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HELGI TOMASSON . ARTISTIC DIRECTOR

Welcome to the FPN/HRN webinar. We will be getting started shortly.

# Lean Ops at San Francisco Ballet:
## An Interview with Kim Ondreck Carim, CFO

# What is Lean Ops?

# What is Lean Ops?

Lean Ops is the maniacal pursuit of the elimination of waste from every process with the ultimate goal of providing world-class quality, delivery, and service to the customer at the lowest possible cost.
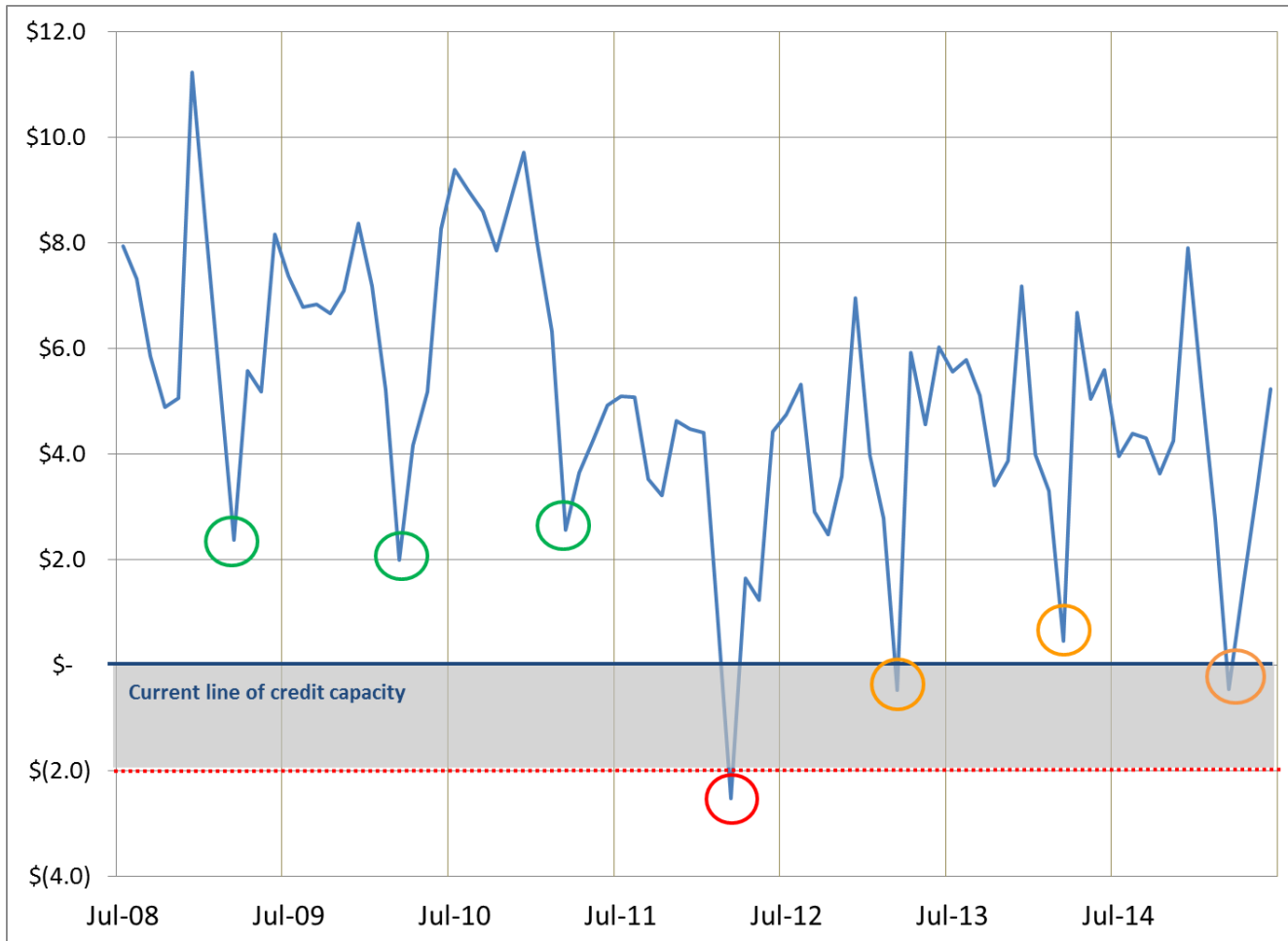
# Doing more with more

Process Improvements

Increased Bandwidth

More Impact
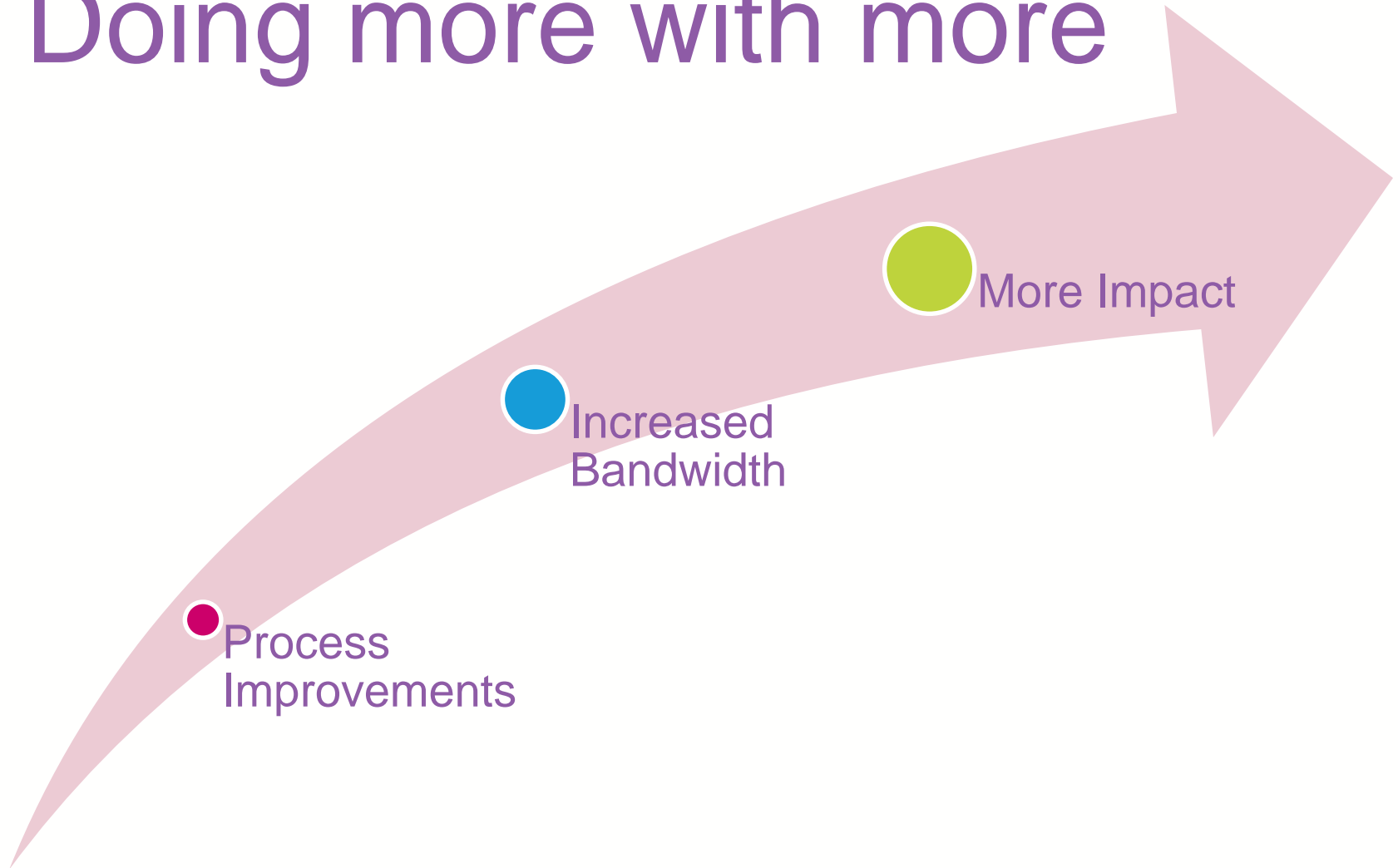
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What was the impetus for bringing it to San Francisco Ballet?

# Cash Flow Trends

# Strategic Alignment

1. Strengthens the organization's ability to execute by selecting only a vital few breakthrough objectives that will have a significant impact on the bottom line

2. Ensures the organization is aligned to support mission, vision, values, and to achieve breakthrough objectives

3. Builds lasting management buy-in and teamwork across the institution to foster a long-term commitment to organizational transformation, and increased flexibility

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How is it positioned in the organization?

Can you walk us through the 4-part vision for lean ops at SF Ballet?

# Lean Ops Vision



**1. The work that every one of us does is adding value somehow to the organization, in support of the Ballet's mission, at every step along the way.**

➢ *We eliminate time-wasters (the things that are non-value adding) as much as possible in our work processes.*

# Lean Ops Vision



**2. We use our critical thinking and creative abilities where they will have the most impact.**

➢ *We complete our mundane tasks as simply and efficiently as possible, with few errors and less re-work. This allows us to undertake our more complex processes thoughtfully and carefully. We have resources and documentation to support the staff in these areas.*

# Lean Ops Vision



## 3. All staff members are engaged with Lean Ops.

➤ Staff understand Lean Ops and participate in Lean Ops efforts. Lean Ops becomes a habit, not something that takes effort. Staff are empowered to initiate positive change.

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# Lean Ops Vision



**4. With everyone thinking lean in large and small ways, <u>over time</u> we will reach our savings goal of $2 million.**

- ➤ We'll know what Process Improvement Events to hold for bigger wins.
- ➤ We'll waste less time re-inventing the wheel or fixing mistakes.
- ➤ We'll be using our time only on adding value to the organization and its constituents

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Please walk us through the Photo Approval Process Improvement as a way for us to learn how this works.

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# Photo Approval Process Improvement

# Project Team

Photo Approvals Process Improvement



Erik Almlie

Murray Bognovitz

Esther del Rosario

Caroline Giese

Katelyn Harris

Kyra Jablonsky

Lauren White

Kim Carim, Facilitator

# Priorities for Process Improvements

"Kaizen" = change ("kai") for good ("zen")

| Process Step Type | Priority for Review | Required Action |
|---|---|---|
| Unnecessary non-value add | 1 | Eliminate |
| Necessary non-value add | 2 | Reduce |
| Value adding | 3 | Optimize |

# Process Improvement Agenda

1. Agree on Objectives and Propose Metrics
2. Agree on Scope of Process: Start and End
3. Define "Customers" and Value-Added Expectations
4. Map Current State
5. Brainstorm Improvements
6. Map Ideal Future State
7. Assess Gaps
8. Create Action Plan and New Process Metrics

# Process Improvement Objectives

- Reduce the time it takes to obtain photo approvals (cycle time and lead time)
- Eliminate/minimize non-value-add activity, specifically waiting time
- Improve quality of images in the process
- Reduce/simplify the # of interactions
- Reduce personality-based exceptions
- Metrics
  - Volume (# of images supplied)
  - Number of exceptions
  - Cycle time (amount of actual work)
  - Lead time (cycle time plus queue time)
- Standardized work for photo approvals

# Scope for Process

Start:  Official AGMA or student images shot

End:  Final approved images tagged in Fotoware as approved.

Out of Scope:

| Plan for shots needed | Photo shoots scheduled | Images shot | Photos organized, tagged and ready to use | Event photos |

# Photo Approval Customers

And their expectations for added value from the process

| Customers | Expected Value Add |
|-----------|-------------------|
| Erik Almlie | Pre-selection of good images; basic color correction; photographer approves image for use |
| Dancers | Initial thoughtful and critical review by Artistic; especially for shots they are in but do not approve (3 or more dancers) |
| Media/Press | Timely images (ASAP); images represent current state of events on stage; quality; variety; needs addressed quickly |
| Marketing Department/ Advertising | Newest images are approved ASAP; images meet size/layout needs; speed of approvals; wide variety to choose from (not piecemeal approvals) |
| Helgi and Patrick | Quality images; brand representation; accurate depictions; easy access to approvals library; pre-selection for ease of approval |
| Choreographers | Input on how ballet is represented in images |
| Social Media (Carly and Katelyn) | New images; very old images (deep archives); images all the time; images as fast as possible |
| Development, Board, Volunteers | Available images approved in a timely manner |

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# Current State

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# Process Mapping = Flowchart

# Current Process Map



Photo Approval – Current Process

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# Start…

# End.

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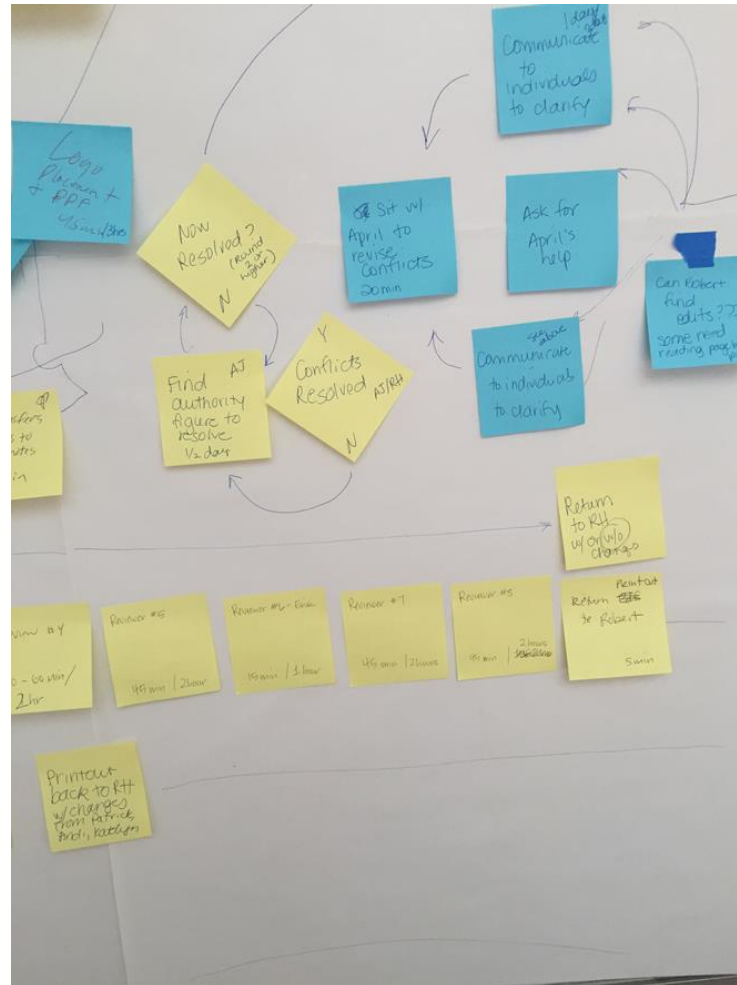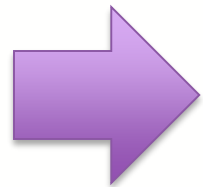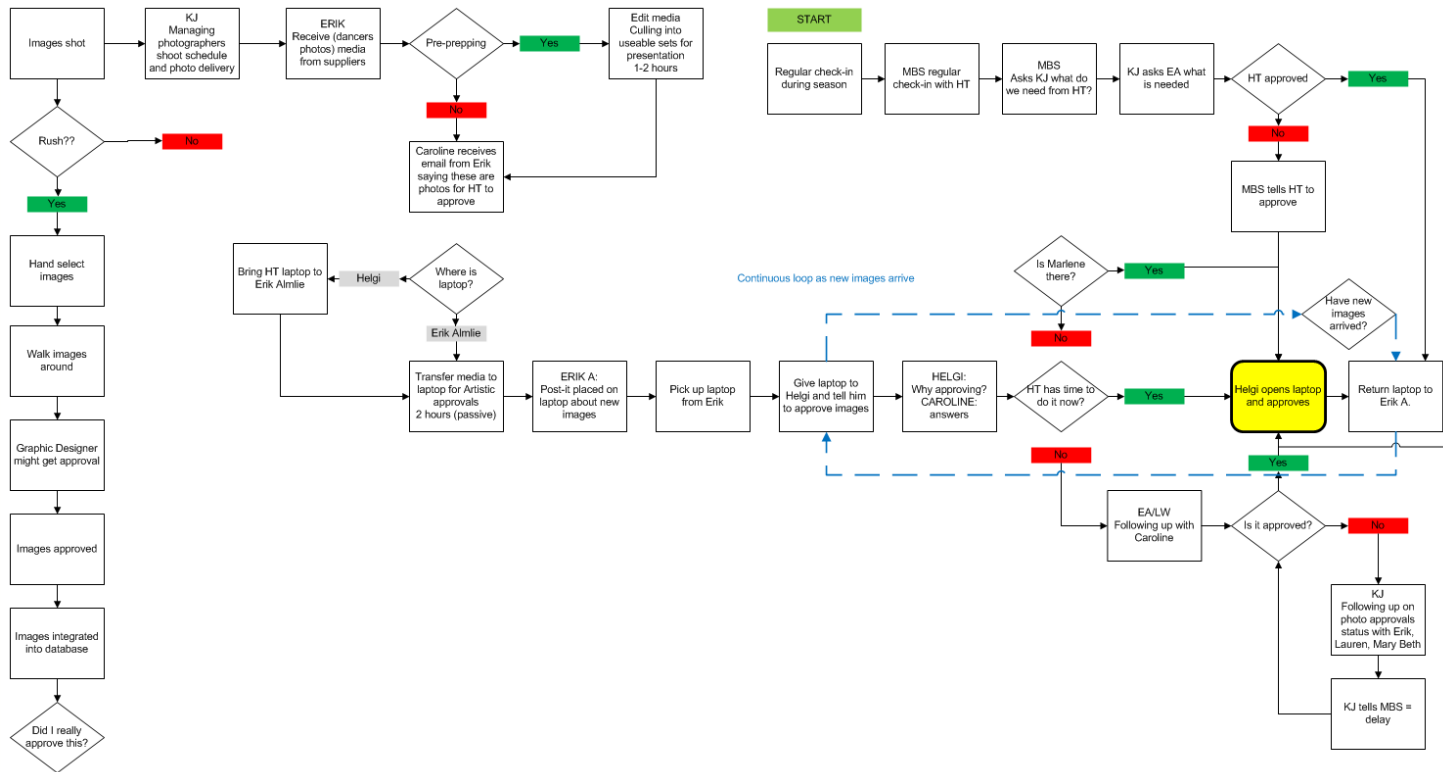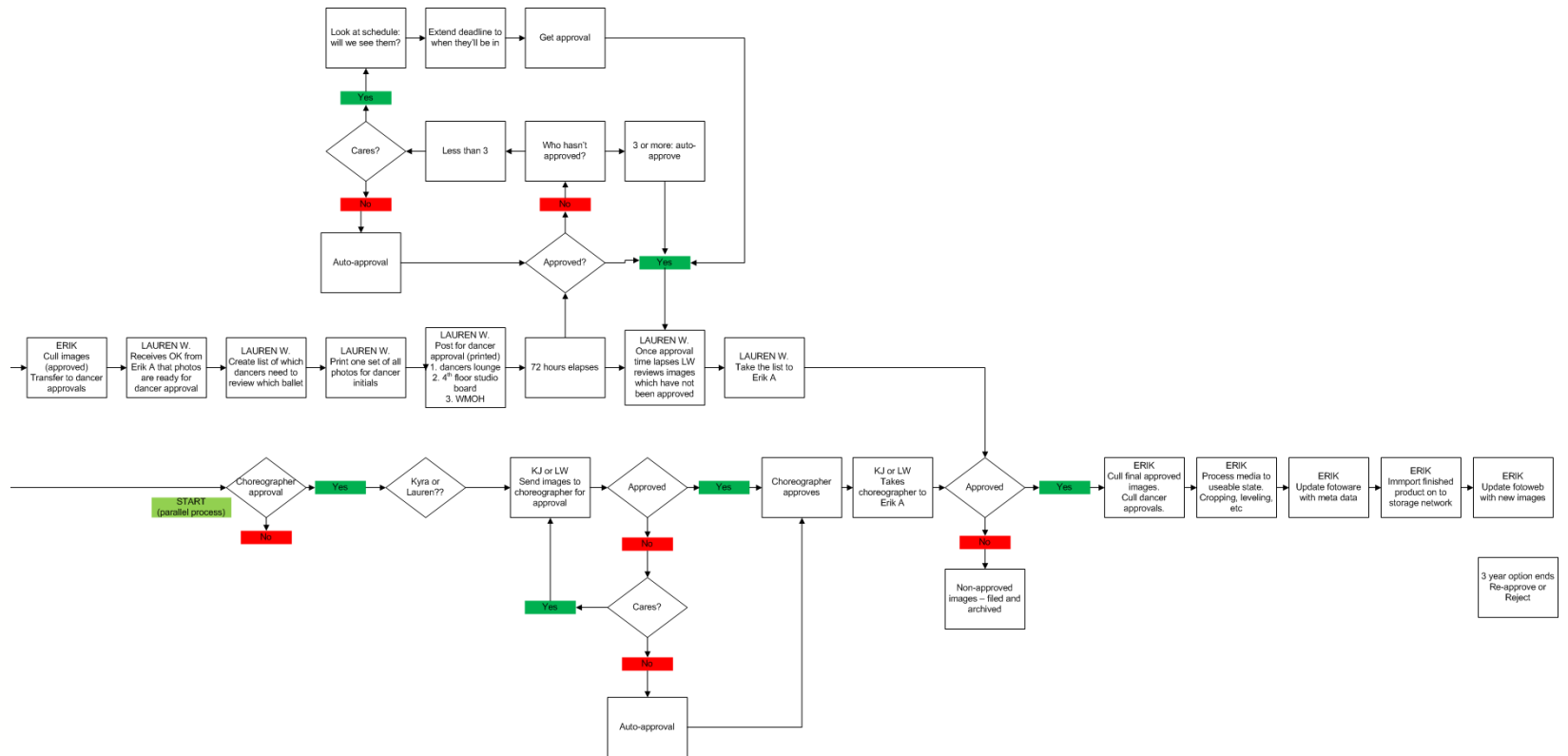
# Calculating Cycle and Lead Times

The team at work:

# Improvement Brainstorm
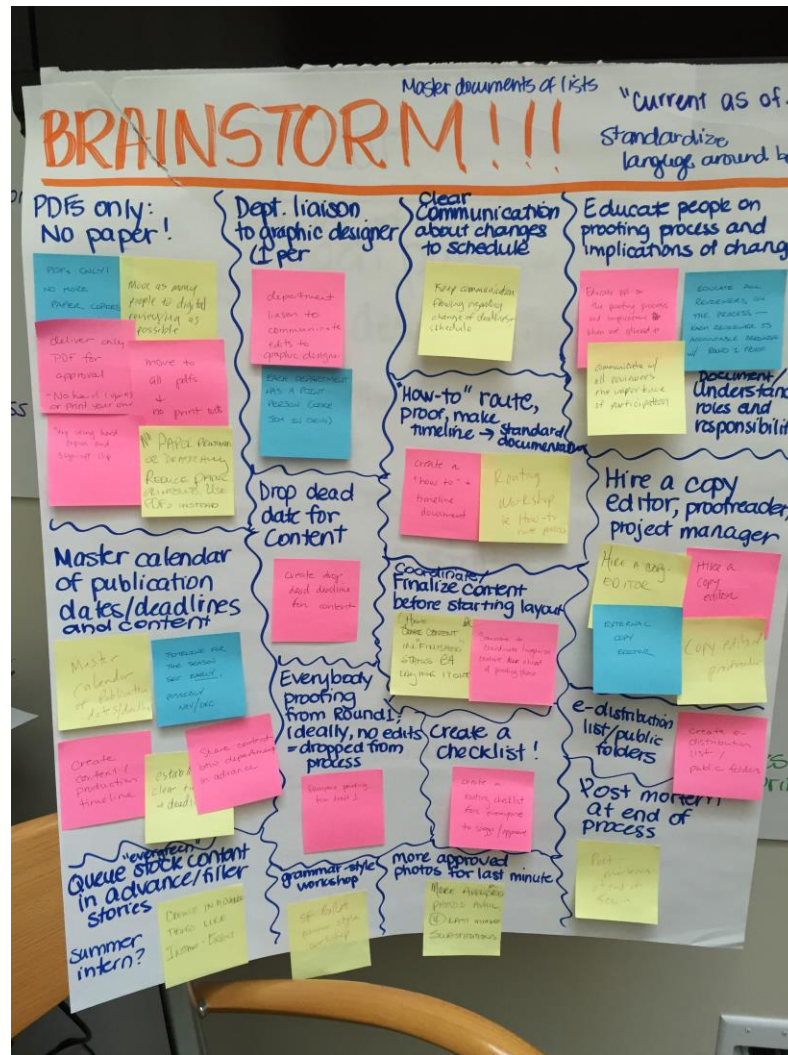
# Brainstorm Ideas for Improvement

## Purchase and Implement Fotoware Enterprise

Reduce # of people involved

No exceptions to Dancer 72-hour approval window

Choreographers must approve photos before leaving the building

Photographers reduce the number of images supplied

Assign and train archive power users in each department that uses images

Understanding of sense of urgency by approvers

Direct access to images to be approved via network (i.e., no laptop)

Photo approval station outside the 4th floor studios

No paper approvals

Plan for appropriate and required marketing imagery in advance

# Keys to the Future State

Results of the Gap Analysis

- Reduce the volume of images entering the process
- Document and enforce clear and reasonable expectations for approval turn-around times
- Make it physically easier to approve the photos
- Reduce the number of people ensuring images are moving through the process

# Future State Process Map



Photo Approval – Future State

# Ideal State Process Map
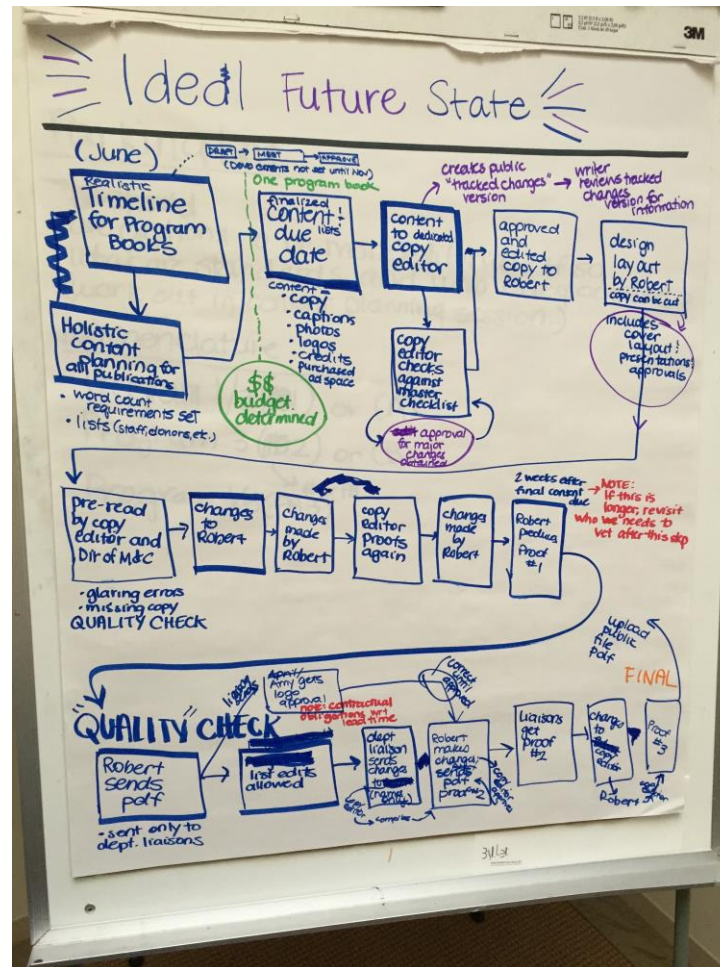
# Key Action Items

- Create technical specifications for images that photographers must ensure all images meet before turning them over to SFB (Erik A./Kyra)
- Establish a procedure for obtaining Choreographer opt-in to photo approvals and for scheduling an approval session prior to departure (Caroline)
- Schedule approval session for Artistic Director at least once every two weeks for an hour, involving Marlene when possible (Caroline)
- Calendar two week periods for Artistic approvals and communicate between the departments when deadline is approaching; images not reviewed will be considered approved after a review cycle has expired (Erik A. and Caroline)
- Strict adherence to Dancer 72-hour approval window (Lauren/Kyra)
- Supply images to be approved on a networked computer for Artistic Director and Associate Director of the School, eliminating the need to pass a laptop back and forth (Murray)
- Create a photo improvement station outside 4th Floor studios
- Purchase, implement and train on Fotoware Enterprise (Murray)

# Key Metrics

To be measured now and as action items are accomplished:

- Number of photos received from photographers
  - Goal: Decrease # by 50% from current state
- Numbers of photos received from photographers not meeting technical requirements
  - Goal: Decrease to zero
- Number of photos not reviewed by Artistic/Artistic Director within two week window
  - Goal: Decrease to zero
- Number of exceptions made to dancer 72-hour approval period
  - Goal: No exceptions
- Number of choreographer approvals required after departure
  - Goal: Decrease to zero

# Measures of Improvement

From Current to Ideal Future State

| | Current | Ideal Future | Improvement | % Improvement |
|---|---|---|---|---|
| Cycle Time | 17-23 hours (2-3 days) + 72 hours | 8-10 hours + 72 hours | 9-13 hours | 52% to 55% |
| Lead Time | 44-49 working days (2+ months) | 13-17 working days | 31-32 days | 65% to 72% |
| # of People in Process | 6 | 4 | 2 | 33% |

# The "Weekly 15"

Continuous Improvement Initiative

# SharePoint Home Page

# Celebrations of Staff

## Celebrating Continuous Improvement: Celina Mercer

📅 8/20/2015 7:34 AM   👤 Jennifer French Kovacevich

This week's spotlight is on Wellness Program Manager Celina Mercer, who wrote in her notes for the Task due 7/27/15:

> "Ordering an MRI requires completing lots of small steps. To minimize any room for error, I spent my 15 minutes writing out a brief checklist of all the information and steps I need to obtain or complete whenever I need to schedule an MRI. I made it concise and small enough to hang by my phone for easy access!

> This is important for me now because I am new. However, referring to this quick checklist each time I do this will ensure I am consistently correct and reduce the chances of me making a careless errors."

Though relatively new to the Ballet and the Lean Ops/Continuous Process Improvement initiative, Celina has really embraced the concepts and jumped right into process documentation. As she told me, "I'm a meticulous note-taker as is, but knowing the company was really involved in Lean Ops encouraged me to do more. I'm not just taking notes for myself now, I'm writing them down so I could have them for anyone else who might have to do this work."

Being a newcomer to her position, she has no shortage of ideas of processes to document. "As I learn things, I create instructions, create lists." She has a binder of such documents started by her predecessor, Michelle Zimmerman, and she continually revises them. "My checklists aren't static, that's the big thing, too." And she keeps a running list of Lean Ops ideas to do, especially for while the dancers are off on tour and she can focus on bigger projects. "There's always something I can think of that could be leaner."

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# "Weekly 15"

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Overall, what has the SF Ballet gained so far by implementing Lean Ops?

And, what do you anticipate from it in the next 2-3 years?

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What would be your advice to other leaders about how best to implement Lean Ops?

Can you share something you would do differently with the benefit of hindsight?

# Your Questions and Reflections