Process Fitness

Process Improvement Lessons from Personal Trainers

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Premise

There are useful analogies between personal and “process fitness”.

- Process coaches can learn from fitness coaches and trainers (and probably vice versa)
- For both process and personal fitness you will need to deal with difficult clients and/or team members.

Authors Note: Much of the material in the paper was paraphrased or lifted directly from the PTDC web site, and/or from “Ignite the Fire” by Jonathan Goodman.
A Working Definition

Personal Fitness = ?

*By Analogy,*

Process Fitness = ?
Analogy: Personal and Process Fitness

What are the similarities between leading or coaching process improvement efforts and personal training for personal fitness?
Some Areas of Analogy

1. People are more interested in the product or outcome than the process
2. Process is a major contributor to the eventual outcome
3. Client needs differ, **BUT**, 
4. For overall fitness, there are basics that are apply to everyone
5. As a coach or trainer, you need to lead by example
6. There are common paradigms for improvement
7. You will need to deal with difficult clients

Here are the main points, up front.
It Ain’t Always What It Appears to Be

How fit is he?

Actually, he is one of the most fit people I know, shown refueling after a “short” training run – 72 miles through the Pennsylvania mountains . . . getting ready for Badwater.
It Ain’t Always What it Appears to Be

He has one of these.

Chances are, you don’t.

Unless you are pretty seriously insane, you won’t ever have one.

I’m proud of him, anyway.
The Fitness Promise

“Us”

“Them”

Being “Them” is more fun, and, all it takes to be one of “Them” is . . . Getting into Shape.
Before and After

Here is what you are promised. But, to succeed, consider:
What is motivating you? What’s real / realistic?

One of these images is from Woman’s Day; the ladies name is Maureen. I acknowledge that I used this respectfully, for educational purposes, and not for profit.
Silver Bullets and Snake Oil

“When implemented correctly with full senior management support and a new hardware platform purchased from our partner, SO Enterprises, the Silver Bullet version of our tool will dial up the users, get the requirements, write the code, test it, and deposit large sums of money into your bank account.

Don’t forget, the most successful users also purchased at least 10 weeks of special high-intensity training from our highly skilled staff . . .”

Disclaimer: User results may vary somewhat.
If What You Are Doing Isn’t Working

1. Keep doing what you are doing, only **work harder** at it.
2. Change what you are doing immediately, to the latest new thing being done (research on the internet), repeat, ad infinitum.
3. “Roll your own” improvement plan
4. Hire a coach

> Sorry, none of these guarantee success. All will work in some cases.
Real Improvement – How to Do It?

To improve your either personal or process fitness:

- Know where you want to be (Motivation)
- Know where you are (Observation)
- Have plans and methods (Preparation)
- “Do it” (Perspiration)
- Monitor progress (Recalibration)
- Experience success (Celebration)
An Improvement Cycle

Celebration → Motivation

Recalibration → Observation

Perspiration

Preparation

START HERE!

SPEND (LOTS OF) TIME HERE!!!

> A variant of the Shewart Cycle (Plan–Do–Check–Act)
If You Are the Coach, You Will Have Difficult Clients, Like These:
For me personally, it has always been tempting to go toe-to-toe with the Alpha male, particularly if you have executive sponsorship backing you.

However, that is exactly what I did with the Alpha Male on the team I was hired to lead. When my sponsor retired, the Alpha Male went out of his way to sabotage the effort, and he had 30-plus years of political connections inside the organization. Even though I won the initial battles, I lost in the end, and, so did the organization. Big time.

Next time, I’ll listen more, and try a Sandwich. It may or may not avoid all confrontations – but it may help to transform the power relationship into a peer-to-peer collaboration.
The Content Cathy

**Challenges for the Content Cathy.**
Keeping them healthy is the biggest challenge.
A secondary challenge is that you may want all of your clients to push themselves hard and get better; Content Kathy loves working but doesn’t want to work hard.

Techniques for dealing with Content Cathy.
They’ve come to you because you have the knowledge to help them with their problems. Your job is twofold: (1) Organize their workouts in a safe and efficient manner, (2) Provide a subtle push and pleasant conversation.

Sneak in assessments without making it overt, and couch improvements in terms of doing something new or fun, or in terms of injury prevention.

The key in dealing with this client type is to be willing to veer from your training model and mold yourself to their needs. Have some fun.
You must accept the [valid] differences in their reasons for fitness, and work within them. Client’s needs differ!
P.S. for every Content Cathy, there is a Content Carl 😊
The Busy Bill

**Challenge for the Busy Bill.**
Time is the issue with the Busy Bill. This client understands the value of improvement and wishes they could be more consistent. It’s impossible to program even short term.

**Techniques for dealing with the Busy Bill.**
- Try to make yourself a sanctuary and build a relationship that will allow more focused work when (and if) the crises du jour passes.
- Simplify, simplify, simplify. This keeps you from overwhelming your Busy Bill; keep them focused on one or two critical things that will move things forward.
- Eschew timelines for improvement. Especially, don’t box yourself in with fixed dates for meeting goals that depend on Busy Bill.
- Continually assess their mental condition. Do they need to blow off steam? Provide a vent. If they are unable to keep regular appointments, study their routine and find ways to be visible, catching them in the hall.
- When you are in meetings, keep the phone – or ask them to set the example for the group by turning their phone off.
The Process Monster has participated in improvement programs before, and may wonder why everyone else didn’t improve. They may have extraordinary skill with a particular tool or method—say 6-sigma or a particular estimation method—but may not see that their approach is unbalanced.

The Process Monster may expect everyone else to work as hard as they do. After all, working on improvement half time is only half days. As in, there are 24 hours in day, so a half-day is 12 hours.

You have to take charge. If your Monster can’t be tamed, then they need to be taken off the improvement team. If they are sponsoring the improvement effort, then you may need to move on.

The Assiduous Monster

Challenges for Assiduous Monsters.
This the hardest working person in the gym/office.
This client won’t stop until he’s given everything he has. You may be thinking – “So what’s wrong with that?” To start, burnout and alienating/intimidating other team members (possibly including you).

Technique for dealing with the Assiduous Monster.
The Monster has participated in improvement programs before, and may wonder why everyone else didn’t improve. They may have extraordinary skill with a particular tool or method—but may not see that their approach is unbalanced.

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improvement effort, then you may need to move on.
Aerobics Alice

Challenge for the Aerobics Alice.
In the gym, she wants to exercise and look good, but is not really concerned with form or theory. She prefers group work to individual effort. By analogy, in the workplace she is more interested in appearances and consensus than improving.

Techniques for dealing with Aerobics Alice.
The first step is to determine the decision-making mode of the client. Alice is likely to be more collaborative and group decision focused. This is not a bad thing for a process improvement effort, and actually will help things along if channeled correctly. She may be socially focused rather than intrinsically goal driven, so group consensus about improvements will mean more to her than metrics.

Second, you need to listen well. She will be the first to let you know what isn’t working with the team. It may be there are critical players that need to be involved, or that the processes you are developing don’t fit the client’s needs. She may not see the connection between an improved CM system (your goal) and reduced customer complaints (her team’s goal), so you need to make the connection.

If you can’t gently “sell” the improvements you are working on, you will need to change your approach or take a hardline — and be ready to walk away.

Aerobics Alice doesn’t care about form. She wants to look good and wants to feel each workout, but she’s not interested in detailed explanations of exercises, workouts, or the physiology behind them. The Aerobics Alice has already been active by taking exercise classes or working out with friends. She’ll see you as a tool for quicker results and will hold you accountable if she doesn’t get them.

There are two basic approaches to take with a typical Aerobics Alice client. You need to recognize that your client will go back to group exercise classes or working out with friends, and prepare her for it. Add some aspects of group exercise into your workouts and focus on proper form, and you may be able to keep the client on an irregular but continuing basis, such as once a week or even once a month. For example, invite her to bring her friends to the session (for a nominal charge).

Alternatively, you can take a hardline approach. If you think that Aerobics Alice would benefit more from your training than from what she was previously doing, tell her. Just keep in mind that it’s her goals that matter, not yours.

The first step is to determine the decision-making mode of the client. An “Aerobics Alice” is likely to be more collaborative and group decision focused – just as she wants to work out in a group class in the gym, she will want everyone to be part of the team in the work place. This is not a bad thing for a process improvement effort, and actually will help things along if channeled correctly. She may be socially focused
rather than intrinsically goal driven. For a socially focused person, gaining team consensus is more important than achieving a metrics-based improvement goal. She may also be motivated by appearances. This may express itself as a form of risk aversion—“don’t do anything that would make us look bad“. Alternatively, it may express itself as “We need to change this because it will look good to the VP.”

Based on her decision making model, you can “sell” necessary changes as ways to involve the group, ways to reduce risks, or ways to showcase the team. If consensus is involved, be prepared to take some extra time.

The second step is to listen. When any client tells you that what you are doing isn’t working, you need to find out why. It may be there are critical players that need to be involved, or that the processes you are developing don’t fit the group or client’s needs. Your client may not see the connection between an improved Configuration Management system (your goal) and reduced customer complaints (her team’s goal), so you need to make the connection.

If you can’t gently “sell” the improvements you are working on, you will need to change your approach or take a hardline – and be ready to walk away.
The Quiet Assassin

*Challenge for the Quiet Assassin.*

This client kicks butt! They always give you 100%. The Quiet Assassin will never speak about anything other than work. This makes building a relationship difficult, and it makes it impossible to get feedback about how you are doing as a coach, whether you are meeting her goals, or ??? You may become complacent — after all, she is doing all the work.

**Technique for dealing with the Quiet Assassin.**

Your client for the process improvement effort may be massively introverted. This may mean they are not engaged, it may simply mean they don’t talk much, or it may mean they are dealing with personal issues that are, frankly, none of your business.

For some introverts, you may need to find communication channels that are more comfortable than face-to-face (some engineers really prefer e-mail.)

You will need get creative and find other ways to check their support for the effort. Ask for help, assigning a homework task more involving than “read and approve”. For example, ask for a visible sign of sponsorship. “Can you please send out a note stressing how important it is to attend tool training? There is some resistance and a nudge from senior management will help.” Then wait. Don’t draft the note for them – tell the sponsor it needs to be in their words. **Gauge their support by the actions.**
Challenging Charley

Challenges for Challenging Charley.

The Challenging Charlie *knows everything* and *thinks* they know everything. They’re skeptical of you and won’t commit to anything long-term. This client type may be experienced in improvement or fitness programs, or may not be. Often the Challenging Charlie has done research prior to engaging. They want to test you before they commit to working with you.

Techniques for dealing the Challenging Charley.

Better have a plan, and facts, and persistence.

There is a trap here. A continual stream of challenges may be a deep-seated resistance to the effort, stemming from another cause. To succeed, you will need to find and address the root cause of the resistance. Where a personal trainer might win over his Challenging Charley by anticipating his questions and having a greater level of expertise, you may not be in that position.

The software development field is so complex, no one can master all aspects of it, and Charley may have specialized expertise you don’t have. Then you have to co-opt their expertise and make it part of the change plan. One way to do this is to ask the Challenging Charley what they would do. If Charley has an answer, make them responsible for the result, incorporate it into the plan, and step aside.
In IT, this is MEETINGS that drag until everyone’s bladder gives out because the senior architect keeps talking, the manager who always wants to implement the latest buzzword trend, the free spirit who has wonderful creativity but no follow through, or, better yet, a team with all three aspects in play at the same time.
A Caveat: Reasoning by Analogy

Analogies can be useful, but don’t carry them too far.

Even though there are many areas of similarity here, in most cases, process improvement is a team effort. Although you will need to deal with difficult clients and team members, there are team-based techniques available to you that might not apply in a 1-on-1 personal training situation. Team coaching analogies might be more appropriate.

Not a lot of time left by the time you get here, so . . . Summarize and go.
A Final Note

It really isn’t easy.

Obesity and other health issues are rampant in the US, and rapidly increasing in other industrialized nations.

We aren’t doing that well in the process improvement arena either – up to 80% of all improvement efforts fail.

If a coach or trainer improves your chances of success, then use one.

Questions?

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Abstract and Biography

Abstract
Many people have seen the "before" and "after" pictures of people who have successfully undertaken a rigorous fitness program. What you don't often see is the pictures of those who fail to make the changes—just as companies don't advertise their failed process improvement efforts.

One key to success is to involve a personal trainer (or process improvement coach) early in the transformation effort. Michael has gathered some lessons from some premier personal trainers that can be applied either to personal or organizational improvement efforts.

This paper explores some of the areas where personal training and process improvement coaching are analogous, and then expands on one of these areas—dealing with difficult clients.

Michael will pass on lessons about how a trainer might deal with the know-it-all alpha male, the overly content person, the client who always goes off track, and others. These lessons may save you from a client or team member who (wittingly or unwittingly) sabotages your best efforts.

This presentation is suitable for both gym rats as well as couch potatoes—as long as you have a desire to improve.

Biography
Michael has 30+ years experience in the computer industry, with interests spanning agile methods, architecture, metrics, process improvement, project management, quality management, software risk management, and teambuilding.

Currently an independent consultant, Michael started out as a computer officer doing satellite communications in the US Air Force, and has worked for the Software Engineering Institute, Lucent Technologies (Bell Labs), and Computer Sciences Corporation.

Michael is on the PNSQC Board, and has served as the Invited Speaker and Keynote Chair for the 2011 and 2012 conferences.

He recently embarked on a Personal Training certification program, and noticed many similarities between what personal trainers and process coaches do.

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