

WHERE THE FLOW STOPS · CHAPTER SEVEN

# The Field Manual

*Twelve working pages, the run sheets, the walk sheet, the arithmetic and the agreement, ready to carry into a room.*

Ammanuel Santa Anna

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## THE LICENCE

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Chapter Seven of Where the Flow Stops. The whole book, with every chapter, is at business.hautelumiere.life/library/where-the-flow-stops (DOI https://doi.org/10.5281/zenodo.23989196).

## A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

## ABSTRACT

Twelve working pages, the run sheets, the walk sheet, the arithmetic and the agreement, ready to carry into a room. The chapters of this book describe five practices as people doing them. This chapter holds the working pages: the run sheets, the question sets, the worksheets and the one-page templates that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand, and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software. The pages follow the order of the first ninety days, not the order of the chapters. Each opens with a line saying where it comes from and when in the ninety days it is used. Where a page gives a script, the words are a starting point; say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

CHAPTER SEVEN

# The Field Manual

*Twelve working pages, the run sheets, the walk sheet, the arithmetic and the agreement, ready to carry into a room.*



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## How to use these pages

The chapters of this book describe five practices as people doing them.[43] This chapter holds the working pages: the run sheets, the question sets, the worksheets and the one-page templates that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand, and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software.

The pages follow the order of the first ninety days, not the order of the chapters. Each opens with a line saying where it comes from and when in the ninety days it is used. Where a page gives a script, the words are a starting point; say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

Two rules govern the whole manual. Write down what people said, not what you wish they had said. And answer everything you collect: a question asked and not answered, a line written and not read, a count taken and not shared, teaches the opposite of what the practice is for.

What these pages do not contain is the design of any arrangement for sharing a gain: proportions, thresholds, timing or terms. Those belong to each organisation and the people it covers, and they are decided separately.

## 1 · The signs of a busy corridor

*From Chapter 1. Used in days one to ten, and again at day ninety.*

Sit in on a meeting where decisions are made, and tick what you see. Then ask two people privately about the last decision that slipped.

| SIGN | SEEN? | WHERE, AND WHEN |
|---|---|---|
| A decision approved in the meeting is reopened by email within a week | | |
| Important meetings have pre-meetings among the people who will speak | | |
| The same three people speak in every review | | |
| Silence of more than three seconds after *any questions?*, then the agenda moves on | | |
| Conversations start in the corridor within five minutes of the end | | |
| A project's owner learns it is late from finance, not from her team | | |
| The minutes record agreement nobody can remember giving | | |
| Asked when they first suspected a slipped decision would slip, people name a date before the decision | | |

*Reading it.* One or two ticks are ordinary. Three or more, in the same meeting, mean the meeting and the corridor are holding different assessments. Start the hallway question (page 3) in that meeting.

## 2 · The two-column page

*From Chapter 1, after Argyris and Schön. A private exercise for the sponsor, used once in the first ten days and once at day ninety.*

Recall a recent conversation in a meeting that did not go as you hoped. Write it down in two columns. On the right, what was actually said, as near word for word as you can manage. On the left, beside each line, what you were thinking and did not say.

| WHAT I WAS THINKING AND DID NOT SAY | WHAT WAS SAID |
|---|---|
| | |
| | |
| | |
| | |

When it is done, answer three questions underneath.

1. What in the left-hand column would have changed the decision if it had been said?
2. What did I assume the others were thinking, and how do I know?
3. What would I have had to say, and how, for the left-hand column to be said aloud?

*Reading it.* Most leaders find that the left column holds a forecast and that their right column holds a euphemism of it. That is the gap this book is about, seen from the inside. Keep the page private. It is for your own seeing, not for the team.

## 3 · The hallway question: run sheet

*From Chapter 1. Used from day eleven in two standing meetings, then wherever it helps.*

Before the meeting (five minutes). Choose the decision on the agenda most likely to be talked about in the corridor afterwards. Decide what you yourself are least sure about in it, and write it in a sentence.

At the start of that item (one minute). Say your sentence. *Before we decide this, the part I am least sure about is …*

Before the vote (two minutes, plus whatever the answers need). Ask, in these or your own words: *What are we saying in the corridor that we are not saying at this table?* Then wait. Count to ten silently. Do not fill the silence.

When the first answer comes. Thank the person in a sentence, then ask about the substance: *what would we need to check?*, *who knows that best?* Do not ask why it was not raised earlier.

If the answer changes the decision. Defer the decision, name who will test the point and by when, and put it first on the next agenda.

After the meeting (five minutes). Note for the convenor what was said, by whom, and what changed. Note also whether the corridor was quieter.

Sorting what you hear. Put each answer in one column.

| FORECAST (WHAT WILL HAPPEN) | PREFERENCE (WHAT I WOULD DO INSTEAD) | GRIEVANCE (WHAT THIS HAS COST US BEFORE) |
|---|---|---|

Forecasts go to the decision. Preferences are noted and weighed. Grievances are separated into their forecast and their history; the forecast goes to the decision, the history to a separate conversation.

Mistakes to watch for. Asking after the vote. Asking in the last five minutes. Arguing with the first answer. Asking only when things are going badly. Asking in your own meetings and not in your superior's.

Signs it is working. By the fourth meeting at least one answer has changed a decision or its plan. By the eighth, people begin to bring their forecast to the meeting without being asked.



*4 · The round: question set and order*

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## 4 · The round: question set and order

*From Chapter 3. Used from day eleven, alongside page 3.*

Questions that replace *any questions?* Choose one per meeting. Each assumes there is something to find, and none can be answered by silence.

- If you had to check one assumption in this before we decide, which would it be?
- Where is this plan most likely to be wrong?
- What would someone who disagreed with this say first?
- What does this depend on that nobody in this room owns?
- What would you want to know before you signed this yourself?
- What did we decide last time that this quietly changes?

Order of speaking. Start with the person who joined most recently or holds least standing. Go round the table in a fixed direction. The most senior person speaks last, and the sponsor last of all.

What to say back.

| WHEN | SAY | AVOID |
|---|---|---|
| A real point is raised | *Show me. / What would we need to check?* | *Good question.* (It makes the moment about courage.) |
| A point turns out to be mistaken | *Thank you. It holds because …* then move on, same tone | Any sign of impatience; explaining at length |
| Someone passes | *Fine. Come back to it if something occurs to you.* | Pressing; a joke |
| A point criticises your own work | *That's fair. What would you change?* | Defending before you have heard it out |

Credit. When a point from the round changes a result, name the person who raised it where it counts, to the people whose opinion matters to them, with their permission.

Progress log. Keep for six weeks.

| WEEK | SPECIFIC ANSWERS (COUNT) | ANSWERS THAT CHANGED SOMETHING | QUESTIONS RAISED BEFORE THE MEETING, IN WRITING | WHO SPOKE FOR THE FIRST TIME |
|---|---|---|---|---|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |

*Reading it.* The signs arrive in order: answers grow specific; people arrive with their assumption chosen; questions start to come before the meeting. When the third appears regularly, the round can be shortened.

## 5 · The order walk: walk sheet

*From Chapter 2. Used in days thirty-one to fifty, for three ordinary items; repeat every four weeks.*

Choosing the item. Ordinary, not famous. Finished within the last two weeks. Crossed at least three desks. Nobody's emergency.

Item: Finished on: First contact on:

Walk backwards, from completion to first contact. At each desk, ask the three questions and fill a row. Mark each time R (from a record) or M (from memory).

| DESK | ARRIVED HERE | WORK STARTED | WORK FINISHED | MINUTES OF WORK | WHAT DID IT NEED FROM THE PREVIOUS DESK THAT IT DID NOT HAVE? |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Totals.

- Total minutes of work (add the column): _____
- Total elapsed time, first contact to completion, in minutes: _____
- Flow efficiency (work ÷ elapsed × 100): _____ per cent

*Reading it.* Report the flow efficiency plainly. A low figure is ordinary for work that crosses several desks (the order in Chapter 2 held about fifty minutes of work in six days), and it is a description of the system, not of anyone's effort. The right-hand column is where the first change usually is.

## 6 · The count and the arithmetic

*From Chapter 2, after Little (1961). Used on the same days as the walk.*

The count. At each desk, count every open item. Include items waiting on a customer, items parked because they are awkward, and items held in someone's head because the system has no place for them.

| DESK | OPEN ITEMS TODAY | ITEMS FINISHED PER DAY (AVERAGE OF THE LAST FOUR WEEKS) | DAYS OF WAITING AT THIS DESK (OPEN ÷ FINISHED PER DAY) |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Whole system | | | |

Little's Law, as used here. In a stable system, over a long enough period:

> *average time an item spends inside = average number of items inside ÷ average rate at which items are finished*

Worked example, from Chapter 2. About thirty orders are open across the order desks, and the firm ships about five a day. Thirty ÷ five = six. An order spends, on average, about six days inside. To halve that to three days at the same rate of finishing, the number of open orders must fall to about fifteen.

What the law does not tell you. Which item to do first. Why the items are there. What happens in a week when the system is filling up or emptying out. Use it for averages over weeks, not for the next order.

## 7 · The first changes, in order

*From Chapter 2. Used once the walk and the count are done.*

1. Remove the round trips. From the right-hand column of the walk sheets, list every fact a desk needed and did not have. Agree who will ask for each, at the first contact. Write the questions down where the first desk can see them.
2. Make elapsed time visible. Put the week's lead time, in days, where every desk that touches the work can see it. Beside it, the open count at each desk. No praise, no blame.
3. Set a first limit. For the desk with most days of waiting, agree a limit on open items close to today's count and a little below it. Agree what happens when it is reached (for example, the desk before it stops sending new work for an hour and helps finish). Tighten it every two weeks while it holds.
4. Walk again in four weeks. Expect the longest wait to have moved.

Watch for. A falling lead time caused by items being closed early. A limit broken in the first busy week. Work visibly piling at the front door, which means the limit is working.

Read the spread. Each week, note the slowest tenth of items as well as the typical one.

| WEEK | TYPICAL LEAD TIME (DAYS) | SLOWEST TENTH (DAYS) | OPEN ITEMS, WHOLE SYSTEM |
|---|---|---|---|
| | | | |
| | | | |
| | | | |



*8 · The page on the wall*

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## 8 · The page on the wall

*From Chapter 4, after Tucker and Edmondson (2003). Used from day forty-one, on one or two front-line teams.*

The page itself. Pin it at the place the work is done, where people pass during a shift. Head it with one sentence: *Write anything that got in the way of the work today. One line is enough.*

| DATE AND TIME | WHAT GOT IN THE WAY (IN YOUR OWN WORDS) | NAME (IF YOU WISH) | ANSWER | ANSWERED ON |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

The manager's three commitments, said aloud to the team.

1. I will read this page every day.
2. Every line will receive one of three answers within a week: *fixed, and how*; *cannot be fixed now, why, and who now holds it*; *passed to (name), on (date)*.
3. I will be on the floor for part of every shift, including nights.

The grouping rule. Once a week, group the lines that describe the same fault. Take each group, with its dates and times, to the person who can change the system. Write the answer beside every line in the group, with the names of those who wrote them, if they agree.

Weekly questions for the manager (ten minutes).

- Which lines are still unanswered after five days, and why?
- Which group of lines points at a system outside this team?
- What did I fix this week that I could have fixed a month ago, had I known?
- What workaround of my own could I write on this page?

Signs it is failing. Fewer lines each week. Lines only about trivia. Many lines and few answers. A line taken down.

## 9 · The measurement conversation

*From Chapter 5. The history it reads is copied and dated by day ten (Chapter 6); the conversation itself is held in days sixty-one to ninety, for one or two gains already found.*

Who is in the room. The person responsible for the money. The person responsible for the operation. Someone who speaks for the people whose work will produce the gain. The person who will do the calculation, and, if that person reports to one of the others, the person who will check it.

The questions, in order. Do not skip ahead.

1. What, in plain words, is the team changing about how the work is done?
2. If it works, what would change in records the organisation already keeps?
3. What do those records show over a long enough history (a year or two where possible)? Plot it. What does an ordinary period look like?
4. What could move the number for reasons nobody here controls? For each: will it be allowed for, from which record, and how?
5. What second measure would rise if the first improved only because something was moved elsewhere?
6. Who will do the calculation, and how can it be checked by someone with no stake in the answer?

7. How, and how often, will the result be shown to the people whose work produced it?
8. What happens if a record changes, or a system is replaced, during the period?

The one-page agreement. Fill it in together and sign it before the change begins, or, if it has begun, from today.

| |
|---|
| What is being changed |
| Main measure, and the record it comes from |
| History used, and the ordinary range it shows |
| Things that move the number that nobody controls, and how each is allowed for |
| Balancing measure, and its record |
| Who calculates; who checks |
| How and how often the result is shown, and to whom |
| What happens if a record or system changes |
| Date agreed |
| Signed |

Mistakes to watch for. A baseline taken from the worst recent period. An adjustment proposed after results are known. A single measure used alone. A calculation done privately and announced. Someone in the room going quiet.

Reading the monthly figure. Plot each month against the ordinary range of the history. Treat a point as news only when it falls outside the range, or when several in a row move the same way. One good month is not yet a gain.

## 10 · The ninety days on one page

*From Chapter 6.*

| DAYS | PRACTICE | WHO | TIME IT TAKES | WHAT IT PRODUCES | EARLY SIGN IT IS GOING WRONG |
|---|---|---|---|---|---|
| 1–10 | Listen: sit in, count, ask about slipped decisions, choose three items, list the records and fix a dated copy of their history | Sponsor, convenor | Sponsor about 4 hours a week | A first-guess page: where the flow stops | People asking what the new initiative is called |
| 11–30 | | Sponsor | About 10 minutes a meeting | Answers that changed a decision | Answers no more specific in week |

| DAYS | PRACTICE | WHO | TIME IT TAKES | WHAT IT PRODUCES | EARLY SIGN IT IS GOING WRONG |
|---|---|---|---|---|---|
| | The table: hallway question and round in two meetings (pages 3 and 4) | | | | four than week one |
| 31–50 | The walk and the count (pages 5 to 7) | Working group; sponsor walks one | About an hour per walk; an hour to count; 90 minutes to read | Flow efficiency, days waiting by desk, the missing facts | The walk tells a story everyone already knew |
| 41–70 | The page on the wall (page 8) | Front-line manager | 10 minutes a day; presence on every shift | Faults removed, with dates and names | Fewer lines each week |
| 61–90 | The measurement conversation (page 9) | Finance leads; operations; front line; calculator | Two meetings of 90 minutes | A signed page and a first monthly figure | Someone in the room goes quiet |

## 11 · The day-ninety review

*From Chapter 6. A meeting of the working group and the sponsor, about two hours.*

Bring the first-guess page, the convenor's record, the walk sheets and counts, the page from the wall with its answers, and the signed measurement page.

Ask, in order:

1. Where was the first guess right, and where was it wrong?
2. Which decisions changed because something said at the table reached the decision in time?
3. How much of the elapsed time of the work walked was waiting, and has it moved?
4. Which faults on the front line were removed, and who found them?
5. Is there a gain both sides believe, and what does it show so far?
6. Who has stopped speaking in these ninety days, and who has started?
7. Which of the practices is not yet real, and what would make it real?

What not to conclude. That the climate has changed (ninety days show whether practices are being kept, not whether a culture has moved). That one good month is a gain. That an absence of findings means an absence of problems; it usually means one of the earlier steps is not yet real, and the first place to look is the table.

## 12 · The first Monday

*From Chapter 6. For anyone who wants to begin with less.*

- In one meeting you run, before its first decision, say what you are least sure about. Then ask each person, newest first, which assumption they would check.
- Take one ordinary piece of work that finished last week and crossed three desks. Add up the minutes anyone worked on it and the minutes it took. Write both numbers down.
- At the end of the day, ask yourself the canon's question: *What am I not saying that the people I lead need to hear?*

## Where the flow stops in yours

Somewhere in every organisation an order that holds fifty minutes of work waits six days, and somebody on the floor already knows why.

Luminous Prosperity Inc. takes this work into organisations as a gainshare. The flow is opened from the inside, with the people who already hold what the firm knows. The gain is counted from records the firm already keeps, against a measure both sides sign before anyone knows the answer, and the house is paid as a share of what is found: between thirty and ten per cent of it.

The workbook gives twelve pages for one team. Walking a whole organisation's handoffs, and agreeing a number both sides will sign, is done in the building. That begins with a conversation.

REQUEST A CONVERSATION

# References

1. Sources for this chapter: The sources behind these pages are given in full in the notes to Chapters 1 to 5: Argyris and Schön (1974, 1978) and Argyris (1980) for pages 1 to 3; Edmondson (1999), Nembhard and Edmondson (2006) and Detert and Burris (2007) for page 4; Little (1961, 2011) and Kingman (1961) for pages 5 to 7; Tucker and Edmondson (2003) for page 8; Galton (1886), Shewhart (1931), Kerr (1975) and the U.S. Department of Energy's measurement and verification guidance for page 9; Santa Anna, A. *Organizational Soul Work*, "Luminous Invitations" ("The Leader's Mirror"); *Conscious Governance Models*, "Principle 2: Structured Invitations". The Luminous Developmental Canon; The times given are planning guides from practice, not findings of a study.

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