

Personal Operations Management

Lean Principles for Getting Good Things Done

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Introduction

- Problems in a clinic?
- Problems in a factory?
- Problems in someone's life?
- Problems in YOUR life?

Introduction

Poor personal
operations
management

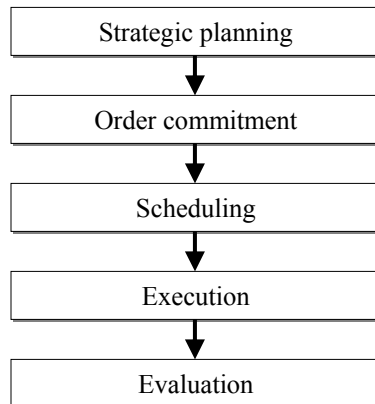
Problems ...

- Do the wrong things
- Break promises
- Disappoint others
- Damaged personal brand
- Little success at work
- Little success at home
- Do not achieve your goals
- Stress – Worry – Guilt

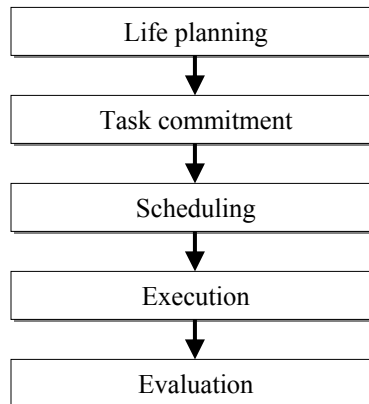
Failure (health, home, work)

Introduction

Factory Operations Management Process



Personal Operations Management Process



Outline

- Introduction
- Life planning
- Task commitment
- Scheduling
- Execution
- Evaluation
- Conclusions

Life planning

The life purpose principle

- Write-it down your answers to the life purpose questions:
 - What will be the center of my life?
 - What will be the character of my life?
 - What will be the contribution of my life?
 - What will be the communication of my life?
 - What will be the community of my life?



Warren, Rick (2002). *The Purpose Driven Life*.

Life planning

The purpose/goals/projects principle

Dimension	Purpose	Goals	Projects
Spiritual			
Mind			
Body			
Relationships			
Service			
Work			
Finances			

Purpose: Long-term, character-related, being rather than doing, not directly measurable

Goals: Specific, measurable, achievable, results-oriented, and time specific (SMART)

Projects: Activities required to help you achieve your goals.

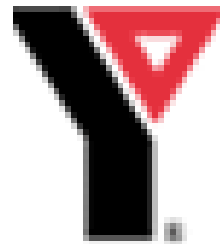
Tasks: Detailed activities required to accomplish a project.

Life planning

The balanced life principle

- Take care of your body.
- Take care of your spirit.
- Take care of your mind.

- Watch out for warning signs.



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Task commitment

The margins principle

- How many hours in each day?
 - Am I overloaded?
 - Keep safety capacity.
 - Use the pi rule ($\pi \approx 3.14$).
 - Say “I will get back to you.”
 - Ask what will I give up to do this?
 - How does this fit with my goals?
 - Coordination cost.
 - Lean thinking = Simple
-
- Margins = My load/capacity balance



Task commitment

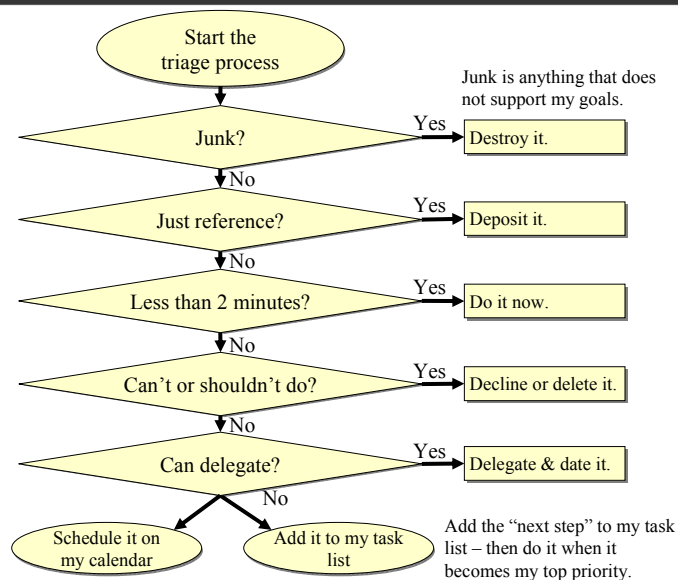
The boundaries principle

- Do you do your neighbor's lawn?
- Am I doing work that others should do?
- Clear boundaries at work and home?
- Clarify responsibilities.
- Use the RACI matrix.
- Do not feel guilt that is not yours.
- Help others develop responsibility.
- Boundaries = My responsibilities



Task commitment

The triage principle



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Scheduling

The calendar principle

- “Scheduled pushes out the unscheduled.”
- Prior planning prevents painfully poor performance
- 100% utilization is 100% crazy
- Most important tasks/projects are scheduled first

Factors

- Type of work → Time of day – biological primetime
- Time required → Time available
- Deadline required → Time available
- Location required → Location available
- People required → People available
- Resources required → Resources available

Scheduling

The task list principle

- Record only the “next actionable step” for each task.
- Ideally, the next step is a small step.
- The “next step” often gets you 80% of the value.

Task list sort keys

- Priority
- Category (\$, buy, consulting, family, self, service, teaching)
- Context (Anywhere, Call, Computer, Errands, Home, Office)
- Task/Next step
- Time
- start date
- due date
- Delegate

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Execution

The lean thinking principles

- Simple
- Visible
- Error-proof
- Wasteless
- Standard

Execution

The simple principle

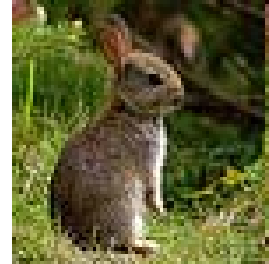
Example: Crash cart at Park Nicollet
Medical Center



Execution

The simple principle (continued)

- Do you always do the right thing first?
- Do not chase rabbits.
- Do allow the urgent to win over the important.
- Have one calendar and one task list.



Execution

The simple principle (continued)

- What is the average time between interruptions?
- What is the average time to recover from an interruption?
- What is the source of your interruptions?
- Use the two second rule – quickly write it down and stay focused.
- Analyze and stop the interruptions.
- Find a quiet place to work.
- Turn off e-mail notification
- Manage time thieves.
- Take breaks.



Execution

The visible principle

- We use a little glass in our dishwasher to indicate when the dishes have been washed.



Execution

The visible principle (continued)

- How many emails do you have?
- How many data items can you store in your brain at one time?
- The email challenge.

Execution

The error-proof principle

- I always keep my keys, wallet, and watch in a box on my desk so I know where to find them when I go to work.



Execution

The wasteless principle

- How much junk email do you get per day?
- Spend time to stop the flow.
- Unsubscribe from reputable mailing lists.
- Reduce the number of e-mails you write.
- Reduce the number of people you copy.
- Set up filters to keep out junk.
- Write short emails.
- Do not copy others on emails unless it is really necessary.



Execution

The wasteless principle (continued)

- How many times do you open and close an email?
- How many emails do you have in your email in-box?
- How much paper do you have on your desk or in your work area?
- The handle it once – not twice.
- Open it once and decide.



Execution

The wasteless principle (continued)

- Do you have piles of paper in your workarea?
- Does it take more than 5 seconds to find something you need?
- Create a good filing system.
- File it now.
- Use the file pile.



Execution

The wasteless principle (continued)

- How often do you check your e-mail?
- Do you check your e-mail the first thing in the morning?
- When was the last time you got to zero emails in your in-box?
- Process each e-mail when you open it.
- Immediately file reference e-mails.
- Get your email in-box down to zero at least once per week.



Execution

The wasteless principle (continued)

- Shaving kit in my roller bag.
- Setup time reduction.
- Stored work.



Execution

The standard principle

Our family keeps a large basket of **standard** white socks in our laundry room.



Execution

The standard principle (continued)

I have a standard place to keep my shoes in our closet so that I can always find them easily.



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Evaluation

Post project review principle

Tasks → Projects → Goals → Purpose

The scheduled review principle

- Review daily → Tasks
- Review weekly → Projects
- Review monthly → Goals
- Review annually → Purpose

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Conclusions

Personal Operations

Management Process

Life planning

The life purpose principle
The purpose/goals/projects principle
The balanced life principle

Task commitment

The margins principle
The boundaries principle
The triage principle

Scheduling

The calendar principle
The task list principle
The triage principle

Execution

The simple principle
The visible principle
The wasteless principle
The error proof principle
The standard principle

Evaluation

Post project review principle
Schedule review principle


Basic rules

- The 2 second rule
- The 2 minute rule
- The pi rule

Conclusions

Benefits of good personal operations management ...

- Do the right things
- Meet promises
- Not disappoint others
- Strong personal brand
- Good success at work
- Good success at home
- Achieve your goals
- Little stress, worry, or guilt



Success (health, home, work)