

Kaizen and Create

Achieving a vision often relies on process. That doesn't sound 'sexy', but it is true. Processes are a way to move from point A to point B in the most effective manner. They can govern and define everything, from securing a client a new mortgage, to scheduling catch-ups before a remortgage is due, or to how to hire a team. Processes ensure successful businesses continually move in the right direction.



Kaizen

Kaizen means improvement, continuous improvement involving everyone in the organization from top management, to managers then to supervisors, and to workers. In Japan, the concept of Kaizen is so deeply engrained in the minds of both managers and workers that they often do not even realize they are thinking Kaizen as a customer-driven strategy for improvement. This philosophy assumes "our way of life – be it our working life, our social life or our home life – deserves to be constantly improved".

The Kaizen Institute defines Kaizen as the Japanese term for continuous improvement. It is using common sense and is both a rigorous, scientific method using statistical quality control and an adaptive framework of organizational values and beliefs that keeps workers and management focused on zero defects. It is a philosophy of never being satisfied with what was accomplished last week or last year.

The message of the Kaizen philosophy is that not one single day should go by in the firm without some type of improvement being made. Kaizen is everyone's job; it requires a problem-solving mindset and involves people from different departments working together in teams to solve problems where possible.

Kaizen Principles



Kaizen deals with the management of change and is a methodology in the right direction to improve, on a continual and incremental basis following the right steps.

- Establish a plan to change whatever needs to be improved
- Carry out changes on a small scale
- Observe the results
- Evaluate the results and the process and determine what has been learned

As a salesperson you want to be the most effective, most successful professional you can be. This is not achieved through training alone, but rather through adopting a Kaizen mindset and working through the steps above to refine your techniques based on both success and failure, as well as changing processes you perform when this is required (again the improvement of your sales process should be your top priority).

The three pillars of kaizen are summarized as follows, these areas can be focused on to lead positive change within a business:

1. Housekeeping
2. Waste elimination
3. Standardization

Kaizen Principle 1.



Housekeeping

The 5S process should be used to create efficiencies with housekeeping. It may sound basic and in some cases common sense, but the guidance within 5S exists because even large, successful companies often overlook such simple and easy ‘tweaks’ to improve productivity.

Sort what is not needed. Use a ‘red tag system’ of tagging items considered not needed, then give everyone involved a chance to indicate if the items really are needed. Any red tagged item for which no one identifies a need for can be removed *eg: Paperwork, desk clutter, out of date handouts etc*

Straighten what must be kept. Make things visible. Apply the saying "a place for everything, and everything a place" *eg: A drawer for client letter templates, a stationery cupboard etc*

Scrub - everything that remains. Clean to provide a pleasing appearance.

Spread the clean/check routine. When others see the improvements in the Kaizen area, give them the training and the time to improve their work area.

Standardisation and self-discipline. Established a cleaning schedule. Use downtime to clean and straighten area, then repeat, repeat, repeat

Kaizen Principle 2.



Waste Elimination

As Kaizen was developed to focus primarily on manufacturing processes, some of the waste elimination focuses are not applicable. However, many have value as eliminating wasted time/ effort is the easiest step to improving sales performance as you effectively free up time to sell.

Overproduction – Production more than production schedule – *Are you taking leads beyond your capability to effectively sell/ package? Is there too much on your plate?*

Defects – Labour is wasted if the work isn't of the correct standard – *Are you and your Admin checking for errors periodically and following guidance you receive on observed errors to eliminate them?*

Motion – Having to seek out the equipment you need – *Do you and your Admin have the tools to do your job at hand?*

Processing – Reliance on 'run' times from other areas – *Do you factor into your workflow the SLAs of other businesses?*

Kaizen Principle 3.



Standardisation

Standards are set by management, our network, the FCA or other regulatory bodies but they must be able to change when the environment changes.

Companies can achieve dramatic improvement when they review standards periodically, collecting and analysing data on errors, and encouraging teams to conduct problem-solving activities.

Create is no different. Founded by brokers who wished to change the established process and improve upon it, that philosophy continues. When you identify efficiencies that can be made, changes to processes, or completely new ways of working...speak out! Share your ideas so we can test this new way of working.

Kaizen 'workflow' sheet

Date	Problem and Root Cause	Current Countermeasure	Proposed 'Fix'	Who?	When?	Status