FREE IMPROVEMENT GUIDE | CONTINUOUS IMPROVEMENT

# Getting better, one step at a time

Stop fixing the same problems twice. A two-hour guide for owners, and for anyone with the authority to change how the business works.

Choose one problem, find out why it really happens, test one change for a month, and keep it if it works. Then do the next one.


1 What keeps going wrong
2 The one thing holding you back
3 See how the work really happens
4 Find the real cause
5 Three questions first
6 Test it small
7 Make it stick
8 A review that changes things
9 Bringing the team with you
10 This month I will


For owners, and people with the authority to change how the business runs, in service businesses of £500K to £10M turnover. Use it on your own, or with the people who do the work.

BEFORE YOU START

# How this guide works

**Most businesses are already good at fixing problems.** The trouble is that they fix the same ones every few months, usually on a Friday afternoon, by whoever happens to notice.

This guide helps you stop fixing things twice. You choose one problem, find out why it really happens, test one change for a month and keep it if it works. Then you do the next one. Ten short chapters, about two hours in all, and at the end your problem and its fix on one page.

> **On your own or with your team?** You can do it alone, but chapters 3 and 4 work far better with the people who do the work. They know where it goes wrong; they have usually just never been asked.

| | Chapter | What you end up with | Time |
|---|---|---|---|
| 1 | What keeps going wrong, and what it costs | A month's list of what went wrong, counted | 15 min |
| 2 | The one thing holding the business back | The problem to fix first | 10 min |
| 3 | See how the work really happens | One example followed from start to finish | 20 min |
| 4 | Find the real cause | The causes, checked | 20 min |
| 5 | Three questions before you change anything | What you want, how you will know, what you will try | 10 min |
| 6 | Test it small: one change, one month | A test with dates and something to count | 10 min |
| 7 | Make it stick | The new way, written down and part of the routine | 10 min |
| 8 | A monthly review that changes things | Thirty minutes a month in the diary | 10 min |
| 9 | Bringing the team with you | What each person needs for the change to last | 10 min |
| 10 | This month I will | One problem, one change, written down | 5 min |

## What you need

A rough memory of what went wrong last month, an hour with one or two of the people who do the work, and somewhere to keep a list. The boxes fill in on screen.

### SHORT ON TIME? THE 20-MINUTE VERSION

1. Write down the problem that came back most often last month.
2. Find one time it did not happen, and what was different.
3. Choose one change, and one thing you will count.
4. Try it on a few pieces of work for a month.
5. Book thirty minutes to decide: keep it, change it or drop it.

BEFORE YOU START

# Which of these sounds familiar?

Tick the ones that sound like you. They tell you which chapters to spend longest on.

| The problem | Chapters | Tick |
|---|---|---|
| The same mistakes keep happening, however often they are fixed | 1, 4 | ☐ |
| A fix works for a few weeks, then everyone drifts back | 7 | ☐ |
| Problems only get fixed when the owner spots them | 1, 9 | ☐ |
| The team is always firefighting, so nothing gets better | 1, 2 | ☐ |
| Reviews happen, but nothing changes afterwards | 8 | ☐ |
| Everyone has a theory about the cause, and nobody has checked | 3, 4 | ☐ |
| A big change was tried once, and it made things worse | 5, 6 | ☐ |
| People do it their own way, and some ways are better | 3, 9 | ☐ |

## The business you will meet along the way

A

### An accountancy practice

About 20 people, preparing accounts and tax returns for small businesses and their owners

Fees have been flat for a couple of years and margins are slipping. Two experienced managers have left, and more of the work is fixed-fee compliance, where every hour spent chasing is an hour nobody pays for. Every winter, year-end accounts jobs run late. The partners put it down to clients. "That's just clients," as one of them says.

The practice is an illustration, not a real client. You will see what it found, and what it changed, in each chapter.

CHAPTER 1 OF 10

# What keeps going wrong, and what it costs

A problem that happens once gets fixed. A problem that happens every week gets a nickname, and after a while becomes part of the furniture.

For one month, keep a short list. Each time something goes wrong, has to be redone, has to be chased or sits waiting for someone, write one line: what happened. Do not try to solve anything yet. If a month feels too long, start the list from memory today and keep adding to it.

At the end of the month, count how often each kind of problem happened, and note roughly what it costs: hours, money, or a client's patience.

> **Count before you choose.** Memory is a poor counter. It remembers the dramatic problem from March and forgets the dull one that happens every Tuesday. A simple tally for a month, which the quality books call a check sheet, settles the argument.

The practice's list filled up quickly. By some distance, the most common line was a year-end job waiting for an answer from a client.

YOUR TURN: YOUR LIST

| | What went wrong | How often this month | What it costs |
|---|---|---|---|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |

CHAPTER 2 OF 10

# The one thing holding the business back

Not every problem deserves your attention first. One usually holds up the rest.

Eliyahu Goldratt, a physicist who turned his attention to factories, made a simple observation in his business novel *The Goal*: in any process, one step limits how much the whole thing can do. An hour saved anywhere else changes very little. An hour saved at that step is an hour gained by the whole business.

So the problem to fix first is not the loudest one, or the one that annoyed you this morning. It is the one where work piles up and waits. Three questions find it:

1. Where does work sit waiting, longer than anywhere else?
2. Who, or what, is everyone waiting for?
3. If this one thing were fixed, what else would get easier?

> **If everyone is waiting for you,** that is your answer. It is a common one in growing businesses, and the practice card *The one thing holding the business back* goes further.

Looking at its list, the practice saw that jobs spent longer in the pile marked "waiting for the client" than at any other point. Every other step was quicker than that one.

YOUR TURN

Where work waits longest

Who or what everyone waits for

The one problem we will fix first

Why this one, and what would get easier

CHAPTER 3 OF 10

# See how the work really happens

There is the way a process is meant to work, the way people say it works, and the way it actually works. Only the third is any use to you.

Take one recent example of the problem and follow it from start to finish. Better still, sit with the person doing the work and watch. Toyota's managers call this going to see for yourself, and it is the first step on the one-page problem sheet they use, which you will fill in at the end of this guide.

Write each step as it actually happened: what was done, who did it, and whether it waited. Then mark each step:

| | |
|---|---|
| Keep | It works. Leave it alone. |
| Fix | This is where the work goes wrong, waits or comes back. |
| Add | Something is missing. Note it for later. |

> **Watch, do not interview.** Asked to describe a process, people describe the one they believe in. Watching one real piece of work is quicker, and it is the only way to see the waiting, which nobody thinks of as a step.

The practice followed one late job. Questions went to the client more than once, as each person found something new: the junior when starting, the senior when preparing, the manager at review. Each time, the file was put down until the answer came, then picked up again by someone who had to remind themselves where they were.

YOUR TURN: ONE EXAMPLE, STEP BY STEP

| | What happened | Who | Did it wait? How long? | Keep, fix or add |
|---|---|---|---|---|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |

# Find the real cause

The first explanation for a problem is rarely the whole story, so check it before you act on it.

1. **Say what happens, with no solution in it.** "Year-end jobs wait weeks for client answers" is a problem. "We need a client portal" is a solution wearing a problem's coat, and it stops anyone looking further.
2. **Look at the good examples.** Find a few times the problem did not happen. What was different about them? This is often the quickest route to the cause, and the most persuasive, because it happened in your own business.
3. **Ask why, more than once.** Then ask why that happens. When an answer splits in two, follow both.

> **Expect more than one cause.** Asking "why" five times is a well-known method, and the NHS suggests it for simple problems. A review in the journal *BMJ Quality and Safety* pointed out its limits: one chain of whys leads to one cause, when real problems usually have several, and two people asking the same whys often reach different answers. So ask why, but ask it of more than one person, and treat the answers as things to check rather than conclusions.

If you get stuck, sort the possible causes under four headings (people, process, systems and clients) and see which heading fills up.

The partners said clients were slow. The good examples said otherwise. The jobs that ran on time were the ones where someone checked the records first and sent every question at once. The clients were much the same. The way the practice asked them was different.

YOUR TURN

The problem, said plainly, with no solution in it

When it does not happen, and what is different

The causes we found, and how we checked them

CHAPTER 5 OF 10

# Three questions before you change anything

Ideas for fixing things are easy to come by. These three questions make sure you can tell whether one has worked.

Before you change anything, answer three questions. They come from the Model for Improvement, developed by Gerald Langley and colleagues and widely used in health services, including the NHS.

| | | |
|---|---|---|
| 1 | **What are we trying to achieve?** | Specific, and by when. "Fewer late jobs" is a wish. "Year-end jobs go back to the client once, from this January" is something you can check. |
| 2 | **How will we know a change is an improvement?** | One thing you can count, before and after. |
| 3 | **What one change will we try?** | One. If you change three things at once and it works, you will not know which one did it. |

> **Why the second question matters.** Without it, every change looks as though it worked to the person who suggested it.

The practice wanted year-end jobs that went back to the client once, not several times. It would count how many times each job went back, and how long it waited. The change: before work starts, a senior does a short first check of the records and sends the client one complete list of questions, with a date for a reply.

YOUR TURN

What we are trying to achieve, and by when

How we will know: the one thing we will count

The one change we will try

# Test it small: one change, one month

Try the change on a small scale first: a few pieces of work, one team, one kind of client, for one month. Then look at what happened and decide. This four-part cycle is known as Plan, Do, Study, Act, and it goes back to the quality pioneers Walter Shewhart and W. Edwards Deming.

| | |
|---|---|
| **Plan** | What you will change, on which pieces of work, who will do it, for how long, and what you will count |
| **Do** | Run it. Note anything that surprises you, while you still remember it |
| **Study** | Compare what happened with before, or with the work that was not in the test |
| **Act** | Keep it, change it and test again, or drop it |

> **Dropping a change is a result.** A small test that shows an idea does not work has saved you rolling it out to everyone. Write down what you learned, and try the next idea on your list.

Small tests also make change easier to agree to. "Can we try this on ten jobs for a month?" is a much easier question to say yes to than "From Monday, everyone will..."

The practice tested the first check on ten year-end jobs in one month, and compared them with the rest. The ten went back to the client less often and were finished sooner, so it kept the change.

### YOUR TURN: YOUR TEST

The change

On which pieces of work, and who

Start and end dates

What we will count

What happened

Keep it, change it, or drop it, and why

CHAPTER 7 OF 10

# Make it stick

Most fixes do not fail. They fade. Three months later everyone is doing it the old way, and nobody can remember deciding to.

Two things stop a fix from fading.

## Write the new way down

On one page: the steps, who does each one, and what good looks like. Keep it with the work, not in a folder nobody opens. If someone new joined next month, could they follow it? The practice card *How we do things here* goes further.

## Attach it to something that already happens

James Clear, who writes about habits, suggests tying a new habit to an existing one: "after I do this, I will do that". In a business the same idea works on processes. Put the new step inside a moment that happens anyway, such as opening a job, sending an invoice or a weekly meeting, so nobody has to remember it.

> **Make the right way the easy way.** A step built into the job set-up gets done. A memo asking people to remember it gets read once.

The practice wrote the first check into the steps for opening a year-end job, so the job cannot be started until the check is done and the list has gone.

YOUR TURN

The new way, in one sentence

Where it is written down

Who owns it

What it is attached to: "When ..., we ..."

CHAPTER 8 OF 10

# A monthly review that changes things

A review only earns its thirty minutes if something is different afterwards.

Thirty minutes a month, same day, same people. Start with four questions, adapted from the after-action review the US Army uses after every exercise:

1. What did we mean to happen?
2. What actually happened?
3. Why was there a difference?
4. What will we do differently?

Then three checks. Is the change we kept still being used? What does this month's list of problems show? Which problem do we take on next?

> **End with a decision.** A review that ends without one is a pleasant chat. Close each one with one thing someone will do, and by when.

Keep the review about the work, not about who got it wrong. People stop telling you about problems the first time telling you gets them into trouble, and then the list goes quiet for all the wrong reasons.

The practice holds its review on the first Monday of the month. The first check is the first item each time, and the next problem comes from the list.

YOUR TURN

Date of the first review (put it in the diary now)

Who is in it

Where the list of problems lives

# Bringing the team with you

The people who do the work usually know why it goes wrong. Ask them, and let them help design the fix.

A change designed by the owner and announced to the team tends to last until the first busy fortnight. One the team helped design lasts longer: a well-known study in 1948 found that factory workers who helped plan a change accepted it faster than those who were simply told.

Each person needs five things before a new way of working sticks, in this order:

| | Each person needs | What it looks like | What you do |
|---|---|---|---|
| 1 | **To see why** | They know what the problem costs them, not only the business | Share what chapters 1 and 3 found |
| 2 | **To want to take part** | They helped find the cause | Do chapters 3 and 4 with them |
| 3 | **To know how** | One page, shown on a real piece of work | Walk through the new way together |
| 4 | **To be able to do it** | It works when they try it | Test it on their own work, with help |
| 5 | **To keep doing it** | It is part of the month | The monthly review; notice when it works |

> **You go first.** If the new way applies to your own work, use it before you ask anyone else to. People watch what the owner does far more closely than what the owner says.

At the practice, the seniors had always raised questions in their own way. They helped design the list and tested it on their own jobs, so the new way was partly theirs from the start.

YOUR TURN

| Person | Which of the five is missing? | What I will do |
|---|---|---|
| | | |
| | | |
| | | |

The five needs follow Jeffrey Hiatt's ADKAR model (awareness, desire, knowledge, ability, reinforcement), widely used in managing change. The guide *How you win work* has a fuller chapter on bringing a team with you.

CHAPTER 10 OF 10

# This month I will

You have done the thinking. This page turns it into something that happens.

One problem, one change, one test, this month. Written down, with a date, and somebody else who knows about it.

YOUR TURN

The problem I am taking on

The change I will test

On which work, and for how long

How I will know it has worked

Who else needs to know

The date we decide: keep, change or drop

**Then put it on one page.** The next page is your problem on a page, ready to fill in from chapters 1 to 7. The page after it shows the practice's, filled in. Bring yours to the monthly review, and start a new one for the next problem.

Getting better is not a programme with a launch date and a logo. It is one problem, properly fixed, and then the next one. Do that every month and in a year there are twelve problems that no longer happen, and nobody had to print a single poster.

THE PAGE TO KEEP

# Your problem on a page

The problem

Owner

Started

## 1. The problem and what it costs

From chapters 1 and 2

## 2. How it happens now

From chapter 3

## 3. The real cause

From chapter 4

## 4. The three questions

What we want, how we will know, what we will try

## 5. The test and what happened

From chapter 6

## 6. The new way, kept

Where it is written down, and what it is attached to

AN EXAMPLE

# The practice's problem on a page

**The problem:** the queries that go round and round. **Owner:** the partner responsible for year-end work.

### 1. The problem and what it costs

Year-end accounts jobs run late every winter. The most common line on the month's list was a job waiting for a client's answer.

Cost: staff hours spent picking files up again, and margin on fixed-fee work.

### 2. How it happens now

Questions go to the client more than once, as each person finds something new: junior, then senior, then manager.

Each time, the file is put down until the answer comes.

### 3. The real cause

Not slow clients. The jobs that ran on time were the ones where someone checked the records first and sent every question at once.

No single point where all the questions are gathered.

### 4. The three questions

**Achieve:** jobs go back to the client once, from this January.

**Know:** count how often each job goes back, and how long it waits.

**Try:** a senior's first check, then one complete list of questions with a reply date.

### 5. The test and what happened

Ten year-end jobs, one month, compared with the rest.

The ten went back to the client less often and were finished sooner. Kept.

### 6. The new way, kept

Written into the steps for opening a year-end job: no work starts until the check is done and the list has gone.

First item at the monthly review.

An illustration, not a real client. Yours will look different, and it should.

AT THE BACK

# Where these ideas come from

Everything in this guide rests on published research or well-tested practice. You do not need any of it to use the guide, but if you would like to read further, these are the places to start.

| | |
|---|---|
| **Counting before you choose** | Kaoru Ishikawa, Guide to Quality Control, 1968 (the check sheet); NHS Institute for Innovation and Improvement, The Handbook of Quality and Service Improvement Tools, 2010 |
| **The one thing holding you back** | Eliyahu Goldratt and Jeff Cox, The Goal, 1984 (fourth revised edition, 2014) |
| **Going to see, and the problem on a page** | Durward Sobek and Cindy Jimmerson, "A3 Reports: Tool for Organizational Transformation", 2006 |
| **Saying the problem plainly** | Thomas Wedell-Wedellsborg, "Are You Solving the Right Problems?", Harvard Business Review, 2017 |
| **The limits of asking why** | Alan Card, "The problem with '5 whys'", BMJ Quality and Safety, 2017; NHS England, Quality, Service Improvement and Redesign tools |
| **The three questions** | Gerald Langley and others, The Improvement Guide, second edition, 2009 (the Model for Improvement) |
| **Testing small** | W. Edwards Deming, Out of the Crisis, 1986, and Walter Shewhart (Plan, Do, Study, Act) |
| **Attaching the new way** | James Clear, Atomic Habits, 2018 |
| **The monthly review** | US Army, A Leader's Guide to After-Action Reviews, 1993 |
| **Involving people in a change** | Lester Coch and John French, "Overcoming Resistance to Change", Human Relations, 1948 |
| **The five needs** | Jeffrey Hiatt, ADKAR: A Model for Change in Business, Government and Our Community, Prosci, 2006 |

## Going further

Each chapter has a practice card that goes deeper, used in coaching: *The one thing holding the business back* (chapter 2), *Finding the real cause, and fixing it for good* (chapter 4), *One improvement a month* (chapter 6), *How we do things here* (chapter 7) and *Reviews that change things* (chapter 8).

WANT A SECOND PAIR OF EYES?

# Bring the problem that keeps coming back to a free call

Forty-five minutes on Zoom, with your problem on a page or the problem you have fixed three times already. We spend the time on your business, not on what I sell. If working together would help, I will say so once, at the end, and you are free to say no.

SMARTer Entrepreneurs helps owners of service businesses, £500K to £10M turnover, build a business that achieves what they want it to.

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