



## **LEAN CASE STUDY:**

### **TEAMWORK DRIVES LEAN TRANSFORMATION AT CARLETON UNIVERSITY**

When it comes to going “Lean,” Carleton University gets the gold star.

Recently, the university hosted two successful pilot projects using the Lean formula – which promotes reducing waste through restructuring processes – that led to immediate improvements in two departments.

The projects were conducted in the Graphic Services and Admissions departments and have resulted in improvements to service delivery and how employees conduct their daily business.

For Graphic Services Acting Print Shop Co-ordinator Jason Anderson, the key to the success was that suggestions for change came directly from staff instead of from the top down. It represented engagement and service excellence in its truest form, he says.

“For us it’s about running more efficiently and increasing our production,” says Anderson.

“We had great results with it. It was tough at the beginning ... but once the staff realized we wanted their input, the improvement was immediate.”

In a few short weeks, improvements by the Graphic Services team led to a 10 per cent productivity improvement for the 16-person group. As well, using a new approach known as 5S - a Lean tool - helped clear up 300 square feet of floor space, creating an environment that is pleasing and impressive for customers and employees alike.

“There was a little bit of theory,” says Anderson, “but I think the good thing about it was how fast-acting it is. You get results right away.

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“It gives us the time to put aside the day-to-day operations and look at ourselves and how we do business.”

The concept of the 5S refers to: Sort – through the work area removing unnecessary items; Set in Order – arranging necessary items for easy and efficient access; Shine - cleanliness and workplace appearance; Standardize – create guidelines for keeping areas organized, orderly, clean and visual; and Sustain - ingraining the 5Ss into the culture maintaining the standards. The 5S approach can translate into reduced set-up times; reduced processing times; increased floor space; lower safety incident/accident rates; reduced waste and better equipment reliability. The Lean project was brought to Carleton by the Lean Advisors (Lean AdvisorsInc.). One of the challenges, says Lean Senior Consultant Chris Stoddart, is encouraging participants to create environments in which staff feel they can provide input.

Stoddart and his colleagues tailored Lean concepts specifically for Carleton. According to Lean AdvisorsPresident Larry Coté, the moment at which Lean concepts are introduced is critical.

“Our job is to change the way people think and get them excited about what they are capable of doing,” says Coté. “They need to learn the proper methodology as it is integral to effectively transforming their environment.”

The success of the two pilots at Carleton can be attributed to the high level of staff engagement, says Cindy Taylor, associate director of Carleton’s Office of Quality Initiatives.

“These two pilot projects demonstrated how important grassroots participation is and how it can lead to real results,” says Taylor. “We were able to see, first-hand, how much pride staff took in their work and how committed they are to providing service excellence.”

The second Lean pilot project took place in Carleton’s Admissions Services, which processes some 30,000 applications annually. For staff, it is critical that applications are dealt with in a timely manner.

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“We started by going out to the staff with: ‘What bugs you the most?’ kinds of questions,” says Jackie Carberry, leader of the admissions project. “We knew that in our current state, files were often not easily retrievable when we needed them.”

Staff could be caught without a file when a student or parent called.

“Files were sometimes found in many different cubicles because there was no tracking system,” explains Carberry.

“We had never thought about really mapping out the way we walk around the office, the number of steps to a printer, the number of steps it is to go downstairs to retrieve a file jacket and timing those actions.

“Normally, when we think of solutions in an administrative environment, we’re looking at a system or process or software enhancements.”

She credited the 5S approach as having the biggest impact in her department because it provided simple solutions with a small overall price tag.

“Results were immediate,” adds Janice O’Farrell, director of Admissions. “The implemented changes greatly enhanced our customer service so that when an applicant made an inquiry, there was no delay in retrieving their file and offering assistance.”

The improvements have already been noted by students, parents and colleagues on campus and the Admissions Lean Team won a Carleton Service Excellence award for its efforts.

“Our offers of admission were out sooner, acknowledgements to students were out sooner, so we gained some great efficiencies from it,” says O’Farrell, of the positive impacts of Lean.

Most importantly staff members were at the centre of the changes.

“They evaluated the existing process on their own. They mapped out what they thought the new process should look like and the areas to tackle, and then they presented that to me with

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some suggestions for implementation,” she adds.

“From a manager’s point of view, you have to be prepared to open the closet door to let people look inside and critique your processes.”

Like Anderson, O’Farrell says going through the Lean exercise led to incredible teamwork and a better understanding among staff about what their colleagues’ jobs entail. The initiative also resulted in concrete results that were visible – creating a great deal of satisfaction in the workplace.

“I think the most interesting part for me was to realize that little changes had this large impact,” she says. “I was quite impressed.”

O’Farrell and Anderson agree.

“The whole university should look at doing it. The value is there – it’s fantastic. This is an opportunity to change the way we do business,” says Anderson.

“It’s about everyone coming together and it worked.”