Kaizen & Intake: The Toyota Partnership

Introductions

- Ilenia Sanchez Bryson, Esq.-Chief Information Officer for Legal Services of Greater Miami, Inc.
- Kristen Lentz, Esq. -Managing Attorney for Disability Rights Florida Gainesville Regional Office
- Amy Burns, Esq. –Deputy Director of Florida Rural Legal Services, Inc.
- Melanie Barker, Esq.-Managing Attorney of the Intake and Advice Line, TIG Project Manager, and current acting Managing Attorney for the Fort Pierce Office of Florida Rural Legal Services, Inc.

Origins of the Toyota Partnership

- Florida Access to Justice Commission Subcommittee on the Delivery of Legal Services
  - Identify ways to improve access to courts and legal services by low and moderate-income Floridians
  - Studied Business Process Analysis (BPA) and its use in other states
  - Recommended BPA as a mechanism for increasing client access to legal services, maximizing the scarce resources available to legal aid organizations and improve processes to benefit the client and the advocates.
- Florida Bar Foundation
  - ATJ recommendations and opportunities for corporate pro bono   partnerships
  - Google = Toyota!
  - Florida Rural Legal Services TIG Grant Project

Overview

WHAT IS BUSINESS PROCESS ANALYSIS

Definition

- **Business Process Analysis** is a methodology for the **analysis** of a **business** with a view to understanding the **processes** and improving the **efficiency** and effectiveness of its operations.

- Process Improvement Methodologies
  - Lean
  - Six Sigma
  - Toyota Production System
  - Total Quality Management

Methodologies

- Six Sigma: This method helps companies measure defects or inconsistencies in a process to deliver perfect products and services.
- Lean: This method strives to cut costs by eliminating waste.
  - Lean Six Sigma combines both methods to reduce defects and improve efficiency.
- Total Quality Management: Customer centered methodology
- Toyota Production System: Developed by Toyota Motor Corporation to provide best quality, lowest cost, and shortest lead time through the elimination of waste

Florida Rural Legal Services

THE TOYOTA PRODUCTION SYSTEM

Kaizen or "Change for the Better"

Business Process Analysis the Toyota Production System Way

- "The Toyota Production System (TPS) was established based on two concepts:
  - The first is called "jidoka" (which can be loosely translated as "automation with a human touch") which means that when a problem occurs, the equipment stops immediately, preventing defective products from being produced;
  - The second is the concept of "Just-in-Time," in which each process produces only what is needed by the next process in a continuous flow."
    (Taken from: http://www.toyota-global.com/company/vision_philosophy/toyota_production_system/)

Problems are Good

➢ Look at them as opportunities for improvement

➢ "No one has more trouble than the person who claims to have no trouble."

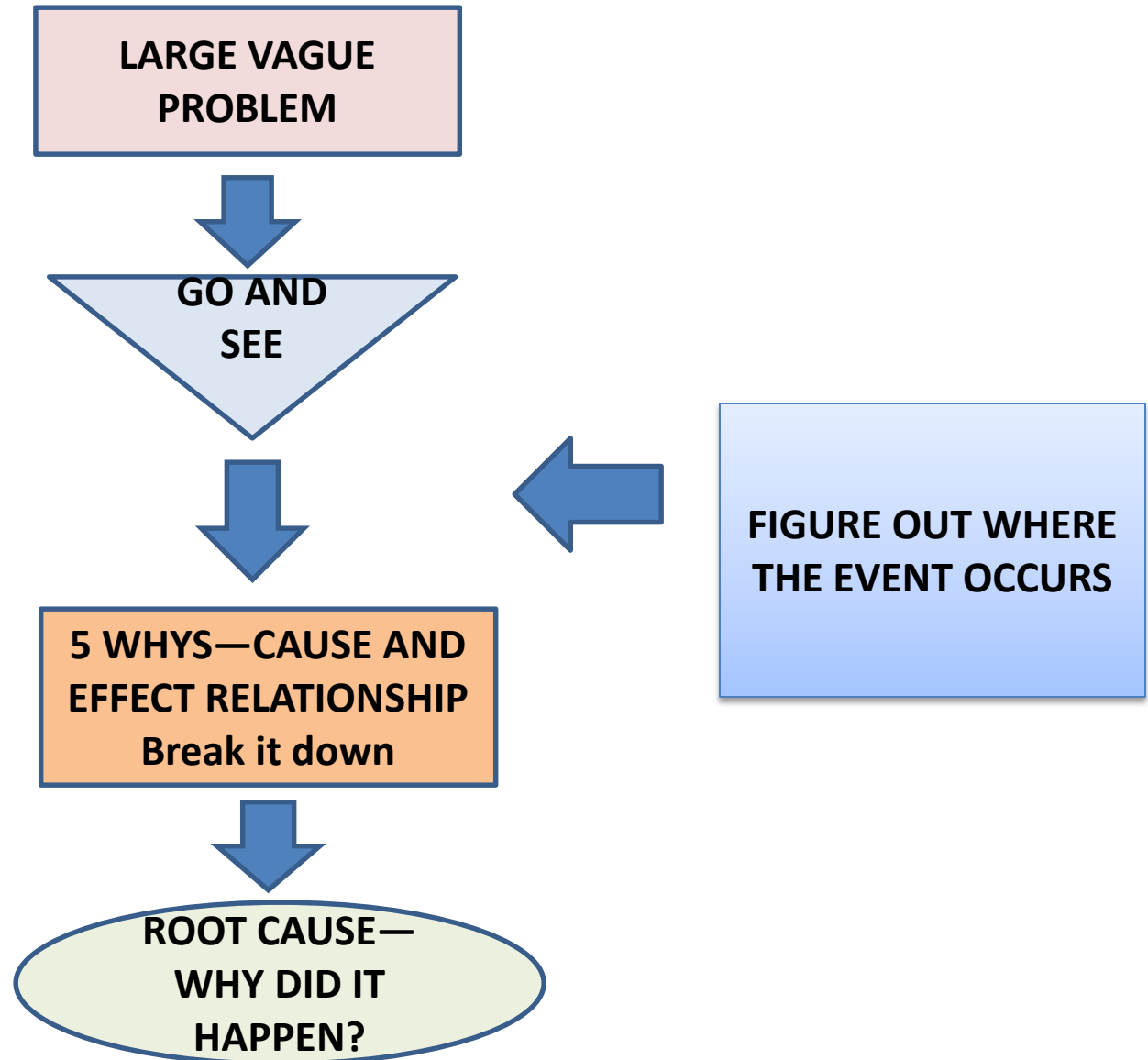➢ (Having no problems is the biggest problem of all) Taiichi Ohno

"Houston, we have a problem..."

From Apollo 13 (1995)

You know you have a problem but the reality is all you know is that something isn't right........(LARGE VAGUE PROBLEM)

Practical Problem Solving

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┌─────────────────────┐
│   LARGE VAGUE        │
│     PROBLEM          │
└─────────────────────┘
          │
          ▼
        GO AND
         SEE
          │
          ▼
┌─────────────────────┐          ┌─────────────────────┐
│ 5 WHYS—CAUSE AND    │ ◄─────── │ FIGURE OUT WHERE    │
│ EFFECT RELATIONSHIP │          │ THE EVENT OCCURS    │
│ Break it down       │          └─────────────────────┘
└─────────────────────┘
          │
          ▼
     ROOT CAUSE—
     WHY DID IT
      HAPPEN?
```

8 Step Problem Solving Method

1. Clarify the Problem
2. Break down the Problem (Honestly the hardest part of the process)
3. Set a Target
4. Analyze the Root Cause
5. Develop Countermeasures
6. See Countermeasures Through
7. Evaluate both Results and Processes
8. Standardize Successful Processes

Figuring out what is going on now

- We have a problem: Now What?

Need to figure out what the initial condition is:

➢ Observations on site an absolute must
➢ Input from the staff working is extremely valuable
➢ The "Shop Floor" is where all of your value added activities take place and needs to be the focus of your organization.

Shop Floor Focus

- Observations on site an absolute must
- Input from the staff working is extremely valuable
- The "Shop Floor" is where all of your value added activities take place and needs to be the focus of your organization.
- Shop Floor is where problems become visible
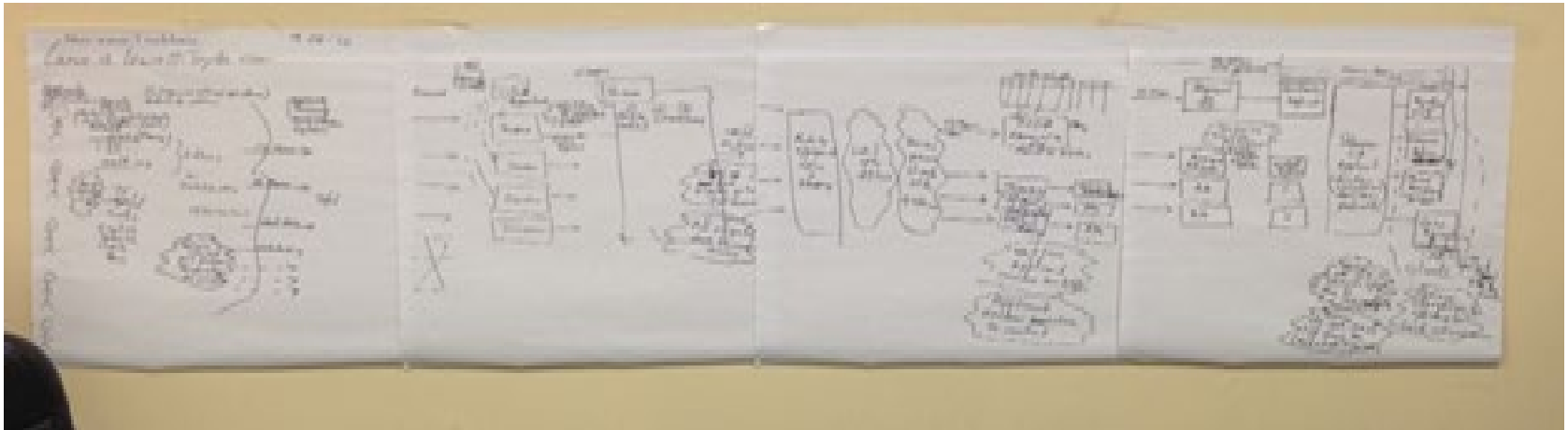- Problems are opportunities!

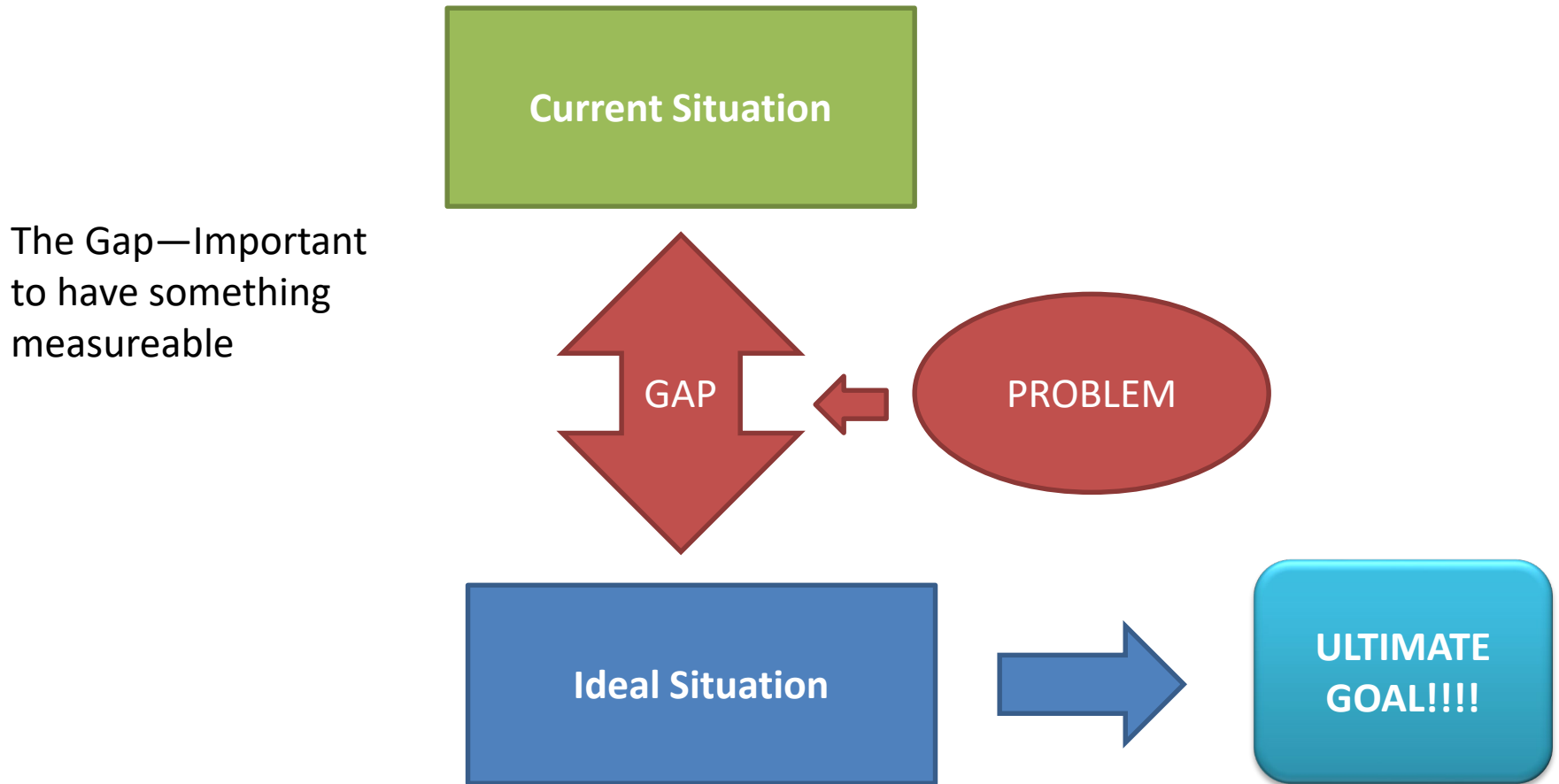# Current Condition of Our Intake

- ➢ Our four main offices did things four different ways
- ➢ Applicants waited for up to a week to be screened for services and even longer sometimes to be assigned to an advocate for services.

What We Did

➤ Charted and made visible the current process

➤ Identified known problems or waste

➤ Go & See intake process (Receptionist, Screeners, Attorney)
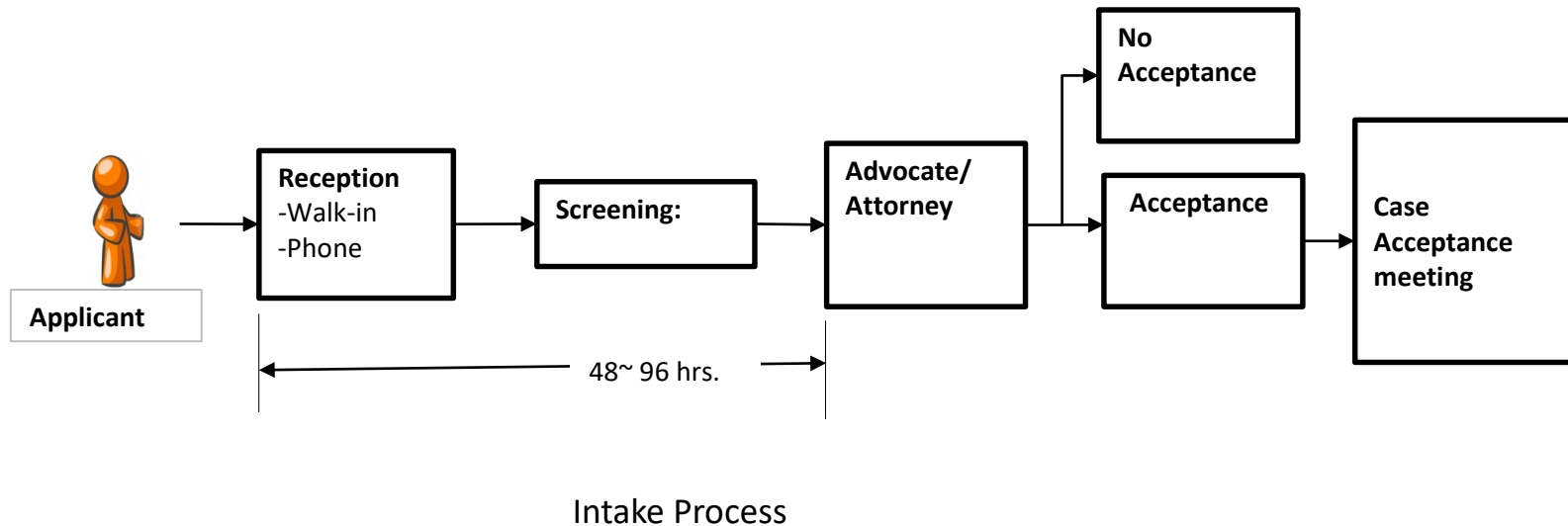
Clarify the Problem

The Gap—Important to have something measureable

Current Situation

GAP

PROBLEM

Ideal Situation

ULTIMATE GOAL!!!!

Clarifying the Problem

➢ "Current Condition" compared to the "Ideal Condition"

  ➢ The Gap between the two is the opportunity for improvement.

  ➢ Small improvements over time result in large
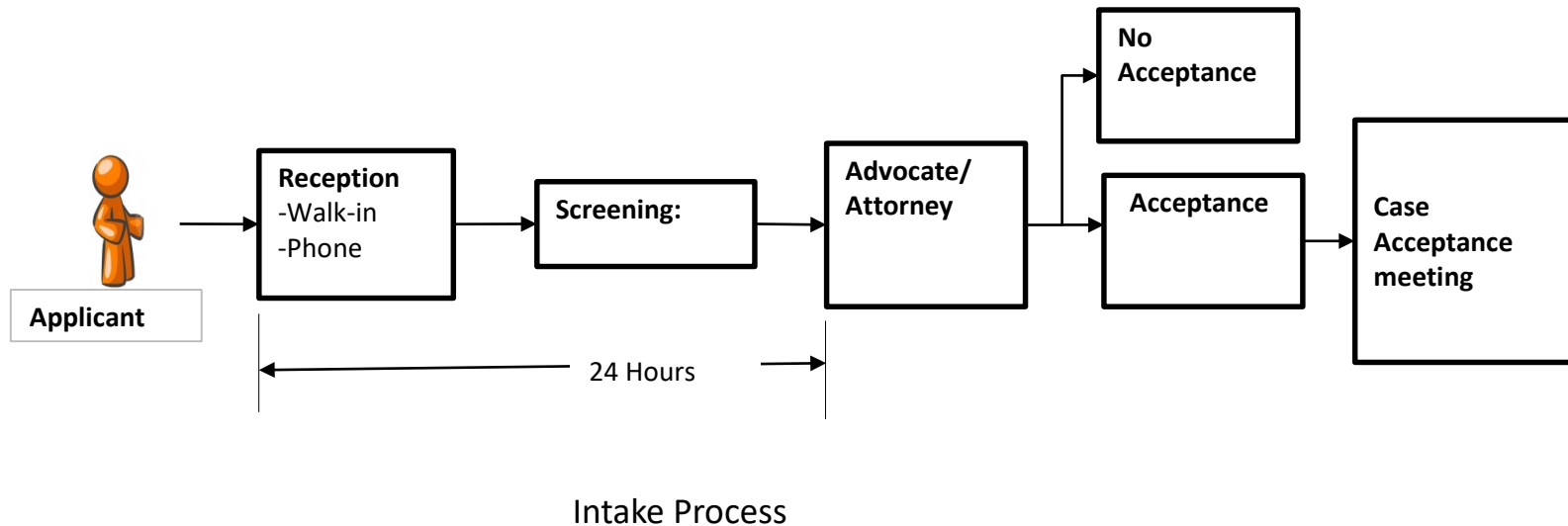
  ➢ improvements.

Initial Condition 4/2016

➢ The focus of this project was to make our intake system more efficient to allow Applicants better access to our legal services and decrease burden on staff.

| **Applicant** | → | **Reception** -Walk-in -Phone | → | **Screening:** | → | **Advocate/ Attorney** | → | **No Acceptance** / **Acceptance** | → | **Case Acceptance meeting** |

48~ 96 hrs.

Intake Process

Ideal Condition

➢ Ideally we want to decrease the time between initial phone call to advocate assignment to less than 24 hours.

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                                                                    ┌──────────────┐
                                                                    │ No           │
                                                                    │ Acceptance   │
                                                                    └──────────────┘
  Applicant   ┌──────────┐      ┌──────────┐      ┌──────────┐      ┌──────────┐      ┌──────────┐
   ─────►     │ Reception│ ───► │Screening:│ ───► │Advocate/ │ ───► │Acceptance│ ───► │Case      │
              │ -Walk-in │      │          │      │Attorney  │      │          │      │Acceptance│
  Applicant   │ -Phone   │      └──────────┘      │          │      └──────────┘      │meeting   │
              └──────────┘                        └──────────┘                        └──────────┘
              │◄──────────────── 24 Hours ─────────────►│
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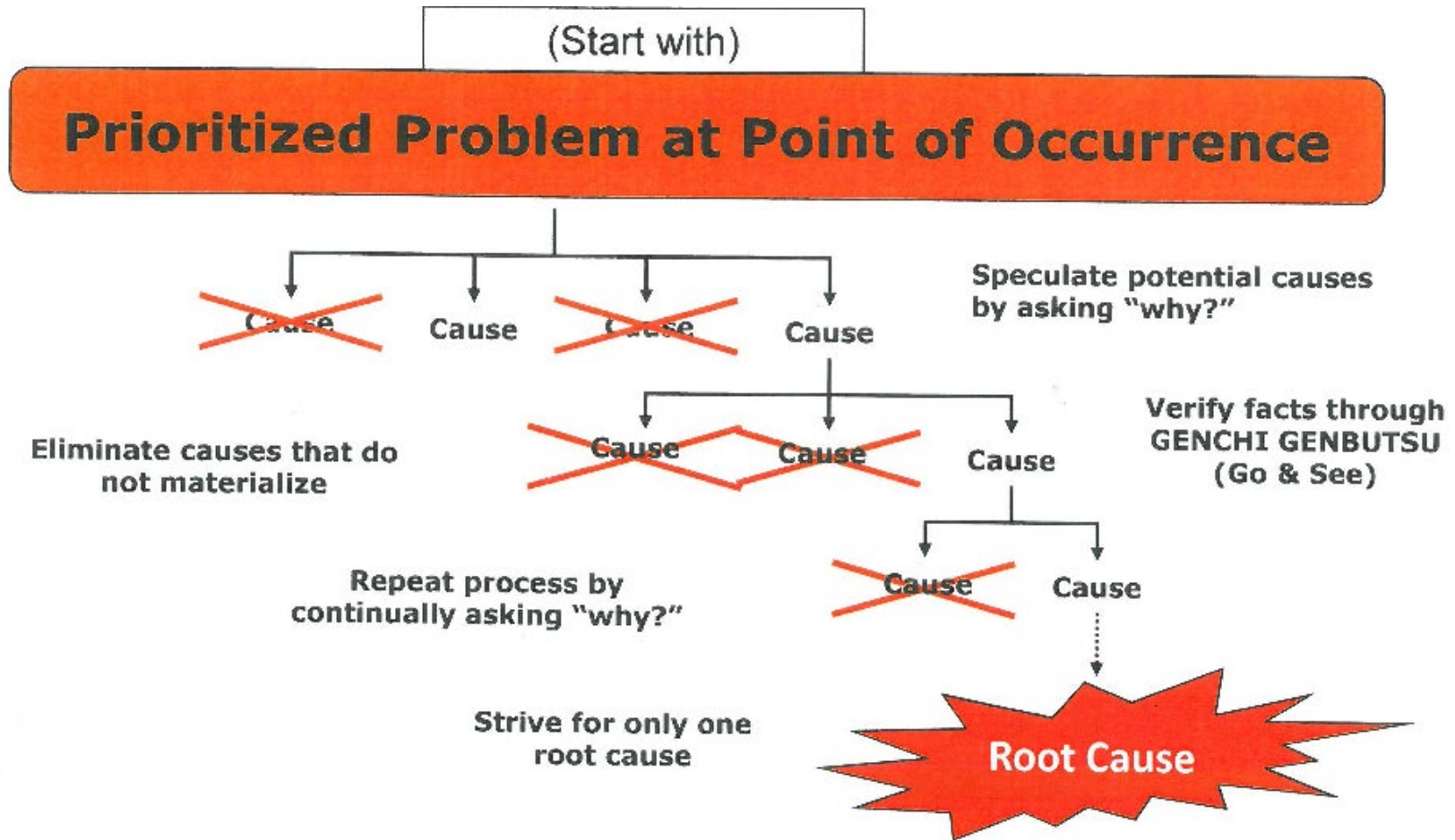
Intake Process

Break Down the Problem
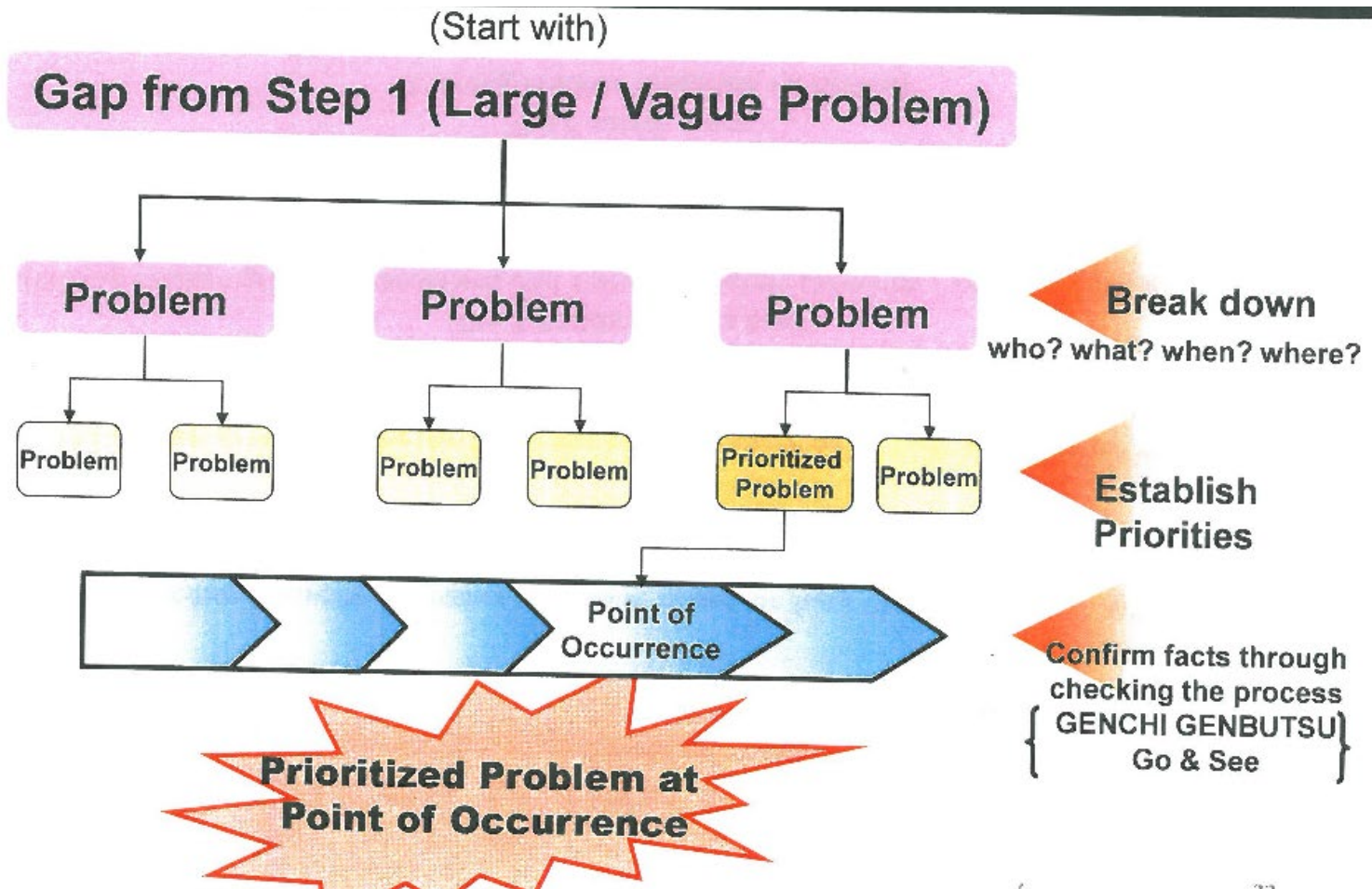
When we broke down the problem….
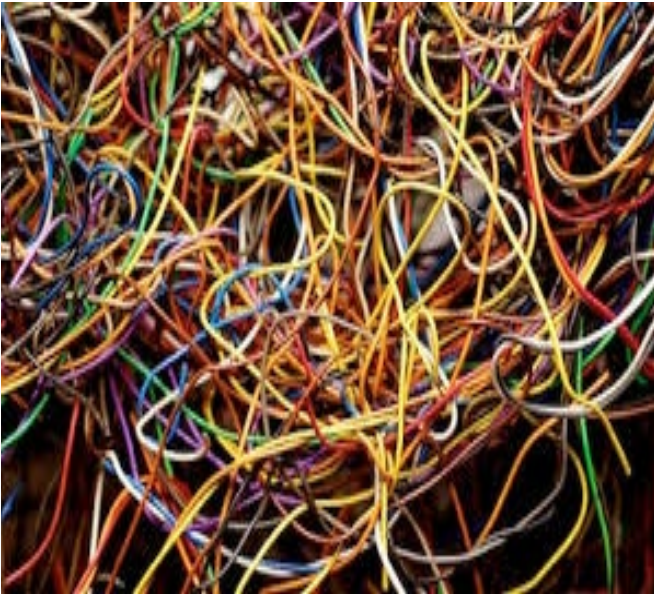
➤ Lack of Standardization
  ➤ Number of available appointments
  ➤ Criteria we were using
  ➤ Methods of screening
  ➤ Assignment of cases
➤ MUDA (Waste)
  ➤ Having too many stops along the way.

Root Cause Analysis

Target Setting

When We Set our Target:
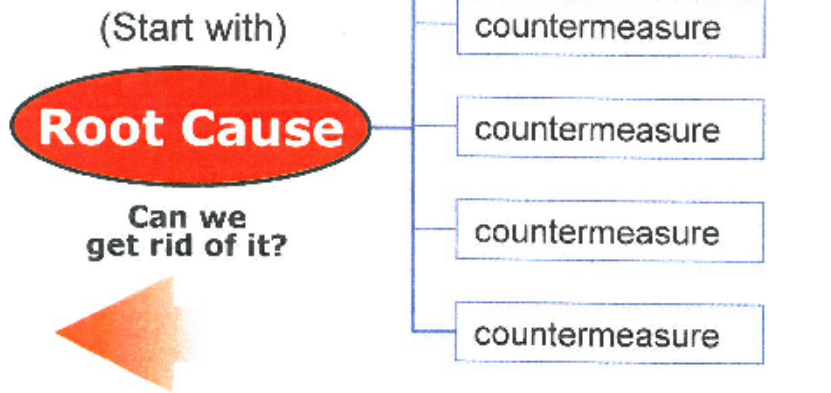
Reduce the lead time to less than 24 hours

Increase # of Intakes by 10%

Develop Countermeasures

Choose most practical and effective

	Cost	Risk	Assessment
C/M #1	×	△	×
C/M #2	○	○	○
C/M #3	○	△	△
C/M #4	×	△	×

Broadly consider potential options

- countermeasure
- countermeasure
- countermeasure
- countermeasure
- countermeasure

(Start with)

Root Cause

Can we get rid of it?

Build consensus and create action plan

What	Who	When
Action	Joe	⟶
Action	Mary	⟶

Countermeasures

- Centralized our Intake
  - All Intake Specialists now screen for all offices
- Created Program wide Policies for case handling
  - Advocate of the Day
  - Case Screening Policy

See Countermeasures Through

- Check progress consistently
- Anticipate obstacles and figure out ways to get through them
- Communicate with everyone by reporting, informing and consulting
- The idea is to solve a problem for good and go on to the next one.

Monitor Both the Results and the Processes

- Was the Target Achieved
- Evaluate it based on:
  - Client's Point of View
  - Organization's Point of View
  - Your own Point of View
- A good process can help get repeated good results
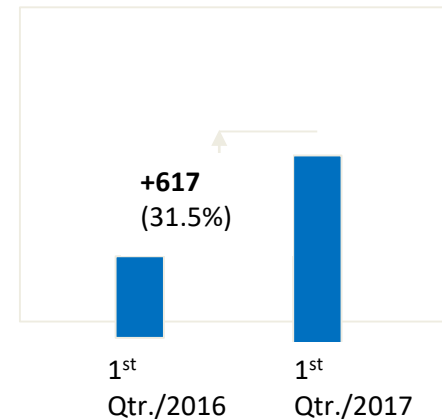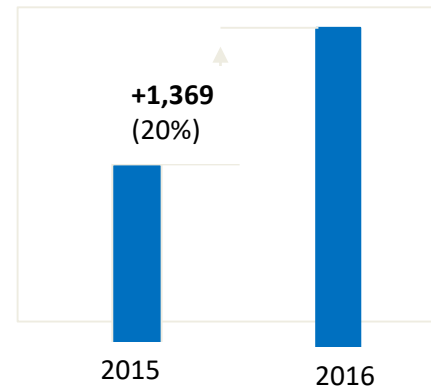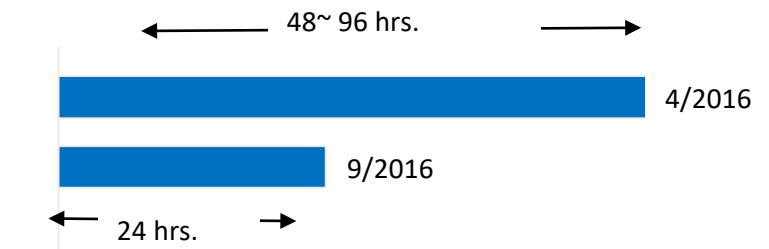- Documenting successful processes helps us sustain improvements

How we measured improvement:

Goal or Target	Actual

- Reduce Lead Time to 1 day Reception-→ Assigned to Advocate

48~ 96 hrs.

4/2016

9/2016

24 hrs.

- Increase the number of intakes by 10%

+1,369
(20%)

2015   2016

+617
(31.5%)

1st Qtr./2016   1st Qtr./2017

Other Improvement Areas

Goal or Target

Actual

Increase the number of closed cases

2016

2015

521 cases or 7.7% Increase

1st Quarter 2017

1st Quarter 2016

406 cases or 35% Increase

Standardize

- Standardization helps maintain improvements

- Once you find the problem, improve the process you standardize the process

Ideal Organizational Culture

You can have all the right strategy in the world; if you don't have the right culture, you're dead.

PATRICK WHITESELL, CO-CEO OF WME

1. Client First Attitude
2. People are the Most Valuable Resource
3. Constant Improvement
4. "Shop Floor Focus"

Clients First!

- For us, this means that we try to get it right the first time.

- Look at our process from the point of view of our clients and sometimes our staff depending on what the project is focused on.

- Set and Meet Expectations

People are Your Most Valuable Resource

- Treat your employees like Gems and not Stepping Stones
- Your organization can only be as effective as the people who are in it. Motivate and develop staff
- Only people are capable of learning from their mistakes and problem solving.
- Work on not wasting their time with meaningless tasks (Honor their humanity)
- Sometimes that means taking a hard look at employee fits for positions

Struggle Points/Lessons Learned

➢ **Change is hard and need top level on board and involved.**

➢ **Getting the right culture takes years/lifetime but it makes the difference between good/great. Comes from top and impacts everything.**

➢ **Involve staff in the learning process, communicate that it is to help them, not to make them work harder. Shop floor helps not only in problem solving, but in team and moral building.**

➢ **Utilizing the problem solving method takes discipline but it is critical and saves time in the end.**

    ➢ **Many trials to get it right**

    ➢ **Requires patience and practice**

➢ **Convincing people to use the problem solving and be more reflective is a challenge in busy practices.**

Legal Services of Greater Miami

LEAN SIX SIGMA

Before TPS

- Prior to participating in the Toyota project with FRLS we had centralized our intake.

- Pitfalls of our "process":

  – Assumption about what the problems were

  – Trial and error until we reached a system that worked

  – Did not start with data at baseline condition and measuring the gap

  As a result, improving our intake system took longer and it was harder to explain the benefits at the outset.

The TPS Effect

- After participating in the Toyota project our program invested in Lean Six Sigma Black Belt training.

- As part of the Lean Six Sigma training I took on a project and selected a team.

- The team was trained as Green Belts throughout the project.

Lean Six Sigma Methodology

- To solve a problem using Lean Six Sigma you:
  - Define
  - Measure
  - Analyze
  - Improve
  - Control

Lean Six Sigma Project

- **Problem**: cases handled from Liberty City is down since 2016.

- **Assumed causes**: we moved further from this community in December 2016 and that is why we experienced a drop in cases.

- **Suggested solution**: more outreach to the community is needed so they know we are still here.

CASE SOLVED

What We Learned

- The problem pre-dated our move, numbers have dropped steadily since 2014.
- We are not just seeing a drop in cases but an overall drop in intake.
- 30% of what we reject are private housing cases which is the legal issue the community has identified as most important.
- The community knows about our services but that also means they know we don't handle most private housing cases.
- Increasing intake would not lead to more cases unless we open up intake for private housing
- Held "kaizen" event with a cross section of staff and came up with a proposed solution.
- We are currently piloting the solution for full implementation next month.

Tools We Used

- SIPOC
- Process Map
- Project Charter
- Communication Plan
- Voice of the Customer
- Reports from our CMS
- Focus Group
- Kaizen Event
- Tollgates

Culture Change

- We are using BPA tools in:
  - Intake
  - Finance
  - Fundraising
- We talk about BPA in discussions at management meetings and in administration.
- We are changing the culture of our office to:
  - Go and see
  - Not solution jump
  - Tackle tough problems
  - Always ask "why"

Train the Trainer

- **Partnership with Seyfarth Shaw**
  - Why Seyfarth Shaw?
  - Goal of the Training
  - Attendee Requirements:
    - (1) Member of the management, finance, technology or litigation team AND
    - (2) Have some decision-making authority at their organization to try to implement what they learned at the training
  - Training Components:
    - Pre-Training "Lunch & Learn" and Homework
    - In-Person Training
    - Post-Training Projects and Support

Wrap Up and Questions

➢ Any Questions for us?
➢ If you want a copy of this presentation, please email Melanie at melanie.barker@frls.org
➢ This afternoon is a workshop with Ilenia and Kristen where you can get hands on experience on using Business Process Analysis