Focus Podcast Episode #2
Choosing & Using Focus Tools in Finance Division

Transcript

Jo: Hi, I'm Jo Hoskins, Focus Programme Officer. I spoke with David Assirati about his experience of using Focus tools and techniques in his everyday work. David is a Financial Assurance Analyst in the Finance Division and completed a 14-day Focus training programme in 2020. His team has made significant changes to processes that are used across the University, using the Continuous Improvement Approach. So, thank you for joining us today, David.

David: Thank you for having me.

Jo: It's lovely to have you with us and thank you for agreeing to talk to us about your experience of using Focus tools and applying those in your own area. I know it's easy to feel quite nervous about process improvement as a concept. Because there's no way of knowing – when you start – that you're actually going to get it right. What are your feelings about that?

David: If you take the word 'right' out of it from the beginning – nobody's right or wrong – what I've found with all the tools and the Focus methodology is that it's about collaboration. The Practitioner's not coming in with the answers. They're there to get the answers, and what you want out of the process. For the benefit of the customer, the people who are going to be doing the work, who are going to be doing the process. Just take the word 'right' out of it from the beginning.

Jo: That's a really interesting way of looking at it. And I like that because it emphasises the 'continuous' nature of improvement. Which is what we're about – Continuous Improvement. Not getting too hung up on being 'perfect' – not leaving a piece of work as 'done' because you think it's 'perfect' – but constantly looking at it to see if it can be improved. And that does enable us to adapt to ever-changing environments. That's a really interesting perspective, thank you. But you've been using Focus tools very self-sufficiently with your colleagues locally – how easy have you found them to use? And in what ways have they helped you?

David: I did the training, and one of my team colleagues also did the training at the same time. The training was very, very helpful. What it reinforced was that it's not a rigid process – there's no right or wrong *per se* – and it showed the different way you could use the different tools. We had a lot of people coming in and giving talks on how they went through a process. It was clear from that that depending on the area of work, the processes they were trying to improve, the audience and the customer and the tools available, they all approached it slightly differently. They used different tools, different parts of the tools, in a different order. You don't have to be 'trained' to use the tools because a lot of them are what I would call 'common sense' – what you're thinking, what you're doing, in your everyday work. But what the tools are doing is labelling and putting structure into that methodology of what you do every day. And I felt that because of that, when you talk to your audience, your customers, you could actually show structure – a beginning, middle and end. You could show some quite simple tools to use and what they were trying to achieve at that point in the process. Once your customer can see that there is a purpose to this, and a structure, and can see what the benefits are and what they're expected to contribute and how it's going to be used, you get bigger buy-in. You're not drifting around. They can actually see some sort of 'product'.

Jo: Given the wide range of tools available, how did you approach a situation where you might have felt overwhelmed by the choice of things available to you?

David: Don't think you've got to use all of the tools all of the time. The 3 main areas we looked at were the *Creative Problem Solving*, *Process Confirmation* (it was very important to confirm what sort of process the customer actually wanted and the organisation needed), and then *Standard Work* – in terms of: 'let's have one process that everybody can use. What we don't want is lots of manual workarounds because that just confuses everyone, so if you can, have a sort of *Standard Work* that can be used by everybody and easily reviewed. Those are the 3 main areas that we looked at. So, focus in on understanding what the problem is, understanding where you'd like to get to, and then bringing in the tools that best address that.

Jo: So, it sounds as though you're saying: It's about using the tools that will do the job that you need them to do. And when we were talking previously, you used a really good gardening analogy: you said if you know you need to dig a hold, don't use the secateurs! It's about knowing that you need to dig the hole or do a particular job, and having the confidence to choose the tool that will do the right job for you and ignoring the ones that won't contribute to your aim. Which I think is a really interesting – and wise – way of looking at it.

David: As a Practitioner, that's where you really bring in a lot of value. You're not giving the answer, but should be able to bring in those tools that you think will bring the most benefit. That your customers will be able to identify with, and use, and find useful. That's where you're bringing your value. You shouldn't expect your customers to understand all the tools. It's like a big shiny box of toys. They might want to play with every single toy in that box! But we haven't got time to play with every single toy and not every toy will be helpful. As a Practitioner you're going to bring out the best toys for that situation. That's the way to look at it. There's a lot of stuff there and it does all look nice - but nice is not always useful!

Jo: [Laughs]. Very wise words, David, very wise words. I'm going to draw it to a close there, but thank you for your time, thank you for joining us, it's been fascinating talking to you and keep on improving!

David: Thanks.