S.T. is based on the principle that in order for your organization to achieve the desired outcome, you must fix the activity or process.

Except for bones, people aren’t broken so you can’t successfully “fix” people. Besides, when was the last time someone revised your current process? Is that person still working for you? If not, who is responsible for making sure it still works the way it was intended? Was the effectiveness of the process affected by changes in technology or society? Who knows! Does anyone care?

So why C.A.S.T.? How many of you have undergone a management directive dictating that you will get better? It doesn’t matter whether it is to increase productivity, customer satisfaction or reduce injuries. Traditionally, the increased emphasis on the problem works because the short-term fix is successful. The problem is, the increased emphasis only addresses a symptom of the problem and as a result, it is just a short-term fix. Once the attention disappears, so does the result. The organization reverts back to the way they’ve always done things and therefore, the results fall back to pre-targeted levels. Initiate enough of these short-term stopgap

measures and pretty soon, you've left a "flavor-of-the-month" taste in everyone's mouth, delicious but somehow always leave them wanting more. Worse yet, no one really tries anymore because they all know it will go away in a few months.

Another barrier to successful redesign of a business process is that, as noted above, all too often we only address the symptoms and do not solve the problem itself. This is an all-too-common traditional business approach. Organizations tend to stop short of finding the real or underlying problem and instead, settle for correcting a symptom. Of course, once a symptom is eliminated, it becomes much harder to find the source of the problem. Drive the problem deep enough underground and it will evolve into some strange new manifestation. Unfortunately, once this happens, organizations seldom make the connection between this new manifestation and the original problem. This is when the fingers start pointing and you find yourself working for a new organization.

So, you've been enlightened. Now it's time to make your first C.A.S.T. What do you do? Where do you begin? Get ready to begin a never-ending journey into the realm of organizational process evolution.

## **C.A.S.T.ing For \$ucce\$\$**

The C.A.S.T. process involves six recurring components. The first step is to:

### Identify the Problem

Correctly identifying and defining the problem is the key to any process or problem solving technique. Unfortunately, we sometimes stop short of clearly defining the problem and instead, settle for identifying only the symptoms. Remember, if we only solve symptoms, it makes it much harder to identify the real problems, which like everything that evolves, becomes some strange new "animal."

There are several problem identification techniques available and chances are your organization already uses one. Find the technique that best fits the personality of your group (organization, department, committee, etc.) and use it. If you do not currently have a preferred method, explore the different options available such as the flowchart, a fishbone, using post-it notes, or some type of cause-and-effect method.

When meeting with potential partners, we often ask to review their Loss Runs/Accident Records. We evaluate the injuries and determine what operational activity resulted in the most injuries instead of the more traditional categorizing by injury type. One of our hotel industry partners had assumed that their older populace of employee (55 and above) was incurring the majority of the injuries. Surprisingly, the data revealed that the 40 to 55 year old age group, the one with the best combination of experience, knowledge and physical ability, incurred the majority of injuries. The data further indicated that greatest percentage of injuries occurred while performing activities below waist level, and not, as assumed, by reaching and twisting.

Instead of being the problem, accidents and injuries are symptoms of an improperly functioning work process. Proper identification of the problem allows us to "see the problem as a picture" rather than trying to define it in words. The advantage of envisioning a problem is that

an activity may just be one portion of the work process and the problem may not be in the same area where the symptoms are occurring.

Once the problem has been properly identified (clearly defined as to why it is a problem) it is crucial that the goal or objective is clearly defined. We prefer the S.M.A.R.T. goal to ensure that the objective has been clearly defined.

Specific – Measurable – Achievable – Realistic – Timely

Using this acronym ensures that all aspects of a well-written goal are clearly understood by everyone involved.

A quick footnote here, we believe that the majority of all stated goals are attainable given enough time. The most common mistake people make is not allowing enough time to achieve their specifically defined and measurable goal.

Once you have clearly identified the problem, the next step is to:

### Brainstorm Potential Solutions

This is one of those activities that are often easier said than done. The two most common obstacles to brainstorming are:

- 1) Dismissing a suggestion before it can be properly evaluated, and
- 2) Participants not speaking out to avoid being ridiculed or patronized (see #1).

So, how do you get past these obstacles? At this stage, it is very important to let ideas flow. In our experience, the most effective brainstorming sessions utilize a facilitator who is unbiased with no preconceived notions. Remember, the facilitator is there to help the session move along, not to impart his or her opinions. In fact, the most successful facilitators never reveal their opinions on the best direction to proceed.

We favor the technique of using Post-It notes. It allows all participants to propose suggestions without the threat of dismissal or ridicule. Just be sure that only one idea or thought is written per post-it note sheet. This technique eliminates the need to allow a set amount of time quota for the brainstorming session. When an individual has run out of ideas, they will simply put down their pens and stop writing. This also eliminates the logistical nightmare of not having an available dry erase board or flipchart. Any wall can serve as a “working board.”

This technique was successful in reinvigorating one professional organization’s Safety Committee. Key members were asked to participate in suggesting possible directions for the committee. Based on these suggestions, S.M.A.R.T. goals were developed. Each member was then asked to spearhead a subcommittee to accomplish the goal. Not surprisingly, each member chose their own suggestion to “champion.” This created individual commitment based on each member’s personal area of interest and / or expertise.

Now that you have a whole list of potential paradigm-changing ideas and solutions, as a group, you must:

## Choose and Develop

When selecting your best option, please do not limit yourself to one solution alone. In fact, make a special effort to discuss the positives of each idea. (Notice, we only included the positive aspects, not the negative ones.) By focusing only on the positives, even more opportunities may be discovered. It is at this step that you will end up choosing the best idea or combination of ideas. New paradigms, or accepted models of truth, are discovered because pioneers with Vision, after considering all possibilities, continually create the opportunities to discover new realities. On the other hand, you will not be able to realize the potential of each idea if you focus on why it won't work.

There are several questions that will have to be addressed at this stage.

- How do we do what we do?
- Why do we do what we do?
- What is the desired outcome or product of what we do?

What you may find is that some of the operating parameters or expectations have dramatically changed due to technology and/or societal attitudes. So why didn't someone notice it before? Because the dramatic change is the culmination of many subtle changes which have occurred over time. Therefore, if many of the original factors have changed, your work process must also change in order to work effectively and efficiently.

An editorial note: The "people factor" of process change is seldom given full consideration. Consider this: During our parents' generation, employees were loyal to their employer and did what was asked without questions, especially if you wanted to keep your job. In the current generation, individuals are loyal to people and question everything (or at least almost everything). If what the individual is doing not perceived as important or satisfying, they will probably move on to somewhere else. A company was on the fast track in their industry. They hired some of the best talent available. There were different opinions on what motivated their individuals to succeed. Soon after achieving industry-wide, statewide, and national recognition, many employees left for other opportunities. The general consensus among the executive staff was that these individuals all left for a more secure financial situation. In reality, money was not the main issue, but became an issue when other needs were not addressed. Some left for lateral positions. Frustration set in because of the perception that time was not invested to clearly communicate the employees' roles and their positive contribution to the company's success.

After selecting the best option (or combination of options) create a visual chart of your goals, and the actions necessary to attain each goal. Create a step-by-step activity schedule. We recommend starting at the finishing line and scheduling backwards. This technique allows you to discover your "drop-dead" dates. Use this to evaluate the progress you are making and don't be afraid to revise as necessary. Factors or situations are discovered that weren't originally taken into consideration. However, do not continually revise schedules just because you will not make the deadline. Be honest. Are you committed to attaining your defined goal or are you just along for the ride?

At this point, it is very important that you engage employee involvement, especially if you hadn't yet done so. Remember, your organization has a talent pool of on-the-job, front-line

experts. Trust your employees. Utilize your employees. After all, if you don't trust, or can't utilize your employees, why do you still have them on your payroll? Newly created, or recently re-engineered work activity processes have the greatest chance for long-term success if those who will be held responsible and accountable for its success develop them. Put yourself in their place. Personally, would you rather support a new process developed by you or your peers, or a process developed by your corporate office that dictates you will make it work, no matter how inefficient it is?

During a meeting with one of our partners in the hospitality industry, the management team expressed a concern regarding how to reduce the number of injuries. They tried various incentive programs but none of them seem to work. Their most recent program was to put up a chart of all the departments so all the employees could see how many days they could proceed into a business quarter without experiencing an injury. Once an injury was recorded, the offending department had a "frowning" face put up on their chart. The management team could not figure out why multiple injuries would occur soon after the first recorded injury of the quarter. The question was asked why and the issue discussed. The team concluded that the employees' efforts resulted in only negative recognition. The discussions centered around how to positively recognize the injury-free efforts of the employees. The solution? Instead of counting injuries with a "frowning" face, a "**smiling**" face was posted for every day completed without an injury. The result? More departments achieved their incentive rewards each quarter.

We mentioned responsibility and accountability. Remember that accountability not only means being responsible when things go wrong, it means being recognized and appreciated when things go well. No one can be held responsible or accountable if the expectations are not clearly defined and **written!** If it is not written (or documented), it never happened. Too many bad things can happen when you assume. The point is, never assume that everyone thinks the same way you do because they probably don't.

So now, you've identified the problem, clearly stated your goals, brainstormed potential solutions, and chosen and developed the best idea or combination of ideas. Now we proceed to the next stage:

### Implementation

Implementation. Creating, then making, something happen. This can be a very scary step, especially when creating a new process. Take comfort in the thought that every journey begins with the first step. In other words, you won't get close to achieving your stated goal if you do nothing. Besides, what's the worst thing that can happen? Your final process does not work as well as you originally anticipated. So what?! Just apply the C.A.S.T. process again and refine your efforts. After all, have you ever experienced a 100% bad idea? Our guess is probably not because you can usually find one positive thing in every change initiative effort. Use this success to continue your journey toward more success.

The actions required during the Implementation phase are very similar to the Choose and Develop phase.

- ✓ Document your implementation plan.
- ✓ Develop a checklist or timetable.
- ✓ Schedule backwards.

- ✓ Periodically review your progress.
- ✓ Adjust or revise as necessary.

And, by all means, make sure your employees are involved in planning the implementation process to ensure their commitment. One trick that we have learned is to utilize the knowledge and experience of your toughest staff critic. You can sometimes secure their commitment by phrasing one simple question.

*“Listen, Stanley. I can think of a thousand reasons why it won’t work. What I need you to help me with is to come up with one reason why it will work!”*

Once Stanley comes up with at least one reason, you have secured his commitment. Better yet, if Stanley is an unofficial leader of your workforce, then he lights the fire under the other employees.

So your new or revised work process has been implemented. Now what? Time to:

### Evaluate!

For some reason, this is the step that many organizations never get to, yet it is the step that significantly determines the success of your efforts and provides the stepping-stone to your next successful effort. As part of your Implementation process, you should have established a deadline for implementation of your new or revised process. Also as part of your Implementation schedule, you must schedule a review to evaluate the effectiveness of your new process. The following questions should be addressed during the Evaluation phase.

- Did we achieve our goal?
- Did the revised process achieve the desired result?
- What worked?
- What do we need to revise, improve or adjust?
- Did we experience any unexpected benefits?
- What were the unforeseen factors?

There was a group of employees at a local construction company who determined that a more effective process was necessary to effectively schedule the activities for their construction project. They decided to form a committee to create a more effective process to prepare for upcoming project activities. They created a flexible “Pre-Activity” checklist for each project staff to use as a planning tool. The checklist was designed so that there were several options for completing the form, including check-off boxes, blank lines and numbers. After an introductory period of three months, what they found was that this newly created 3-page form was so confusing, nobody was sure if they were using it correctly, and therefore they didn’t use the form. The committee reconvened. After reviewing the data obtained, they revised the checklist to a one-page, free form document to be used as a guide. Each project was allowed to use the form based on their needs. Some used it for activity preparation, some used it to track materials, some used it for training, and a few used it to develop activity work plans. Regardless of how each project decided to use the checklist, they all used the checklist.

Complete a final evaluation report and share the successes with the entire group, and if applicable, the entire workforce. Always remember to:

### Celebrate the Successes!

Remember, success breeds success. People want to be recognized for their successes. Consider the consequences. If you don't recognize them for their positive efforts, they will get you to recognize their negative performances. Think of it like raising or training children. They all want the attention and they will get your attention. The question is, will they get your attention for doing something good or something bad? People never really grow old. At heart, we are all just big children looking to be recognized for being successful.

Remember organizational process improvement is a journey. Never fall into the trap of thinking that your successful efforts allow you to arrive at a destination. Improvement never stops and therefore, you and your organization can never stop improving. The minute you stop moving forward, the minute you are satisfied with reaching your destination, you will begin to fall behind the competition. Once you begin this journey of mastering change and process improvement, it is a journey you undertake for life, at work and in your personal life.