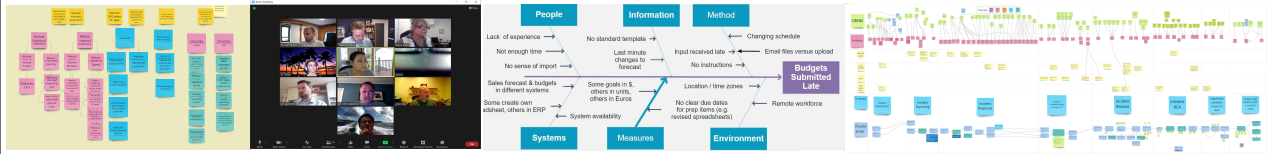


Remote Collaboration



Tales From the Trenches: How to *Truly* Engage Cross-Functional Improvement Teams in a Remote Environment

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Mike Osterling

Mike is a coach, facilitator, speaker, and consultant with more than 25 years experience leading Lean transformations and business performance improvement from within and as an external consultant. As a consultant, he has coached, trained, and facilitated leadership and improvement teams in a broad range of industries including manufacturing, oil and gas, financial services, technology, and healthcare.

The last couple of years have been times of dramatic change for Mike as he has helped multiple organizations transition their training, coaching, problem-solving and improvement activities (front lines to senior leadership) to virtual formats. Mike is the author of several books including [Value Stream Mapping](#) and [The Kaizen Event Planner](#).
www.mosterling.com



Collaborative CI Activities

- Kaizen / Rapid *Improvement* Events
- Rapid *Planning* Events
- Value Stream Mapping
- Hoshin Kanri /Strategy Deployment



Participant Poll

What type of remote team-based, continuous improvement activity, have you participated in since the onset of COVID-19? Select all that apply.

- A. I have not participated in any remote, team-based, continuous improvement activities since COVID-19
- B. Kaizen Events
- C. Rapid Planning Events
- D. Value Stream Mapping
- E. Hoshin Kanri / Strategy Deployment
- F. Root-Cause Analysis sessions
- G. Other (please indicate in the chat window type of activity)

Participant Poll (#2)

**What's your experience level with remote collaboration?
Choose one only.**

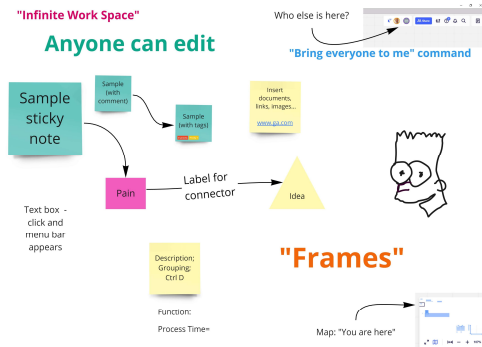
- A. Participated in meetings via voice & video – cameras only, maybe sharing some documents
- B. Participated in working sessions where everyone is viewing basic documents such as Excel or Word and one or multiple people are editing live
- C. Participated in working sessions where ONE PERSON is creating and/or editing visuals such as virtual sticky notes, flow diagrams, value stream maps, fishbone diagrams, x-matrices, etc.
- D. Participated in working sessions where ALL PARTICIPANTS are creating and/or editing visuals such as virtual sticky notes, flow diagrams, value stream maps, fishbone diagrams, x-matrices, etc.

Let's See What Remote Collaboration Can Look Like

During the sessions:

- Orientation
- Practice
- Get to work
- Reflection

Set timer in Miro



Remote Collaboration

Apps / Tools

- Miro
- Mural
- Trello
- Cardsmith
- iObeya
- Lucidchart
- Smartsheet
- Stormboard
- ...

Tool Considerations

- Everyone can edit
- Learning curve
- “Follow me”
- Export
- Templates
- Cost (free?)
- Existing platform

Keys to Success – Expectations

- Communicate ahead of time
 - Cameras on
 - Sound quality - headsets if possible
 - Focus – call on people!
 - Dual monitors if possible
 - Attendance

Keys to Success – Tech “Prep”

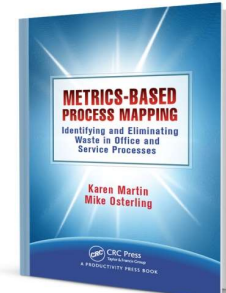
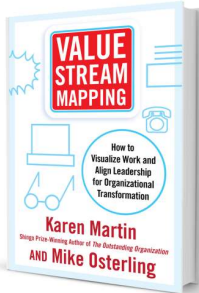
- Send tutorials / video links / cheat-sheets ahead of time
- Co-facilitator (chat, hands-up, breakout rooms...)
- Two computers (so can see what participants see)
- Practice the tech with colleagues

Keys to Success - Logistics

- Session length – short, but not too short
- Consecutive days
- Practice frame to kick off
- Breakout rooms (Zoom, Teams...)
- Use a timer (e.g. Miro’s timer during breakouts)
- Set ground rules for off-line edits (e.g. color code)
- Plus / Delta – multiple in-process checks

Resources

- Virtual whiteboards
 - Miro – www.miro.com
 - Mural – www.mural.co
 - Trello – www.trello.com
 - Card Smith – www.cardsmith.co



Check it out Yourself

- Get a free subscription to one of the apps (usually limited to number of days, boards, team members, etc.)
- Pick a colleague and a problem - something that you are currently working on or is on the near-term event horizon (doesn't have to be a team-based activity).
- Practice: Use the app and start capturing the “current condition”
 - Fishbone Diagram
 - 5 Whys
 - Current State Process Flow
 - Brainstorming (Causes? Countermeasures?)
 - Or... be creative...

Remote Collaboration

OFFER – FREE CONSULTATION

What can you do to keep your organization moving forward?

- Reach out if you have questions about:
 - Virtual collaboration
 - Running events in general
 - Remote facilitation resources



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Q&A

Remote Collaboration



San Gabriel Valley Section



Thank You!

The collage consists of four distinct visual elements:

- Sticky Notes:** A collection of colorful sticky notes (yellow, pink, blue) arranged on a light background, representing brainstorming or task lists.
- Video Conference:** A screenshot of a Microsoft Teams meeting grid showing several participants in a remote session.
- Fishbone Diagram:** A process flow diagram with a central box labeled "Budgets Submitted Late". It is surrounded by six categories: People, Information, Method, Systems, Measures, and Environment. Arrows point from these categories to the central box, indicating contributing factors. For example, under "People", factors include "Lack of experience", "Not enough time", and "No sense of import". Under "Information", factors include "No standard template", "Last minute changes to forecast", and "Sales forecast & budgets in different systems".
- Gantt Chart:** A project management chart with multiple horizontal bars of various colors (green, yellow, red) representing task durations and dependencies over time.