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A story about changing a workplace
culture while streamlining work processes

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Manitoba Labour and Immigration's Provincial Nominee Program (PNP) was experiencing some challenges: The program's inventory had grown to approximately 6,000 applications, making processing difficult and inefficient. Staff tended to work in silos and morale was not as high as it once had been. "We needed to implement changes to our service model," explains Assistant Deputy Minister Ben Rempel.

Time was of the essence. Stakeholders needed to see results within less than one calendar year. Ben knew internal resources alone could not achieve his three essential objectives: Reduce the inventory. Increase efficiencies while maintaining existing quality of decision making. Improve staff morale. And all this while continuing to focus on the daily work of processing applications from prospective immigrants who want to make Manitoba their new home.

Ben turned to Protegra, a business performance and technology consulting company that was up for the complex challenge of significant performance improvement goals, skeptical employees, expectant stakeholders, and a tight timeline.

The short story is they succeeded on every front. The longer story is how they did it.

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CLIENT CONTEXT

Manitoba's Provincial Nominee Program is the largest and fastest-growing in the country, a fact that translates into pressure on staff and processes. Piloted in 1998, the PNP has become a marquee program for the province and an established pillar of Manitoba's economic development strategy. It has ambitious targets to meet: Between 2003 and 2006, the goal was to bring in 10,000 immigrants annually to Manitoba. That goal was met, and a new target was established. By 2016, 20,000 immigrants are to be brought to Manitoba every year. "We need to be creative and innovative in responding to our stakeholders' needs," says Ben Rempel, Assistant Deputy Minister of Manitoba Labour and Immigration.

By 2007/08, the inventory of applications to be processed had exceeded the Branch's ability to consistently meet its service levels. It was taking as long as one year to process a file – compared to the target of just three months – and the decision-making process was not consistent. Immigration Program Officers were spending all their time reviewing files, instead of splitting their attention 60/40 on application reviews and other program areas. "This work cannot be just about moving paper," says Ben. "Staff must consistently remember that their decisions affect real people and real lives." Given that 75% of the office staff are immigrants themselves, the import of their daily work is ever present to them – they know how life-changing their decisions can be.

The pressure of the mounting inventory affected staff satisfaction and morale, and the program was at risk of slipping from its premier position among nominee programs across Canada. Simply doubling staff resources to manage the file inventory was not an option (no budget for that). Speeding up processing

time but reducing the quality of decision making was no solution. "Yes, we needed to be making faster decisions," explains Ben, "but those decisions could not be poor ones. Ideally, each decision is an informed, weighted judgment, not the individualized opinion of one Immigration Program Officer." Ben knew it was time for a redesign, and he knew he couldn't pull it off from within. He had managed a successful redesign back in 2004 using only internal resources, but the challenges by late 2008 were too big to tackle this way. Political stakeholders were keen for the issues to be resolved, and pressure existed to deal with them sooner rather than later. So, in May 2009, Ben opened discussions with Dan Perron of Protegra, with whom he had recently completed a broader re-design of the immigrant skills and job matching services in Manitoba. The PNP is the key front-end selection process and contributes directly to the success of these services.

Dan's mantra, "You have to slow down to speed up," made sense to Ben. He believed that productive change would not come without significant analysis (and re-design) of the current state, and he was confident that the outside perspective Protegra would bring to the project would help make clear what wasn't working – and why. Ben was also confident that Protegra's approach would provide action, focus and coaching to deal with the findings of the analysis, allowing the organization to achieve its aggressive target. Sustaining the results would also be a key to success, once the target was reached.

Ben and Dan reached an agreement, setting March 31st, 2010 as the project's deadline. Tight? Yes. Doable? Yes – if everyone could be motivated to pull together.

LEAN PRINCIPLES. OPEN COMMUNICATION.



Dan Perron, Practice Leader/Business Performance Consulting with Protegra, is a proponent of Lean principles. First applied in the manufacturing sector by Henry Ford as early as 1913 (Toyota is the most famous company for implementing them), they have significant application in service delivery situations such as the PNP.

The 5 Lean principles as defined by Womack and Jones in Lean Thinking are:

1. Value (a focus on value for the organization's customer)
2. Value Stream (seeing, measuring and managing the activities that are required to deliver the expected value)
3. Flow (no bottlenecks, no unnecessary return loops or waiting, etc.)
4. Pull (the output is driven by customer demand and the capacity of the next process downstream to use the output), and
5. Perfection (do things right the first time, every time)

More importantly, from Protegra's perspective, a Lean organization is described as:

- Focused on value for the customer and the relentless elimination of waste
- Employees are the main engine of improvements and value delivery through problem solving and rigorous execution of the Plan – Do – Check – Act (Deming's P-D-C-A) cycle
- A culture of respect at every level

A hallmark of the Lean approach is up-front observation, measurement and analysis, and Protegra takes this step seriously. "In the early days of my involvement, I spent a lot of time doing side-by-side observation of individuals as they worked," says a Protegra consultant who worked closely with the PNP staff. "We

took each existing objective and process from the macro (ex. review a file) down to the micro level (ex. itemize the specific steps and stages involved in reviewing a file). This is a crucial step and helps build trust, because you've actually walked in their shoes, as it were. We also gathered baseline data by questioning and measuring to understand how long it takes to process an application. We then used this information to propose new norms of operating."

While Lean principles as a concept made sense to PNP staff, they admit to being resistant to its implementation in their program. "It was difficult in the beginning," says Matthias Rust, whose comments represent the 16 Immigration Program Officers in the department. "We're not mass producing products. We're dealing with lives here, and we were comfortable with the way we did things. There was some skepticism, for sure." Karmel Chartrand, Manager of Operations for PNP, echoes this sentiment: "An issue for us was trying to compare our processes with those in manufacturing. The piecework analogy was not readily accepted by staff."

Nonetheless, Ben gave Protegra full leadership support to apply the principles, as he was confident they would enable increased productivity levels, improved customer service and greater operational efficiency. He knew there was no silver bullet for the challenges being faced and he knew that Protegra couldn't – indeed, mustn't – come in with a pre-packaged solution. "It couldn't be externally imposed," he says. "We had to help create the solution together."

The staff's initial reluctance did not magically evaporate. It took time, consistent communication and everyone working

together, says Fanny Levy, Acting Director of the PNP Branch, who joined the project six months in on her return from maternity leave. “We talked a lot and learned a lot,” she explains. “We found concrete examples of how the Lean processes *could* work for us. Protegra presented a menu of options; we took some and left others. Everyone was part of the decisions.”

This open communication style was critical to the overall success of the project. Issues were brought out into the open for general discussion, with Fanny leading the way: “Everyone went through stages,” she explains. “First, accepting Protegra. Then, implementing changes. Then overcoming feelings of anger

and shock at what was being asked of them. I talked one-on-one with employees, building relationships and working to understand everyone’s situation. I had many conversations in the hallway! If someone made a face in a meeting, I would follow up and ask them what’s up? What are your thoughts about this decision? I went with my intuition, my gut.” The management team (Director, Operations Manager and Senior Program Officer) had weekly meetings to discuss issues and monitor progress.

Protegra provided formal channels of communication through an electronic newsletter and monthly face-to-face meetings with the full department.

FROM SILOS TO TEAMS



One of Ben's critical objectives was to move the office out of a silo work mode (individual officers working on files and solving problems on their own) and into a team-based operation (greater communication and consultation between officers). He knew that this would require changing how the work was done.

To allow staff to experiment with a team-based approach – a key re-design element, Protegra conducted a half-day workshop where staff were assembled in teams and assigned a task. First time round, the teams were timed. Then, everyone debriefed on the experience and discussed how they could have worked together differently to improve their time – the crucial practice of “reflection” or “slowing down to speed up”. Second time round, all teams achieved impressive performance improvements and, thus, reduced their time because they were able to overcome factors that got in the way on the first attempt. “This was hands-on, fun and gave us immediate results,” remembers Matthias, “and it provided the basic premise for the changes we were making in our processes and our work environment.” The benefits of working together as an overall team were evident to everyone.

Back at the office, with Protegra's assistance, management reorganized the PNP staff into four teams of four, each with its own targets and charged with identifying and solving its own problems before escalating them to management. Daily 15-minute stand-up meetings were introduced: Each team met first thing for 15 minutes and, as the name suggests, everyone remained standing – no sitting allowed.

This move from individual work to teamwork was a “huge” culture change for the staff, says Fanny, and, while stand-ups have not

necessarily been maintained rigorously by every team to this day, the essence is still employed by everyone: “If there's a problem, it's discussed by the team first, and only brought to the manager once a solution is selected, or sometimes if the team can't resolve it on their own,” explains Karmel.

Both Karmel and Fanny pay tribute to each and every PNP staff member for their willingness to embrace this approach and to move away from a more individualized perspective to a new and explicit team environment. The collective commitment within the department to collaborating and trying new ways of doing things began to feel more natural. But ever present through the analysis, the training and the daily work, was the deadline of March 31st, 2010 – looming as the point of success or failure.

“It was never certain that we would meet the deadline until the very last week,” remembers Ben. “And what got us there was teamwork. The teams never lost sight of the target, owned the problems they encountered along the way, and they owned the responsibility for finding the solutions. Over December/January, there weren't a lot of believers. Over February, more believers came on board, and then more and more staff began to understand that we could do this by adapting and modifying processes and how we behaved along the way, and by eliminating non-value-add steps.”

Reducing the inventory by March 31st “meant a lot of hard work,” remembers Karmel, “but there was an end in sight. We adjusted other projects to free up more time for this one. We didn't undertake any learning or training. It was just heads-down work to get through the inventory.” Collective and individual productivity performance was calculated on a

daily basis and communicated to everyone on visual charts. This created very short feedback loops, allowing teams and individuals to learn and adjust in real-time. The teams learned to adapt: “You must be willing to be flexible, to push back at times, and to change along the way,” says Karmel. The management team

pitched in and processed files to help meet the deadline – another concrete example of how every single person in the department played a crucial role in helping to bring the project to success. “There are no individual heroes in this story,” says Fanny. “It was an overall team effort with everyone pulling their own weight.”

MORALE & MOTIVATION



As the deadline approached, Ben says the teams really started owning the objective and the result. “I didn’t crack the whip,” he says. “I can’t give bonuses or additional vacation. In the public sector, you can only rely on people’s love of the work. And people came to understand that their work life would improve, that they would be able to be more client responsive, if they were successful in reducing the inventory by the deadline.” Reducing the effort required to process applications meant that staff could anticipate a greater variety in their assignments and more challenges. This was at the heart of the positive reinforcement aspect and motivation so critical to the success and sustainability of the results.

Matthias concurs. “We knew that the workload would decrease once we met the deadline of March 31st, and that was a real motivator. Once we got there, we would have to spend less time processing files to meet our ongoing commitments than we were needing to process to meet the deadline. It would not be just more of the same; there was an end in sight.”

Having the end in sight is critical, says Protegra’s Dan Perron. The increased workload for staff must be managed as a project rather than an endless ongoing process. To achieve this, targets must be established; schedules must be created, managed, reported on and

adjusted as the project evolves. Data must be gathered, measured and shared to ensure progress is being made on the appropriate objectives. “Data is objective,” explains Dan, “not subjective like people’s memory or opinions can be.”

Over time, individual resistance and skepticism was transformed into a general belief that the project would, in fact, reduce the inventory, improve work processes, result in more consistent decisions, and achieve the objective. The reward for staff? “Everyone wanted more variety in their work, with greater opportunities than ‘just’ processing files,” says Fanny. So, she listed on flipchart sheets the planned improvement projects that people would be able to work on once the deadline was met. She displayed the sheets in the hallway and asked every employee to write their name under the projects they wanted to work on. Some were pending projects that had been around “forever”, Fanny says, others were long-term improvement projects that spawned from the re-design but hadn’t been addressed yet. Everyone signed up for three projects and now “I have to make it happen for everyone!” she says, laughing. Work on the projects is contingent on meeting assigned productivity targets and viewed by most of the staff as one of the positive reinforcement mechanisms.



RESULTS

Everyone agrees that all the hard work was worth it: The deadline was met. The inventory was reduced. Stakeholders are pleased. Employees are happy.

From Ben's perspective it's a healthier workplace: "The project has rekindled the staff's love of their work. It's now team based and project based. They have defined objectives that are measured and evaluated, and there is good interchange in the whole division."

Karmel says she learned new skills along the way (problem solving and project management to name just two). "We have more variety in our work and we have more time. We can stay on top of things and we have the tools to implement new processes, some of which are now formalized while before they were 'just done'. We're more transparent. Our Value Management System – a recently deployed quality system – is more known: This is *who* we are. This is *what* we do. This is *how* we do it. This is *why* we do it. And we have a document management system in place: We work on one file at a time. We update all information

in a systematized way. And we have control systems in place."

Being pushed out of her comfort zone was valuable for Fanny. "It was an interesting experience, and I learned a lot about myself," she says. "I didn't know I could do it. It was hard, but good. We're still learning, of course. It's not something you learn overnight." Indeed, learning is a lifelong journey.

For Matthias, the standardized processes made for easier decision making: "It was not as clear before. Now we rely less on individual discretion and are more consistent, transparent and equitable in how we review files and make decisions. It's a lot nicer to work here now. We have greater variety in the work due to Protegra's processes, and we do a lot more than 'just' processing files all day. Our concern going in was that the quality of our work would suffer, but we are probably four times faster than we used to be." In fact, it is generally felt in the Branch that the overall quality of the decision-making process has actually improved.

RECOMMENDATIONS FOR BEST PRACTICES



From PNP

Ben Rempel,
Assistant Deputy
Minister, MB
Labour and
Immigration

- Start with the problem. Know what that is. Then fix that.
- Get the shop floor involved in the thinking process.
- Set achievable objectives.
- Believe – and demonstrate – that change is good, possible and fun.

Fanny Levy,
Acting Director,
PNP

- Communicate your values to Protegra. Set boundaries about how far you're prepared to go. Be clear about what you won't compromise about, because compromises are necessary along the way. Draw those lines clearly.
- Communicate a lot with Protegra. Go back and forth and discover the language that works for you, for your employees. Protegra is so open. Nothing we said to them was taken personally.
- Lots of communication is important. Keep it fluid within your management team – discuss everything and change plans as needed.
- Set realistic expectations: Not every employee will buy into the process readily and you cannot necessarily solve every person's problem.

Karmel
Chartrand,
Manager of
Operations, PNP

- Understand what the problem is and what the objective is: For us, we couldn't sacrifice quality for quantity. We had to maintain focus on both to succeed.
- Understand the overall process.
- Keep the big picture in view.

Matthias Rust,
Immigration
Program Officer,
PNP

- Give it a shot. Don't be too critical. Think outside the box.
- Do the work and, at the same time, think about how you're doing the work.
- During the process itself, it's not all fun and games. Have patience. Change is gradual.

From Protegra

- Get buy-in from every stakeholder, so that everyone owns the goal.
- Create a sense of urgency early on.
- Communicate. Communicate. Communicate.
- Listen. Listen. Listen.
- Recognize that some people are afraid to move out of their comfort zone. They need additional support.
- Senior managers must be visible and take ownership for coaching and motivating staff.
- Measure and report on progress. Invite staff to present progress reports to senior management.
- Establish clear go/no-go decision points.
- Encourage staff to be accountable and to influence decisions.
- Rigour is your friend: Introduce it where it doesn't exist. Improve it where it is inadequate.

NEXT STEPS

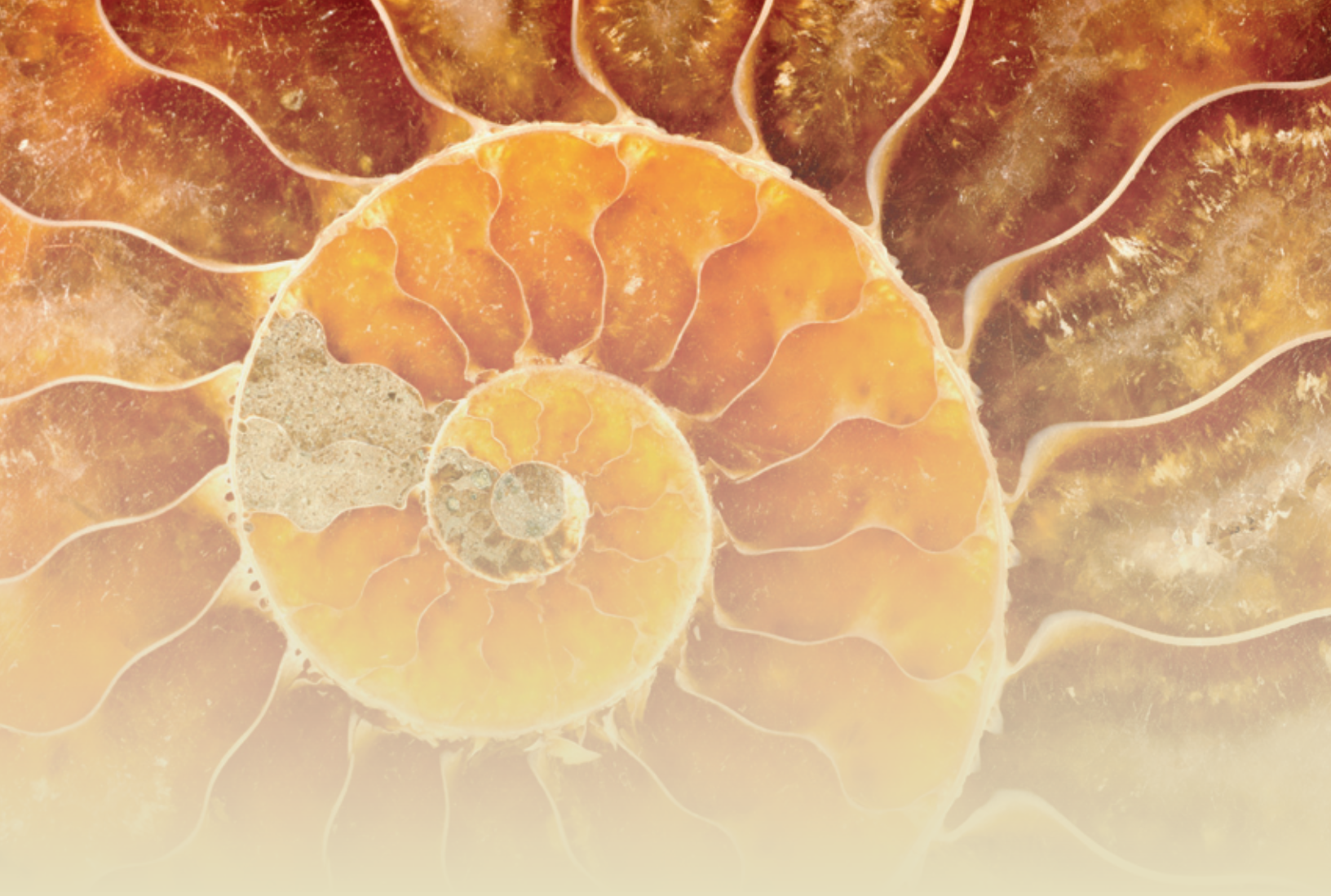


Protegra, whose staff was regularly on site at the PNP office, brought a lot of positive energy to their work and training, say the staff. “We needed to introduce innovation into our work and processes,” says Ben, “and we needed sustained external input to shift our thinking. I liked the overall approach Protegra took, because we needed new ways of thinking and new systems needed to be built. It was a lot of hard work to continually step back, think and reconsider. Protegra involved our staff in the analysis, solutions and decisions. I haven’t seen a group work so hard ever before. Protegra

helped us maintain momentum and morale, and there was clearly a purpose to all the hard work.”

“We could not have achieved our objective without Protegra,” says Fanny. “Their objectivity was key. The challenge now is for PNP to follow through and continue with the new approach.”

The final word goes to Ben: “I have no hesitation in recommending Protegra to others,” he says.



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