

White Paper

Drive an Oracle Implementation On Time and On Budget with Visual Management Methodology



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Abstract

Visual Management is an innovative methodology that uses simple tools and works on the concept of reconcile intent with activity. Using this technique, Emerson InSinkErator (world's largest manufacturer of food waste solutions), Infosys Limited (a global leader in IT and business consulting services) and ShiftGear (creator of Dynamic Work Design and its principles) have been able to drive a full-scale ERP implementation inducing a high level of user ownership. Get an insight into how they were able to successfully meet one milestone after the other by following a few simple 'visual' tasks and rules. In this session, you will see real life examples, best practices and tips to adopt this in similar engagements.



Business Overview

About InSinkErator®

InSinkErator is a business unit of Emerson Commercial and Residential Solutions. Headquartered in Racine, Wisconsin, it is the world's largest manufacturer of food waste disposers and instant hot water dispensers for home and commercial use. The very first food waste disposer was invented by InSinkErator in 1927. Over the past 90 years, InSinkErator® has grown from a small idea in Wisconsin into a global leader with operations in more than 80 countries. For additional information, please visit: www.insinkerator.com

Nature of Business

With multiple facilities in Southeast Wisconsin, InSinkErator is a high volume, high velocity, vertically integrated manufacturer. A global company, InSinkErator also has multiple sales and warehousing operations around the world and global distribution channels. The products have a very short customer expected lead time (CELT). Moreover, channel conflict drives price complexity.

InSinkErator has multiple geo-specific major product lines such as:

- Household food waste disposers
- Commercial food waste solutions
- Instant hot water dispensing products

Need for Transition to a Major ERP System

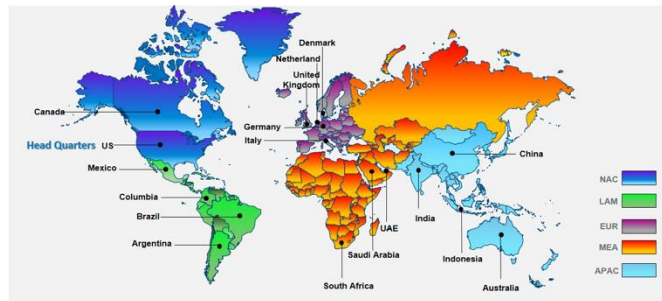
InSinkErator's current major ERP system is nearly 20 years old. Over those 20 years, InSinkErator's business has experienced significant growth in volume, velocity and complexity. This growth was typically dealt with through a growing number of 3rd party systems and manual, spreadsheet based workarounds. Global growth has also created an environment with multiple ERP systems and peripheral applications with limited to no integration.

The Oracle E-Business Suite implementation will allow InSinkErator to establish a new global integrated foundation for growth, as well as reduce internal waste and rework. This implementation will also allow for improved supply chain collaboration and make it easier for our customers to do business with. Further inventory accuracy will be improved through global visibility and a wide range of analytical capabilities offered by the Oracle solution being implemented.

Oracle Implementation at InSinkErator

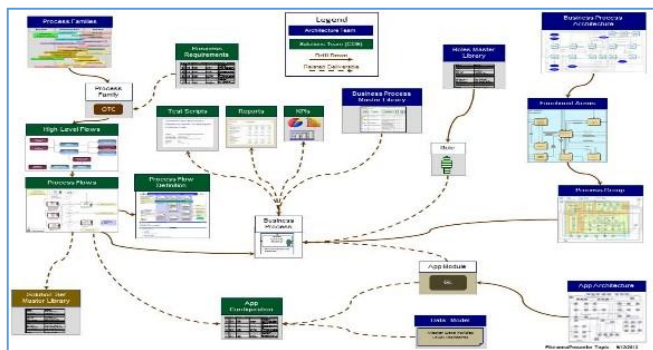
Oracle at Emerson Commercial and Residential Solutions

Oracle E-Business Suite is the primary ERP business system at Emerson Commercial and Residential Solutions. It is supported on a single global environment (Oracle instance) that is used across business units spanning multiple geographies. The system is operational for close to 10 years now and was recently upgraded to one of the latest versions of Oracle EBS (12.2.4).



A large number of common / shared objects is typically present on such single global instances. Therefore, any new site going live needs to take cognizance of the impact of their solutions on other business units that are already a part of the instance. Due to the varied nature of products and processes companies within Emerson Commercial and Residential Solutions (COMRES) conglomerate, including InSinkErator, the process of introducing a new business to this Oracle instance becomes even more challenging. Please note that owing to such high variability factors, in no way this can be perceived as 'just another rollout'.

It is absolutely critical that any change being introduced through an Oracle implementation project supports and sustains the integrity of this single global instance. Therefore, COMRES has come up with a repository of pre-defined implementation standards and solution sets, which in turn have contributed to the maturity of the Oracle environment. Additionally, a formal governance mechanism has been established through CoE (Centre of Excellence), Architecture and Technical teams.



These solution sets are a combination of, but not limited to, the following:

- Process flows with enterprise roles
- Naming conventions
- Configuration standards
- Out-of-the box features
- Custom solutions
- Documentation formats
- Technical code repository
- Tools and templates

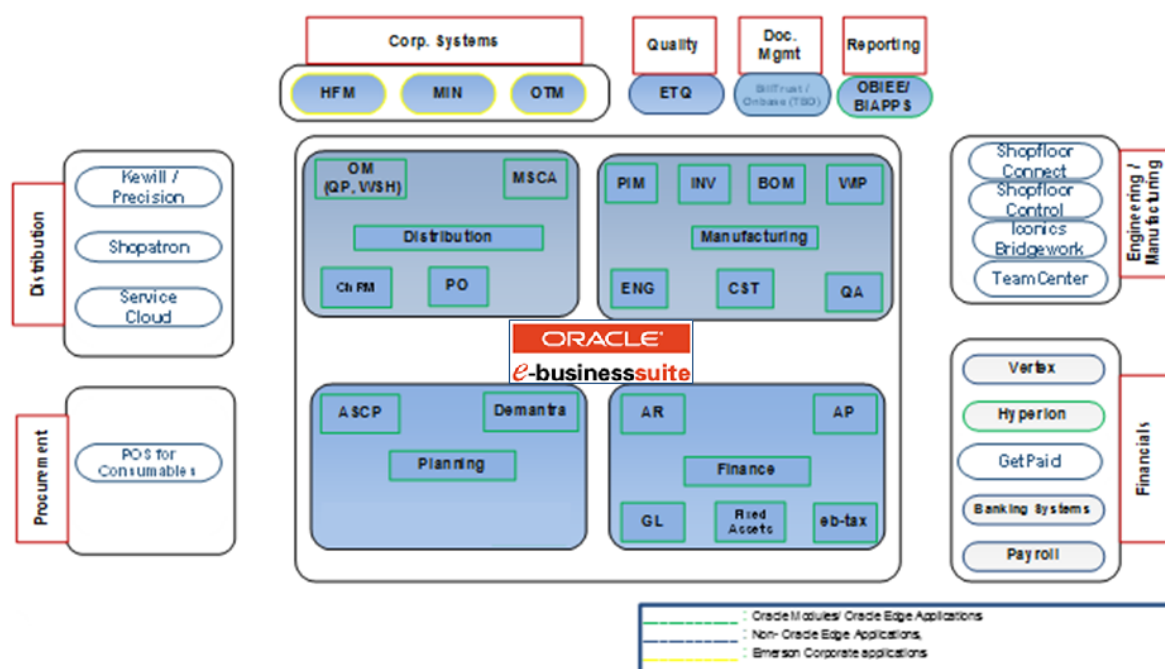
Such artifacts have been developed and maintained in each functional area. They are tightly integrated based on relevance and dependency. The project team of each new business unit coming aboard COMRES's global Oracle instance needs to prepare their implementation plan taking into consideration these mandatory guidelines. Each 'gap' or deviation from existing solution sets is thoroughly vetted by governing bodies before it can be introduced to the Oracle environment. Consider this to be like a revolving door – if you push one side, the other three sides will also invariably start moving. So before pushing your side of the door, you need to check if any, or all, of those other three sides will hit someone else.

Additionally, each Oracle project needs to go through an 8 stage process, from concept to design to test to deploy. A specific set of exit criteria at each stage gate needs to be passed in order to get a 'Continue' vote from the gate keepers. Compliance to standards, numbers of customizations being put into play, key user readiness, criticality of open issues and outcome of a testing milestone are some of the several parameters against which the 'health' and readiness of a business unit to transition to Oracle is gauged during a typical stage gate meeting. The whole idea here is not to make the ride bumpy for 'new tenants' but to ensure it continues to be 'life as usual' for existing ones and also facilitate ease of maintenance of the single global instance in the long run.

Oracle Implementation Scope at InSinkErator

Nature of an Oracle implementation is determined by several parameters put together when the project is scoped. Here are few key metrics that give an idea of magnitude and complexity of the Oracle implementation project at InSinkErator. This coupled with the stringent processes put forth by single global instance (as explained earlier) makes the project even more challenging and interesting.

- Over 700 requirements gathered from business during initial discovery
- 25 distinct Oracle EBS modules to be implemented to meet these requirements
- 50 data entities to be converted from current legacy system to Oracle EBS
- Migration of 600,000+ data records (master + open transaction)
- Over 80 customizations, with more than 25% complex ones
- 15 Edge applications integrated with core Oracle EBS system
- 5 rigorous milestones testing cycles building up to the final solution
- 18-month duration project
- Going live on a global instance along with 3 other business units at the same time!



Oracle E-Business Suite Solution Landscape at InSinkErator

Origin of the Visual Management Concept

Visual Management has become a topic that more and more people in the improvement industry are interested in. Who has not heard the adage, “a picture is worth a thousand words”? As humans, visual cues and visual management are a natural part of the way we organize ourselves and solve problems. Replacing a 20-year old dishwasher at home with one of the newer, super quiet ones yields a good example. These machines are so quiet that it is hard to know when it is running. You have to laugh when you think about the first person to discover the problem that led the engineers put a small red light that shines down onto the floor when this super quiet machine is running as a visual cue to signal “please don’t open me!”

The “Visual Factory” has been a part of the lean movement for decades and the technique of using visual cues is integral to good 5S, pull and other Toyota Production System (TPS) and Lean tools. Kanban, the Japanese word for “order” makes requests for more product very tangible and visible, enabling a make-to-use, pull system.

In factories and other places, like a restaurant, where the work is physical, people who are working in the system have many visual cues (your order, your check, etc.) about the status of the work and what to do next. But when we move to the office area, it is hard to see the status of the work. Likely you’ve experienced the first indicator of the status of your work in the office areas as a report that shows up in a meeting, only after your boss has seen the bad news first. Toyota was one of the first that we know of to take on VM in a big way when they introduced it into its product development system during the Prius project in the 1990s. Certainly, in the Lean and Continuous Improvement community, where people were already focused on Toyota, TPS is the first place many people began to learn about formally applying Visual Management in the workplace.

One of the people inside Toyota who understands TPS and Visual Management deeply was Toshio Horikiri, CEO of Toyota Engineering Corporation. Mr. Horikiri designed 40 Toyota assembly plants in his 37-year career in Toyota. He then spent over a decade writing a TPS text book and creating the only school in the world that will certify you or your organization on the real TPS.

ShiftGear Partners Don Kieffer, a former VP at Harley-Davidson, and Nelson Repenning, an MIT Professor and Social Scientist, have been collaborating for over 20 years to both improve work and more deeply understand the principles and rules of improvement. They saw many (and were part of some) failed efforts of people taking improvement tools from physical work and trying to apply them to people doing intellectual work. Around the year 2000, Kieffer and Repenning, who had been focused on improvement efforts outside the factory, specifically in knowledge work, executive strategy, engineering, IT, and finance, ran into Mr. Horikiri and his VM work and immediately integrated it into their developing approach.

On a visit with him in Japan in February 2016. Over a beer (or two) they asked Mr. Horikiri and a colleague, Mr. Hiroki Sato, to give them a better translation of the meaning of the Japanese characters they use to describe visual management. Previously they had used “quicken visualization”. Quickening visualization is an awkward translation of the idea that if the work is well organized and visual in the factory, everything moves more quickly: product, problem solving, decision making, etc. Kieffer and Repenning gently pushed them to explain a bit more so that they could get a clearer understanding of how they thought about it.

The result of the discussion was written on a beer napkin shown below. The more nuanced meaning of the Japanese characters seems to be (remember we are civilians) that with some careful observation and study (“see, watch”) that we can make things that aren’t normally seen, visible so that we can better manage and organize them.



A little better translation of this idea into English is that if you study and understand the work more deeply, you can “make the invisible visible”. This is a bit more insightful than simply putting a Gantt chart on the wall.

ShiftGear Creates Dynamic Work Design

Over the 20 years Repenning and Kieffer have been working together with their “go fix it then understand why it worked” collaboration, 30% improvement became their starting point and minimum expectation. Not surprisingly, they found that visual management was a great method to operationalize the improvement methods they were using in the office areas. They saw these results in all kinds of non-factory work: DNA sequencing, executive strategy, engineering, surgical and intensive care functions in hospitals, casinos and, in this case, software installations like Oracle.

In addition, the theory and science piece advanced with, and aided, the field work. A few years ago, this piece of the work emerged as the Dynamic Work Design principles, that not only explained *why* TPS and Lean techniques worked, it allowed Kieffer and Repenning to approach intellectual work directly without having to go through long sessions of training on Lean and TPS tools and systems. It allowed them to assess what organizations were already doing well, explain why it was working and show them the next step to getting better results based on frameworks not toolsets. This method allowed companies to put most of their existing culture and language to use, but framing and guiding it with the principles of Dynamic Work Design:

- Reconcile Intent and Activity
- Use Structured Problem Solving
- Manage Optimal Challenge
- Connect the Human Chain

(For more explanation, please visit <http://shiftgear.work/principles-of-dynamic-work-design>)

Although visual management appears to be a relatively low-tech system of white boards and sticky notes, it creates a framework for and guides human interaction in producing high value work. At its best application, it wires existing people and technology into a very effective management system. This is why it does not replace the work of Infosys, Oracle, or InSinkErator...it is an accelerator of high quality work.

Reconcile Intent and Activity: Every organization, to some degree, is working on the same problem...be super clear on the targets and their underlying rationale (Intent) and then organize the most efficient set of human actions (Activity) to accomplish the task.

Use Structured Problem Solving: Everyone in the improvement business knows the value of structured problem solving and its roots in Deming. ShiftGear focuses not on a particular form of A3, DMAIC, etc., but on the underlying brain science that explains why these tools help us all solve problems with more rigor and innovation.

Manage Optimal Challenge: Every system has a natural capacity. When that system is overloaded it moves into crisis, when under loaded the built-in signals of the system don't function.

Connect the Human Chain: Misuse of email and technology reduces natural collaboration and does not leverage our deep experience to see and solve problems. We already know this. For example, when crisis happens, the approach is to get everyone together to figure out the solution. The movie Apollo 13 is the perfect example. Inherently, we seem to understand that we need to get the right people in the same room to solve a problem. However, in many, many places in today's organizations, we break this human chain of interaction in the name of productivity or process and just give people little pieces of work that is supposed to produce a good result. No process works without error, and breaking this human chain allows little problems to continue to move along the process undetected and become big problems. Connect the Human Chain shows up on Toyota's assembly line *after* the 'andon' cord is pulled: the immediate response is to bring people to the problem for quick resolution.

Visual Management is the tool that brings all the elements of Dynamic Work Design into play at one time. When done correctly, it is a powerful and engaging way to get the job done for the customer!

Visual Management for Oracle Implementation at InSinkErator

What Make Visual Management Different?

While most traditional project management tools will claim to offer many of the same benefits that we have experienced with Visual Management, I feel it is important to contrast the two approaches.

S. No.	Traditional PM Tools	Visual Management
1	Highly structured framework	Infinitely flexible
2	Specialized skill set required	So simple, anyone can do it
3	Very limited visibility	Intuitive
4	Investment in tools	Low cost of entry and ownership
5	Limited collaboration capabilities	Highly collaborative
6	Centralized ownership	Putting ownership where it belongs
7	Task delegation	Task ownership

1. While flexibility varies with software based project management tools, most are tied into a higher level structure, typically, that of a task list with various levels of attributes and rollups. Visual Management, by nature, has no pre-defined. It can be whatever you need it to be. And can be changed as needed to enable continuing improvement.
2. Expertise in software based project management tools often becomes a specialized skill obtained, to varying degree, by a few people within an organization. In contrast, after some initial training on the concepts, most people are comfortable being actively engaged in the process.
3. Software based tools typically require specialized reports to be distributed, reviewed, and presented to gain an understanding of project status. Countless books have been dedicated to this topic alone. With a well-designed Visual Management board, anyone can quickly determine if a project is in trouble or not.
4. Whiteboards and post-its have a much lower cost of ownership than most software packages.
5. One of the biggest benefits of Visual Management is the collaboration that occurs during the board meetings. Much of this collaboration is facilitated by having visibility to the entire project in one place.
6. While software tools have improved over the years, they still remain predominantly controlled by one, or a very few, people. A Visual Management board is owned by the team.
7. In traditional project management tools, it is common for a project manager to delegate tasks they believe need to be done. In a true Visual Management environment, the exact opposite is established where the project team is telling the project manager what they need to do in order to reach the desired state.

Getting Started

While Visual Management is intuitive in nature, like most things in life, a good start can make the process far more effective. To start out at InSinkErator, we engaged ShiftGear Work Design for 2 ½ days of training on Visual Management theories and practice. All members of the implementation team, as well as all consultants supporting the implementation were required to take part in the training. A half day sessions was also dedicated to setting scope with the InSinkErator Executive staff.

The last day of training was dedicated to our first pass at building out the Visual Management boards that would be used to get us to our first major project milestone, CRP1, scheduled three months out. While we all struggled at first to articulate tasks that would otherwise seem intuitive, within three weekly iterations of board meetings, the project team identified over 300 individual tasks through 7 track required to accomplish the 20 milestones provided by Infosys that we started with. As stated in an earlier section, the project team told us what needed to be done. Because of this, the InSinkErator project team truly owned the project.

Purpose of the Visual Management Boards

While the boards themselves can be very simple, a well-designed board will offer the following benefits:

- **Reconcile intent with activity.** Project leadership, through well-defined milestones, communicated the intent and desired results. From this, the project team then identifies the tasks that need to be completed to meet those desired results.
- **Make the invisible, visible.** The actual process of writing out a task, of articulating intent, can at times be challenging for team members. This communication of what may seem intuitive to one, will often stimulate conversation, ideas, and disagreement. Properly facilitated, this will lead to a better plan.
- **Do we have the right activities to achieve our intent?** The ability to see the entire plan, and how it relates to the plan milestones, will often help the team prioritize and delay “nice to have tasks” that may not be required to meet the current milestones. The ability to see view the entire plan has the added benefit of making a large scale plan seem less overwhelming.
- **Can we see issues?** Through the simple act of using different colored post-its to highlight issues and past due tasks, it is very easy to see when a track is in trouble and needs help. There is an important mindset change that needs to take place early on for this to be effective. Our project team is encouraged to identify and recognize past due tasks and issues as early as they can. This act results in more lead time to resolve issues or re-align resources.

Here is an example of an actual visual management board created during one of the phases of the Oracle implementation project at InSinkErator.



Visual Management Board with Project Tasks

The Meeting Process

A typical Visual Management meeting will last 1 to 1 ½ hours on a weekly cadence. Interestingly, as we progress through time and move closer to our goal, the meetings tend to get much shorter as the team becomes more in tune with what they need to do.

One key to better engagement is standing meetings. Not only does this enhance engagement with the board itself, but it also enhances collaboration, communication and understanding. One meeting can eliminate many, many, emails.

While the Visual Management process can provide powerful results, it is important to note that there is no replacement for leadership and facilitation skills



Standing Meeting in Front of the VM Board

Flexibility of Visual Management Process

In contrast to traditional project management tools, the Visual Management approach is extremely flexible. All you need is a clean whiteboard and lots of post-it notes. Some examples of this flexibility at InSinkErator include:

- IT Conversions Board.** At the start of our project, due to the volume of conversions, our IT team initially attempted to manage conversion detail through a spreadsheet. At that time, they made a request to push out timelines as the volume of conversions appeared overwhelming. Before any timeline decisions were made, we created a new conversions Visual Management board. This board allowed us to “see” the problem. With this new perspective, we were able to re-allocate resources, prioritize, and discuss contingency plans. This approach allowed us to make our original timeline.
- Channel Revenue Management board.** Midway through our implementation, through the Visual Management process, we realized we were falling behind in this specific area. Originally a part of our Order to Cash board, we were able to very quickly (hours) establish a new board and team. This shift in focus allowed us to get back on track within a few weeks.
- Team re-alignment.** After our second conference room pilot, we re-aligned our implementations teams moving from siloed tracks (Finance, Supply Chain, Order Management, etc....) to end to end tracks (Order to Cash, Procure to Pay, Supply Chain / Operations, etc....). In the world of Visual Management, all we needed to facilitate this level of changes was clean whiteboards and lots of post-it notes.

Presented here are couple of examples where design of the board was either re-designed or completely created afresh to better serve the intent. This change was adopted in almost no time and with no impact to project schedule. This shows the high degree of flexibility of visual management process!



Re-designed Main Board



IT Conversions Board

Visual Management Process - Creating a High-Performance Culture

As you might expect, there's a lot more going on than just writing tasks on sticky notes and putting them on a white board. Putting the right rules in place is critical to success.

Task Creation and Status

Many teams often start by working 'right to left.' Starting from the deadline working backwards, what are the major milestones that need to be accomplished to complete the project on time? Once these are populated, teams work 'left to right' filling in the tasks to meet the milestones. In the project at InSinkErator, the Infosys consultants provided critical guidance in helping the teams understand the activities required to meet the milestones. Once tasks are on the board, we employ simple cues to communicate the status of each task.

Format	Example	Task Started																		
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Warning! Publicly committing to a deadline is often an awkward and uncomfortable experience for newcomers. Why? First, many organizations and systems haven't required this level of individual detail in other projects. Second, and possibly more powerful, public commitments by your own hand and in your own words create a strong sense of ownership and responsibility to complete the task on time. It can be scary making these kinds of public commitments because this might mean I fail publicly as well. It's critical to coach participants that missing a deadline is not a signal that you're bad or incompetent. Rather, it's a deliberate design to find and fix problems and eliminate the temptation to 'bury' a problem in hopes of completing before it causes issues for the rest of the project.

Signals and Countermeasures

Visual Management boards should be live, dynamic tools that help focus attention and resources. For example, the pink 'delay' signals an issue and draws your attention. When the team meets in front of the board, they don't need to spend any time discussing tasks that are on track, they focus on the delays and issues. Task owners are expected to report on the following at each team meeting:

- What is the reason for the delay or issue?
- What are the planned countermeasures?
- What help is needed (if any)?
- When will it be resolved?
- What risks does this create for the entire project schedule?

Resolve Questions and Issues

We've all experienced it- an issue or question that seems to come up at every meeting but never gets solved. Why? Because nobody owns it and has committed to resolving it. Experienced VM users capture these questions and issues, post them on their boards, and keep them visible until resolved. Typically, teams will review task status first, then move on to resolving questions and issues.

Provide Quick Feedback

One of the most critical elements of job satisfaction relates to quick feedback. In an academic study of job satisfaction, the sense of 'making progress' was highly correlated with job satisfaction. We like and crave feedback. Depending on the type and application of the board, we often include simple metric charts with goal and actual clearly visible. In addition, many of our clients have come up with clever ways to visually demonstrate progress.



Progression of completed activities over approximately 3 years - Broad Institute, Cambridge, MA

Infosys' Oracle Program Management Point of View

VM for an Oracle Project?

When Infosys consultants were first introduced to the idea of Visual Management by InSinkErator and asked to adopt it for their Oracle implementation project, almost all of them had the same question in their mind – “Is this even possible?” This team of consultants, with an average experience of over 12 years per consultant successfully handling Oracle projects for a wide clientele, including other Emerson business units, had never come across a situation where an Oracle implementation was to be managed using Visual Management! Although initially in doubt and unsure of how to make this happen, they decided to embrace the idea with an open mind. Today, with little over a year into this process since it all started, all of them equivocally have the opinion – “We are so glad we chose to go on this path!”

Task on a VM Board v/s Project Plan / Excel Tracker

Let's talk about couple of integral parts of any major business transformation project, including an Oracle implementation - project plans and excel trackers. What happens to these tools when we use VM? Are they completely eliminated? The answer is 'No'. The difference on how these are used is significant though. Through this process, one can compress a 1000+ line project plan into a much shorter version (at a very high level) and still comfortably manage detailed tasks through VM. The key here is to break down each major milestone into sub-milestones (with dates), that are understandable by business / core team, and have them write tasks leading up to these sub-milestones on their VM boards. A good example of a sub-milestone can be 'master data review'. In this case, you need business to review the master data extracted from legacy and provide a sign-off to migrate it to Oracle. Ownership of each data entity lies with specific track and can involve multiple people with multiple tasks that can in turn be tracked through VM boards. Since, the number of data entities in scope in case of InSinkErator were 50, consultants still needed to maintain an excel tracker to monitor the overall status. The trick lies in where to draw the line – Task on VM board or Excel tracker?

The Infosys Board

Weekly cadence of VM meetings was established as explained in earlier sections. But as we progressed through the project, 'shift left' principle was seen to be taking effect. InSinkErator core team was able to manage Oracle tasks on the business side without continuous hand-holding by the consultants. Therefore, the direct involvement of Infosys consultants in these meetings were reduced to minimum. But about halfway down the project, an interesting observation surfaced. Due to multiple parties involved in this project, sometimes there is a gap in the feedback mechanism. For example, a user might request a solution from a consultant, which is doable, but needs a change to an existing solution. Therefore, it needs to be reviewed and approved by COMRES CoE/Architecture team. In this case, the InSinkErator user is waiting for a confirmation from the Infosys consultant. Note that this is just one example, but in reality there could be (rather there were) several others. This resulted in the Infosys VM board with following goal - “Close any feedback loop between InSinkErator core team and Infosys consultants.” This is yet another scenario that showcases flexibility of VM process.

Avoid Snow Plow Effect!

In a few Oracle implementation projects, you would see tasks piled up as we inch closer to any milestone, thereby creating what is called as a 'snow plow' effect. This results in longer working hours, pushing activities to next milestone, people scrambling to get things done, increased chances of issues caused by half-baked solutions being put in place due to lack of time, and many other undesirable situations. Such snow plow effect was avoided at InSinkEerator with a combination of:

- Starting with right set of milestones and sub-milestones, with the purpose of each clearly explained
- Using visual management to evenly distribute tasks and leading up to these milestones assigning them to the right people

Any ERP project is a building process and the journey can be made pleasant by adopting these simple methods as outlined above. The foundation of a successful Oracle implementation is laid when each phase is kicked-off with the deliverables and expectations from each stakeholder listed. "Begin with the end in mind", as Stephen Covey says in his best seller "7 Habits of Highly Effective People". Throw in visual management in the mix, and the results are mind-boggling. We compared the outcome of various Oracle project milestones (such as Conference Room Pilot, System Integrated Testing, etc.) at InSinkEerator vis-à-vis other similar projects and found InSinkEerator to be way ahead of the game. There was a lot more achieved in these milestones and the users were demonstrably more comfortable and confident with the new system / solution.

Another corollary to the process, that proved to be quite helpful in avoiding the snow plow effect, was writing down questions / requirements / changes reported by users while executing a milestone testing phase (such as CRP) on post-it notes. These, in turn, got converted into tasks on VM boards for the next milestone. So basically you have tasks identified even before the phase is started! These are learnings from InSinkEerator Oracle project. Remember, you can get as creative as it gets!



A real-life example of VM board showing no presence of snow plow effect

Value Proposition

A single, well facilitated, one-hour Visual Management meeting can eliminate countless emails and delays. Speed, flexibility, collaboration, and most importantly, putting ownership where it belongs, highlight the InSinkErator experience with Visual Management. Support for Visual Management represents about 1.5% of our total implementation budget. The smallest bucket is providing the biggest payback.

Also, it is well worth mentioning that this process is not just restricted to projects, but can be extended to any situation. One should just ask themselves the question – ‘What does your work look like?’, and then use this process to answer that question. For example, one can run staff meetings with this technique. Based on our experience with use of Visual Management for our Oracle implementation project, we can comfortably and confidently quote that this methodology reduces stress by making the process less overwhelming, especially with such large engagements.

Contact Information

We hope you enjoyed reading this white paper. Thank you for your time and attention! If you have any questions, please contact us at the following and we will be happy to answer:

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