

MAINSTREAM GS, LLC

Raising the Bar

A Disciplined Approach To Helping
Create High Performance Organizations

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Overview

MainStream GS (Global Solutions) is a Management Consulting firm with its roots steeped in Lean and other Continuous Process Improvement (CPI) methodologies. In working with numerous clients in industry and the public sector over the past decade we have learned that organizations that thrive in their CPI implementations, and gain the most from these tools and methods, are those that have a concrete understanding of their Values, and their Mission, along with a clear Vision of where they are trying to go. These organizations see themselves in terms of their Value Streams. They develop strategies to overcome barriers to success and focus their CPI efforts on achieving their strategic objectives, measuring their progress on a regular basis, and following through on their plans. They have a culture of discipline that supports their mission / vision and abhors work arounds, solving problems as they occur.

Successful organizations also have an engaged servant leadership that provides clear goals and expectations, empowers the workforce to act and removes barriers that get in the way of progress. They recognize that while there are formal leaders in the organization, there are many more informal leaders ready and capable of rallying the workforce and driving improvement from the bottom up. These organizations have learned to create an environment that leverages their understanding and application of CPI tools and methods in order to execute their strategies, achieve their desired objectives, and continuously improve their processes.

At MainStream GS our mission is to help our clients create and sustain high performance. In order to truly achieve our mission we determined that we needed to “Raise the Bar” on how we approach CPI implementations and focus significantly more effort on understanding an organization’s barriers to success; teaching, coaching, and mentoring client leadership on Strategy Development, Strategy Deployment, Leader Standard Work (the first measure of internal discipline), and Change Management. By raising the bar on what our focus is, we help clients raise the bar on their successfully becoming “High Performance Organizations”.

Our definitions of High Performance Organizations are those that:

- 1) have a clearly defined mission and align their organization around their value streams.
- 2) define their vision for the future, identify their Key Performance Metrics and measure their progress toward achieving that vision.

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- 3) drive toward that vision by identifying the barriers to achieving that vision, creating strategies to overcome those barriers, and aligning the various resources of the organization in order to focus the organization on executing those strategies.
- 4) have a culture of disciplined standard work that abhors workarounds and allows for continuous process improvement efforts to solve problems at the root cause, drive out waste and dramatically improve Quality, Cost, and Delivery.
- 5) have an engaged “servant” leadership that provides clear goals and expectations, empowers the workforce to act, and removes barriers that get in the way of progress. They focus their enabling processes and governing processes on continually supporting the value added, core process elements of the organization in order to deliver better value to their customers.

These themes are repeated throughout this paper, because at MainStream we believe that it is this disciplined approach that differentiates organizations that succeed in achieving High Performance from those that fail.

Strategic Plans

Most organizations that develop strategic plans treat them as additive to their daily operations. They are high level documents that provide overall guidance and direction, but rarely become integrated into the daily activities of the various divisions, departments or units.

Simply put, organizations and what they do are systems that take various inputs and process those inputs into meaningful products, services, or outcomes that are desired, or required of an internal or external customer. Strategic plans should focus on an organization’s clearly defined mission, establishing a vision for where the organization needs to be in the future, addressing the barriers it faces in achieving that vision. Along the way organizations that don’t continuously improve the manner in which they provide value to their customers lose ground to organizations that do.

Effective strategies should seek to modify the system’s inputs, processes, and outputs in some manner as to deliver desired future state results, and do so with a focus on improved Quality, Cost, and Delivery. This requires change. Even when the technical application of change is easy, the human element of change is hard. The 100% technical solution that is applied with 0% acceptance will fail. Because of this, the understanding and application of change management is critical in any effort to transform an organization to high performance.

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We utilize the expression that $T \cdot A = S$; the technical solution times the acceptance is what equals sustainable change. We further state that the T only represents 20% of the equation, while A represents 80%.

Distribution of Early Adopters, Active Resisters and Fence Sitters

Change experts will tell you that in any distribution of people there are a small number of individuals that are early adapters willing to accept change, and that there are an equal number of active resisters to change. The remaining individuals are somewhere on the fence.

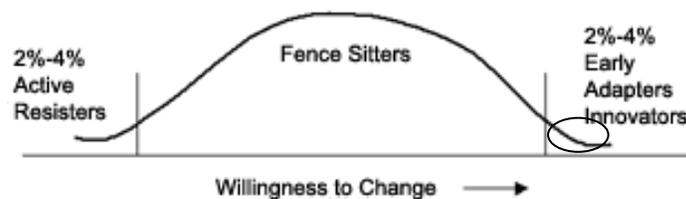


Figure 1 Change Curve

Transitioning an organization to a desired state requires overcoming the inherent resistance to change. Ultimately change requires getting momentum and transforming the thoughts and actions of individuals through learning. As the organization's members learn the value of the desired change and begin to understand the reasons and need for change they begin to join the early adapters.

An early epiphany for MainStream is that this dynamic of early adapters, fence sitters and active resisters, while true within organizations, also applies to organizations within industries. Early adaptive organizations with innovative leadership are the ones that have been hugely successful in using Lean to drive improvement within their organization. They, however, represent a small portion of the population. The vast majority of organizations that have tried to implement Lean in the manner driven by our Japanese Senseis have either produced limited gains, or failed outright, rejecting Lean as another program of the month.

Those of us that have been lucky enough to have been associated with successful transformations often failed to understand the underlying factors of our success. We assumed it was the execution of improvement activities, fundamentally Kaizen that drove success. While fundamentally true, the underlying factor that enabled our success was that

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we had an early adaptive culture that was willing to accept what our Japanese Senseis told us to do. We embraced change and leveraged it to achieve the goals our innovative leaders challenged us with.

So the question becomes, how do we help organizations create a culture that will enable them to leverage CPI tools and methods to achieve their stated goals and objectives. This is the challenge that MainStream has taken on, and the one we feel differentiates us from the traditional Lean or Six Sigma consultancies.

Change Transition and Levels of Learning

Because of the distribution of early adapters within an organization, we see transition to a changed state as one of overcoming inherent resistance to change as it relates to *Levels of Learning*ⁱⁱ.

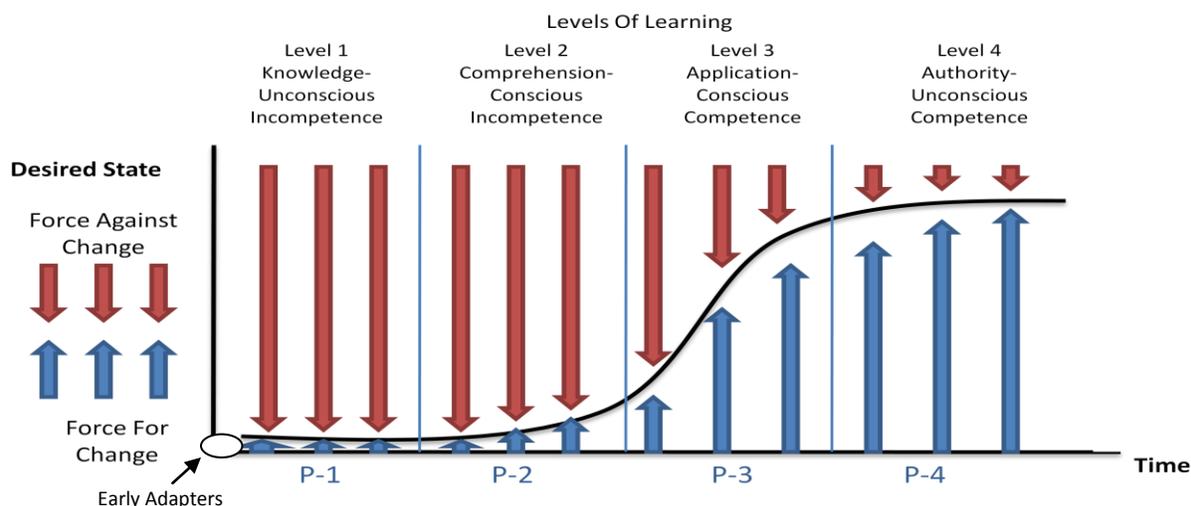


Figure 2 Levels of Learning

At Level 1 – Client is “Unconsciously Incompetent” or Status Quo

- There are a few members of the organization (hopefully senior leadership among them) that are committed to the desired change, but as a whole the organization doesn't know what it doesn't know, and believes that the “Status Quo” is ok.
- The organization lacks the understanding of perceived value to desire and contribute to the change.

At Level 2 - Client organization is “Consciously Incompetent”, or Reactive.

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- There is momentum building in support of change. Individuals recognize and are beginning to react to the inherent problems.
- The organization is aware that it has problems it needs to overcome, but is unsure as to how to overcome those problems. Most of the time the organization doesn't take action until the problem exposes itself.

At Level 3 - The organization as a whole is "Consciously Competent" or Proactive.

- They know what the problems are and begin to anticipate problems in advance. They consciously know what tools they need to apply in order to overcome those problems. They begin to proactively get in front of problems.

At Level 4 - The client organization is at a level of Unconscious Competence or Progressive.

- They know what to do and do it without consciously thinking about it.
- It is imbedded into their cultural mindset.

The level of support and the kind of support clients need throughout this transition changes as organizations shifts between the various Levels of Learning. Because of this, when offered the opportunity to engage in a full transformation effort, MainStream GS applies situational consulting, based on where the client is in that transition.

MainStream GS' Full Engagement Approach

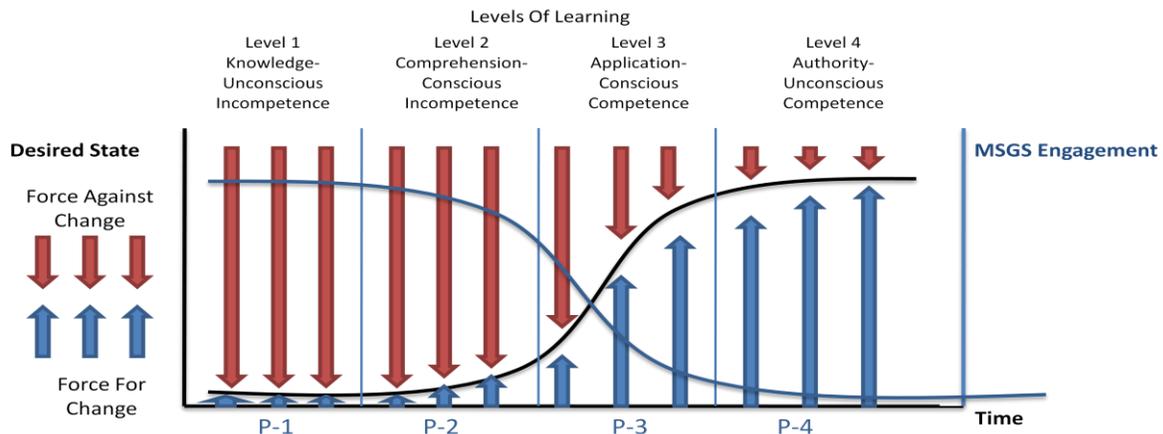


Figure 3 MainStream Engagement Curve

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Our engagement curve mirrors the transition curve. P-1 through P-4 represent the Phases of the Engagement. A typical transformation takes 3-5 years with varying levels of support throughout the term of the engagement. The progress is never as smooth as represented. There are always slides and disruptions along the way that need to be overcome in order to regain progress.

While the desired state is pretty well defined within the early stages of the engagement, the time required to achieve the various phases of the transformation is dependent on a number of factors including:

- The size of the organization
- The size of the effort
- The engagement of Client Leadership throughout the organization, and the impact of changes in Client Leadership throughout the organization.
- The clarity and focus of the Strategies and Key Performance Metrics
- The level and scope of change required.
- The level of resistance and discipline regarding standardized work.
- Factors of influence and control external to the organization including
 - Suppliers
 - Customers
 - Regulatory Barriers
 - Funding

Phase 1 – Client organization is at Level 1 Learning (Status Quo) - This is the first critical point in the engagement. It sets the tone and establishes the direction. There is a famous Lewis Carroll quote that states, “If you don't know where you are going, any road will get you there.” Attributes of the engagement are that:

- Forces against change are strong and the case for change must be established,
- Consulting engagement with all levels of client leadership must be high, in a understanding, communicating, teaching, and directing mode.

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- **Mission, Vision and Strategies are established.**
- **Governance Structure is put in place and Strategy Alignment and Deployment is set in motion.**
- **A strong Communications Plan is established as is an understanding of how deployment will flow through the Change Management Plan. The communications plan also establishes a common voice behind the case for change and allows for two way dialogue, communicating the WIIFM (What's In It For Me) to each stakeholder in the organization.**
- **At this initial launch of a program, the client's internal program office, if there is one, is at best enthusiastic but don't know what to do. Typically MainStream GS needs to oversee the program and help develop the structure and roles of the program office.**
- **In addition to engagement at the Leadership Level of the organization, MainStream GS is training and coaching both technical and cultural acceptance tools / methods at the tactical levels of the organization, producing early wins, preparing them to be able to apply those tools and methods in executing the strategies.**
- **Business Process Re-engineering and changes in physical layout of process centers begins to take place, in sync with focused plans.**

Phase 2 – Client organization is at Level 2 of Learning (Reactive) – At this point in the engagement all of the basic systems and structures are in place, but many of the embedded problems have begun to surface and efforts need to be taken to break down the barriers that have appeared. Client Leadership needs to have begun transitioning from supportive to actively engaged and driving. Facilitation at the tactical level is being handled, predominantly by qualified internal facilitators. The attributes of the engagement are:

- **Forces for change are gaining momentum. Program office is functioning with organic leadership, and internal facilitators.**
- **First iteration of Strategy Alignment and Deployment is completed. MainStream GS engagement with all levels of client leadership is still high, but the client has internal organic capability to facilitate events and projects. Strategies become more focused as true barriers make themselves known. Internal discipline and Leader's Standard Work are focus areas. Metrics need to be adjusted or reset based on initial learnings.**

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- Efforts continue regarding business process re-engineering, and physical changes in process centers.
- Communications and change management plans have to be adjusted for shortfalls.
- New leaders need to be brought into the fold and senior leadership needs to hold all levels of leadership accountable for driving strategy deployment and CPI.
- Ownership of continuous improvement efforts needs to begin to shift from the program office to the workplace, with local supervisors learning and facilitating problem solving, maintaining process discipline and focusing on improved Quality, Cost, Delivery and Safety.
- MainStream GS' focus varies on a situational basis from teaching and directing, to coaching, and mentoring. Problem solving and overcoming pockets of resistance become areas of focus.

Phase 3 – Client is at Level 3 Learning (Proactive)

- Forces for change are strong.
- Engagement with all levels of the client leadership is going down.
- Client has organic experts.
- Business Process Re-Engineering efforts are in place, as are physical layouts and restructuring of process centers.
- Consulting focus is on coaching, continued problem solving, transitions of new leadership, and heavy focus on internal disciplines to both leader's standard work and standard work within the various process centers.
- Efforts are expanded along the value chain back into suppliers, and out to customers so that sub-optimization is avoided, and the entire value chain appreciates the gains.

Phase 4 – Client is at Level 4 Learning (Progressive)

- Forces against changed state are small.
- Systems and Structures are embedded into the culture of the organization.

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- Engagement with organic staff and leadership is small, auditing and problem solving. MainStream GS shifts into a Trusted Advisor Role with expanded efforts as needed.

Critical Success Factors

Once the need for help and the engagement strategy is understood, we begin the process of implementing our methodology for creating High Performance Organizations. The remainder of this paper defines in further detail MainStream GS' methodology for creating High Performance organizations. Each of these elements is performed as part of the 1st year launch and engagement. The follow on years, as defined above, are used to overcome problems and continue the transfer of knowledge as the organization transitions itself.

Figure 4 - Identifies Four Critical Success Factors for creating sustainable high performance within an enterprise.

- **Factor 1 - Structure the Enterprise to Support the Core Business Processes**

- The **Core** processes of an enterprise exist to accomplish specific outputs for specific customers. All other processes are designed to serve functions and generate internal outputs required by the Core processes to be successful.
 - **Support** processes do things that allow the Core processes to work as designed
 - **Governing** processes do things to manage the conduct of both Core and Support processes.
- High Performance (effectiveness and efficiency) results when all processes are operating as designed

- **Factor 2 - Align Performance Measurement to the New Structure of the Enterprise**

- Given the awareness of the enterprise purpose (Factor 1) and the new structure fulfilling it (Factor 2), we align the way we measure the performance of the enterprise system and all of its sub processes and components. Clear expectations and timely feedback on how we are doing against those



Figure 4 Four Critical Success Factors

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expectations is the most effective way to maintain focus and situational awareness, and formulate adequate and timely responses to conditions that fall outside our desired expectations.

➤ **Factor 3 - Execute Strategy Alignment & Deployment to Optimize Change Efforts**

- The timely & complete understanding of how the enterprise is performing, where the shortfalls exist, and leadership's clear read on the external factors, allows for the best allocation of improvement resources. Maintaining clear objectives to address these shortfalls and threats is the purpose of Strategy Alignment & Deployment. Bringing the efforts to the necessary conclusion requires an element of program and project management to govern the prioritized list and facilitate the required progress.

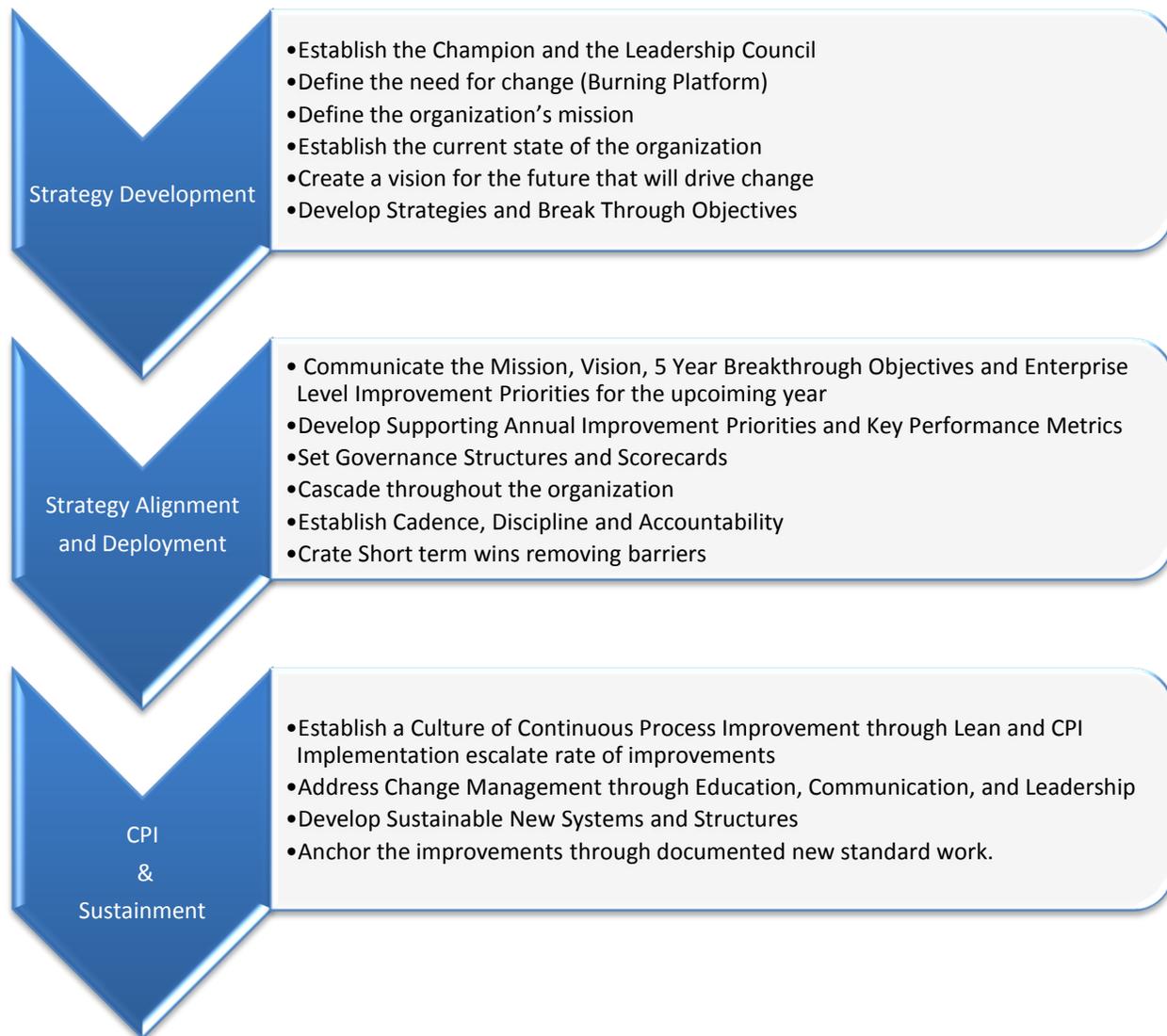
➤ **Factor 4 - Provide Leadership & Foster Collaboration**

- Leaders must maintain awareness of performance of the enterprise, understand the weaknesses and threats to the organization, set a clear vision for the future, provide the necessary resources, and facilitate success through the removal of roadblocks. This is most meaningful and best accomplished by building a cohesive team and installing the necessary systems to execute their leadership. This extends, through collaborative means, down to the lowest levels of leadership within the enterprise.

Sequence of Steps in launching transformation

The following figure represents the series of step MainStream GS takes in launching a transformation effort. Depending on whether or not we are engaged for a full transformation or are simple engaged to solve problems, each of our consultants looks for opportunities to engage the client leadership in an understanding and acknowledgement that a holistic approach that focuses on strategic objectives, and aligns the organization around value stream objectives is a more robust methodology for establishing cultural acceptance that fosters sustainment.

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Prior to actively engaging the Leadership Council or Executive Steering Team, the Sr. Consultant conducts both a Cultural Assessment and a Business Case Assessment. We also work with a leadership champion and select members of the client organization to collect data in support of SWOTⁱⁱⁱ and STEEP^{iv} Analysis (described later), and to develop rough cut Enterprise Value Stream Maps, and high level SIPOCs (Suppliers, Inputs, Processes, Outputs, and Customers).

We begin our engagement with the Executive Leadership by having them define their Mission. Jim Collins, in his breakthrough book, Good to Great^v, defines mission around a Hedgehog Concept that focuses an organization on what they have a passion to do, what they believe

they can be the best in the world at, and what drives their economic engine (or in other terms what they get paid to do).

Defining the Mission is the first step in the process; the second is to establish a Vision for the future. In order to do this the organization must define their current state and the various barriers facing them. This is accomplished through the use of a number of tools. A SWOT analysis helps them define their Strengths, Weaknesses, Opportunities, and Threats. A STEEP Analysis identifies those external factors; Social, Technological, Economic, Environmental, and Political that might have an impact on their success going forward. The cultural assessment identifies the organization's current state of change readiness, and cultural barriers to change, and the business case analysis establishes the financial imperatives for change, whether they be profit motivated, as is the case for commercial enterprise, or they present a valid value proposition as is the case regarding funding limitations in the public sector. The Vision for the future attempts to establish where and how the organization sees itself 5-10 years out.

The SWOT and STEEP are used to define areas to leverage, and potential barriers to achieving the desired, "Future State Vision". Those, along with the Cultural Assessment, establish the foundation for Scenario Planning, and developing Strategies to overcome the barriers for success. These Strategies become Break-Through Objectives for the organization that lay the foundation for their Strategy Deployment.

As noted, Strategy Documents rarely drive specific activities at the actionable levels of the organization. This is the reason most of them are completed, only to rest untouched on bookshelves.

Strategy Alignment & Deployment aligns the resources of the organization by establishing Annual Enterprise Improvement Priorities against the Break Through Objectives, and cascading those down into the organization utilizing a "Catch Ball" process designed to gain commitment to measurable lower level Annual Improvement Priorities, and action plans throughout the organization.

It is important to note that this alignment and deployment affects not only the core process owners, but the governing and enabling process owners as well.

Successfully executing Strategy Deployment requires a three prong approach:

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- **Method** - establishing and sticking to an agreed upon, consistent methodology throughout the organization
- **Governance** - developing and committing to a governance structure (complete with Leader Standard Work) to track progress, establish accountability, reward success, and institute corrective action as required.
- **Change Management** – utilizing a change management program around Kotter’s 8 Steps to *Leading Change*^{vi} in the execution of SA&D.

The integration of this three pronged approach provides the DMAIC (Define, Measure, Analyze, Implement, and Control) discipline to the overall process of SA&D execution. Throughout the execution of the SA&D process it is important that the entire organization understand how their role supports the Mission of the organization and what they can do to help achieve the Vision.

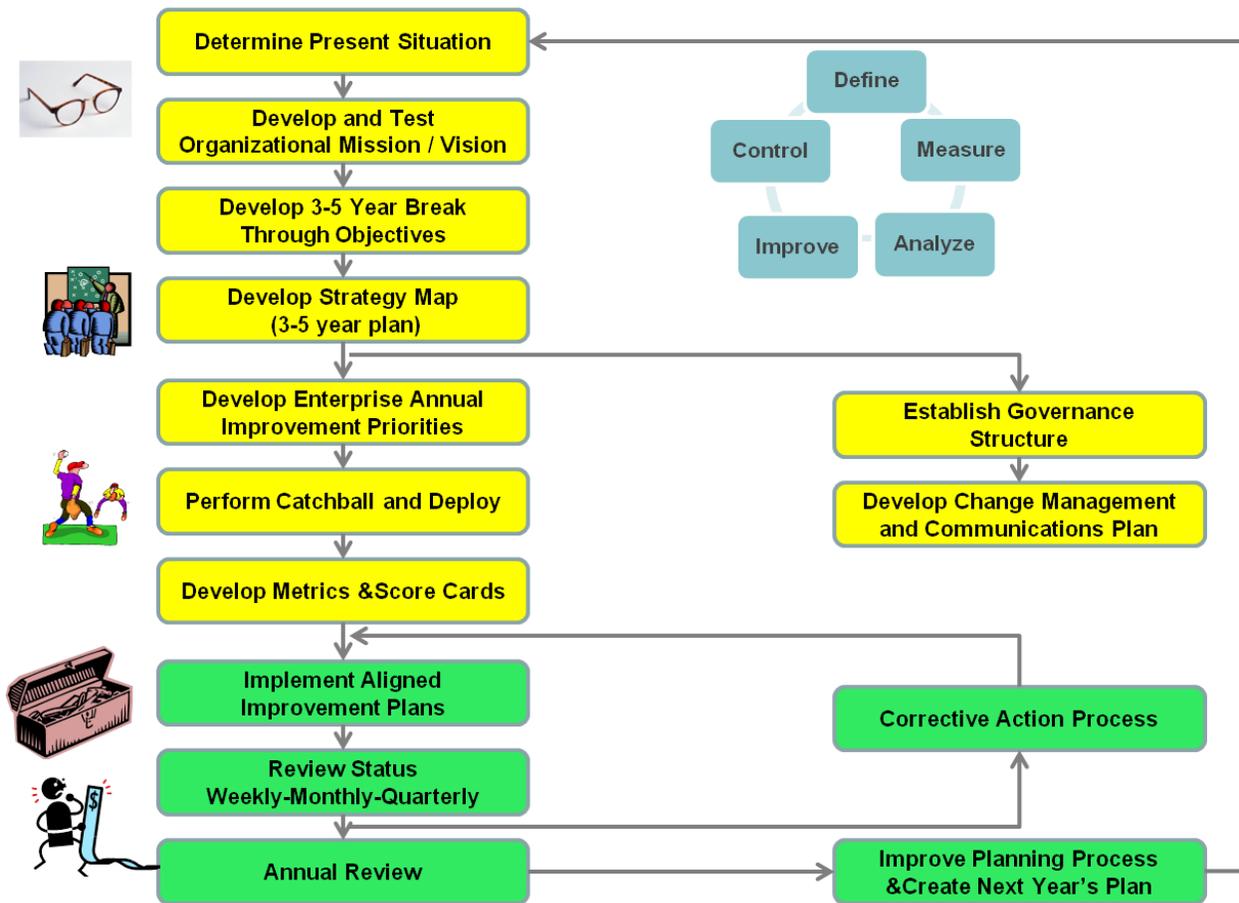
The consistent methodology begins to create a common language. The Governance provides metrics that track performance to the plan, and provides feedback and corrective action where needed, and creates a communications trail that links all levels of the organization both top down and bottom up.

The purposeful execution of change management actively converts the fence sitters, and often the active resisters to join the effort, facilitating alignment and focus on the part of the organization. It also serves to break down functional barriers by targeting and measuring impact on the value stream of the organization, rather than functional metrics that often sub-optimize the organization as a whole. As individuals begin to see what it is they can do to move the Key Performance Metrics of the organization, and as executing the aligned strategy begins to generate success in achieving shared organizational goals, the members of the organization begin to accept a culture of continuous improvement as the norm of the organization.

Strategy Alignment & Deployment Methodology

Our methodology for Strategy Deployment is derived from the Hoshin Kanri ^{vii}Model, incorporating elements of Change Management and Balanced Scorecard.

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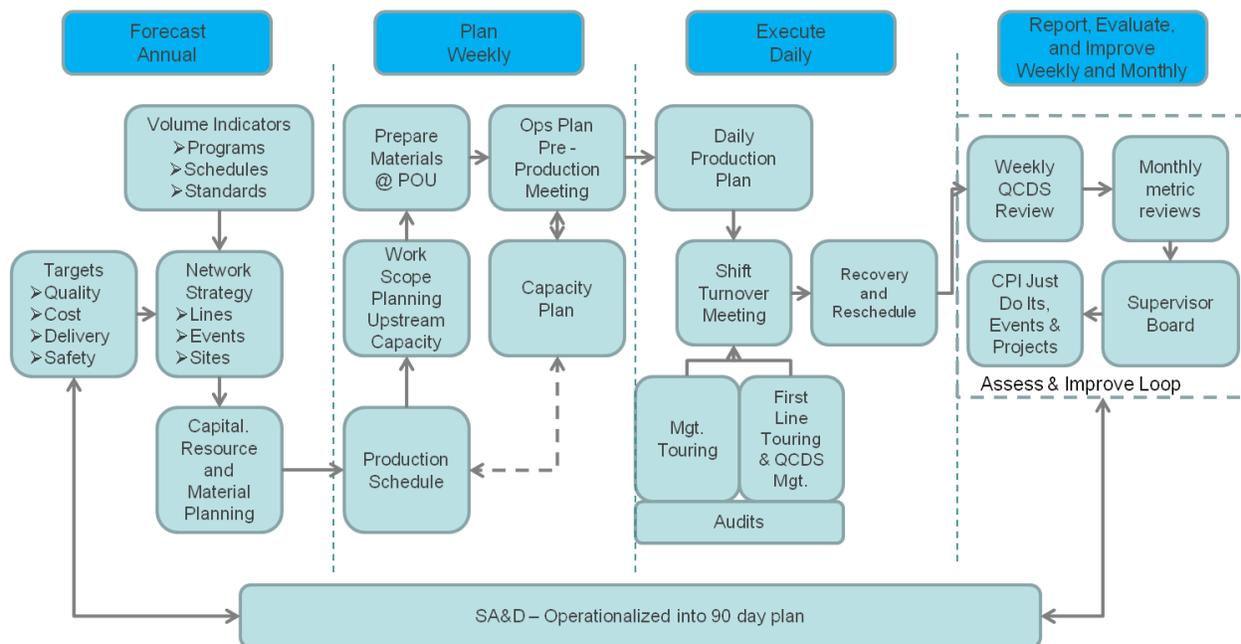


This methodology is designed to align the resources of the organization in support of the organization's strategies, commit each division, department, and sub-unit of the organization to specific plans and objectives in support of the organizations enterprise level annual improvement priorities, track progress, and take corrective action as required.

Governance Structure

The governance structure establishes the Steering Teams throughout the organization from the Executive Level, down through the various sub organizations, and sets a battle rhythm for the organization through agreed upon Leader Standard Work.

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Change Management

We utilize a number of Organizational Change and Development Tools and Methods, in order to support a change model derived from Kotter's 8 Steps to Leading Change.

1. Establish a Sense of Urgency
2. Create a Coalition
3. Establish a Vision
4. Communicate the Vision
5. Empower People to Remove Obstacles
6. Secure Short Term Wins
7. Consolidate the Gains and Keep Moving
8. Anchor the Change

Kotter's Leading Change

As we facilitate the organization through their transformation we coach the Client Leadership to ensure that they are establishing a Sense of Urgency in setting up their Executive Council and Steering Teams, establishing their Strategy Alignment and Deployment Governance Structures, and in communicating their "burning platform" for change. We create their coalition through the various leadership councils, and improvement teams, and have their leaders establish and communicate the vision for change. Through the plans, support structures, and CPI methodologies we empower people to remove barriers. The organization obtains short term wins through their initial CPI efforts and secures them through the

development of standard work. Changes in systems and structures, combined with required changes in policies, procedures and work instructions anchor the change.

The change management plan includes an integrated Communications Plan to communicate the need for change, and further communicate the progress, both positive and negative of Strategy Deployment throughout the organization.

Throughout our engagement we employ our model for success where our consultants and delivery managers conduct blind assessments to ensure that they are successfully engaging the client in each of the key areas of change management, and technical execution. From these they coach the leadership regarding shortfalls in their transformation.

Program Management Office

The transfer of knowledge begins with our exchanges with leadership and is extended throughout our work at all levels of the organization. The formal transition to internal/organic facilitation capability begins with the establishment of the organic program office. There are many variations regarding how organizations develop and foster this internal support organization. The best are those in which the office is used to transfer knowledge skills to up and coming future leaders within the organization. The idea is for them to enter the office, gain the skills by becoming internal trainers and facilitators, then roll them back into the workplace as supervisors and managers in their areas of expertise.

The below graphic defines our typical engagement as it regards establishing the internal Program Office.



Program Management Office

- Work with Senior Leadership to Establish Continuous Process Improvement Program Office and identify manning requirements
- Provide a Sr. Level Consultant to Oversee the Program Office
- Establish the criteria for an Organic Program Lead and participate in selection
- Train and Mentor Organic Program Lead
- Develop Program Office Standard Work
- Develop Organizational Transformation Assessment Tool and Baseline
- Establish Subordinate Offices with Consultant Oversight
- Establish Transition and Exit Plan
- Develop Scoreboards and Review Cycles
- Train Organic Facilitators for Certification
 - Use Formal Training, and Facilitation of Projects and Events tied to the Strategy Deployment to create organic facilitators
 - Mentor Organic Facilitators on how to coach leadership and follow through on activities
- Conduct weekly Good Bad and Ugly (GBU) meetings with Senior Leadership providing information, recommendations and feedback.

During the course of executing this disciplined approach to creating High Performance Organizations, our Expert Consultants draw upon a number of situation support tools and methods.

Technical Support Tools and Methods



Situational Support Training and Materials

- Financial Systems (Traditional VS Activity Based Costing VS Earned Value Management VS Lean Accounting)
- Visual Management
 - QCDS Management (Quality-Cost-Delivery-Safety)
 - 5S or 6S
 - Plan to Actual Charts
 - Quality Check Sheets
 - Statistical Process Control (SPC)
 - Lean Newspapers
- Value Stream Mapping and Analysis
- Total Productive Maintenance (TPM)
- Quality Function Deployment (QFD)
- Six Sigma DMAIC, Green Belt and Black Belt Training
- Six Sigma Statistical Tool Set (Minitab)
- Theory of Constraints (Goldratt)
- Lean (Entire Suite of Lean Tools and Methodologies)
- Program Management
- Project Management
- Organizational Development Tools (Team Building, Change Management, Improved Communication, Leadership)
- Scorecards

Cultural Support Tools and Methods



Additional List of Change Management Tools

- Change Transformation Curve
- Teaming Curve (Forming-Storming-Norming-Performing)
- Situational Leadership
- Kotter's Leading Change
- Collin's Good to Great Principles
- Covey's 7 Habits of a Highly Effective People
- Values Systems
- PA/PT
- Myers Briggs Indicator
- True Colors
- Adult Learning Theory
- Chaos Theory
- Transactional Analysis
- 5 Dysfunctions of a Team
- Liker's and Hoseus' Toyota Culture
- Senge's The 5th Discipline
- Dealing with Difficult People
- Cultural Assessments

Leadership

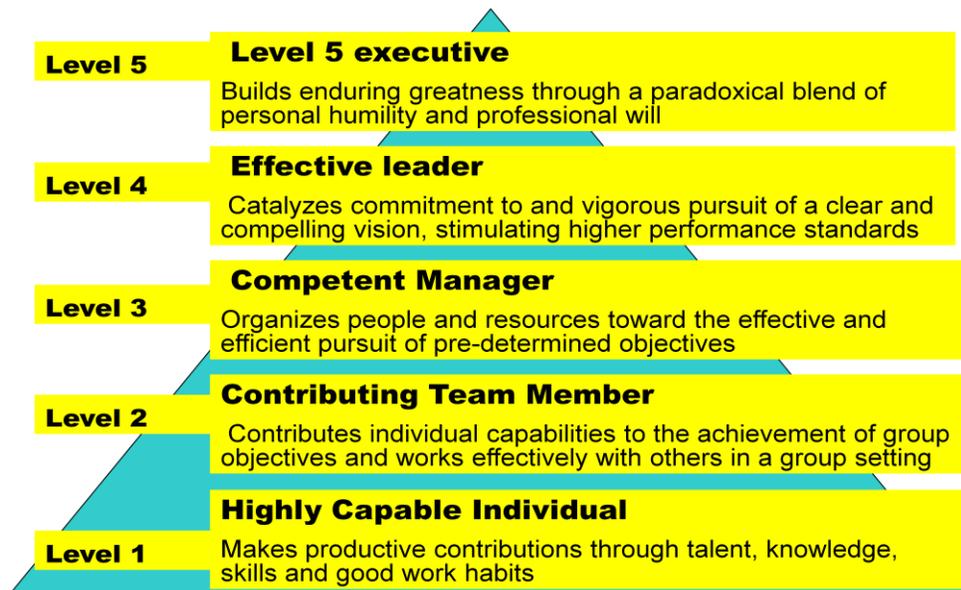
The most critical challenge organizations face in successfully executing Strategic Plans and developing sustainable systems and structures in support of continuous improvement relates to changes in leadership and directions.

Western cultures love the dynamic leader that comes into a situation and immediately shakes things up. They establish their position through their dynamic personality and their ability to resolve problems and influence the people in their organization.

While these leaders are highly sought out and are able to create dramatic improvements in a short period of time. Their legacies, unfortunately, tend to be short lived, and their organizations tend to slip back shortly after their tenure ends.

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Jim Collins in Good to Great, (Collins 2001) identified five levels of leadership, and attributed Level 5 Leadership to those organizations that had sustainable greatness.



One of the key attributes of a Level 5 Leader is that he or she creates systems and structures that are designed to promote continuous improvement and success, in spite of the personality dynamics of the Leader.

MainStream GS' systematic and disciplined approach is designed to establish embedded systems and structures within the organization that outlive the changes in Leadership that are inherent in organizations.

It takes an enlightened leadership to engage in this process of setting a long range strategic path, and transition to becoming a High Performance Organization. The role of the consulting organization is to provide a disciplined and consistent methodology, with individuals that are experts in both the technical elements of implementation and the organizational development and change management skills to guide an organization down this path to High Performance.

As Lean and Six Sigma practitioners we are passionate about eliminating waste and process variations. In doing so we create capacity, improve quality and establish reliable delivery. Along the way we create a passion for excellence in organizations. Focusing an organization on defining a common mission, and establishing their vision for the future; helping them understand the potential barriers to success (both technical and cultural) and providing them

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with a proven methodology that aligns the resources of the organization in order to overcome those barriers, enables us to transition their Lean and Six Sigma capabilities from being tactical tools into being strategic enablers.

In the purest sense of Lean, it eliminates waste within Lean implementation, prevents sub-optimization, and avoids over processing. It also provides a clear return on investment at the highest levels of the organization. It is that lack of clear return on investment that has derailed most organizations in their Lean / Six Sigma journey.

As noted, raising the bar forces us to look at an organization as a system designed to produce a desired output and focus the organization's efforts in a manner that optimizes its resources toward achieving its desired outcome. In short, it creates a High Performance Organization.

For more information regarding MainStream GS, contact Tom Cluley, Chief Operations Partner, MainStream GS, (856) 296-1144; tom.cluley@mainstreamgs.com. Please visit our website at www.mainstreamgs.com.

ⁱ This is a popular adaptation of Change Adaptation similar in nature to that developed by Everett Rodgers (1962) *Diffusion of Innovation*. But it differs substantially in its presentation. The origins of this curve model are unknown.

ⁱⁱ Adapted from 4 Stages of Competence, Origins Unknown but promoted by US Gordon Training International

ⁱⁱⁱ SWOT Credited to Albert Humphrey, who led a convention at Stanford University in the 1960s and 1970s

^{iv} STEEP Origins Unknown - an acronym for Social, Technological, Economic, Environmental, Political. These are External factors to be addressed in Strategic Planning

^v *Good To Great* by Jim Collins, New York: Harper Collins; 2001

^{vi} *Leading Change*, by John P. Kotter, Harvard Business Publishing; 1996

^{vii} Akao, Yoji, ed (Jap: 1988, Eng: 1991) (in English(tr. from Japanese)). *Hoshin Kanri, policy deployment for successful TQM*. New York: Productivity Press (Originally Japanese Standards Association). pp. xiii.