# Fulcrum

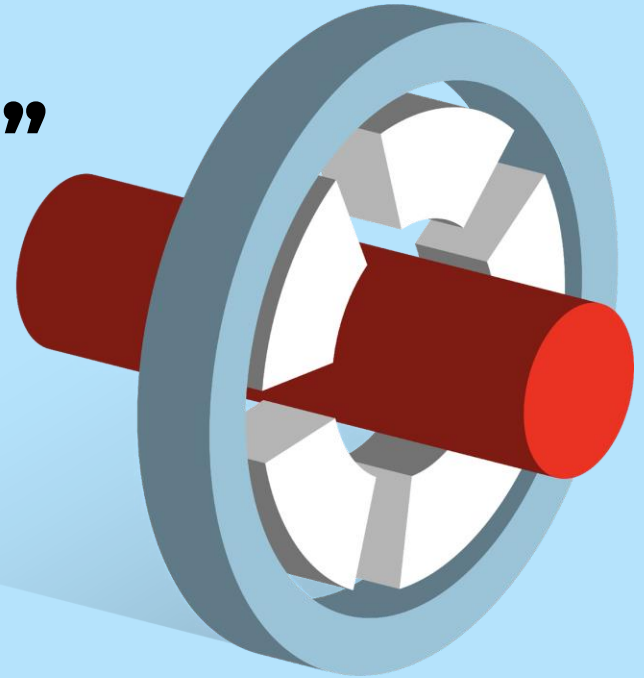# Putting the "I" in "team"

Quality inspections as a team sport

Jake Freivald
Vice President
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# Agenda

**Jake Freivald**
VP, Product Marketing

Fulcrum

**Goal:** Learn about the characteristics of high-performing teams and, knowing them, find pragmatic ways to reduce time and money lost to rework, enhance your organization's reputation, and improve margins.

## Discussion topics

- Distinctive characteristics of high-performing teams
- Supports needed for quality inspections at scale
- Continuous improvement using data and metrics

# Distinctive characteristics of high-performing teams

# Characteristics of high-performing teams

### McKinsey & Company

*McKinsey Quarterly*

**High-performing teams: A timeless leadership topic**

June 28, 2017 | Article

By Scott Keller

CEOs and senior executives can employ proven techniques to create top-team performance.

Classic business characteristics. Team composition (#, skills, attitudes, etc.), dynamics (trust, comms, risk, etc.)

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### Harvard Business Review

Sign In

**Collaboration And Teams**

**5 Things High-Performing Teams Do Differently**
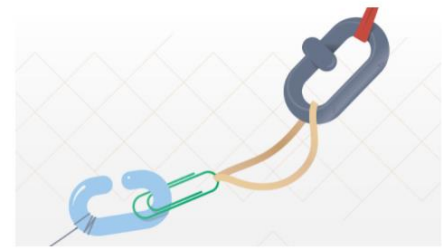
by Ron Friedman

October 21, 2021

Illustration by Daniel Creel

Psychological characteristics. Pick up the phone, more strategic meetings, non-work bonding, etc.

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### Forbes

**LEADERSHIP**

**14 Characteristics Of High-Performing Teams**

**Expert Panel®** Forbes Councils Member
**Forbes Human Resources Council**
COUNCIL POST | Membership (Fee-Based)

Sep 16, 2020, 01:10pm EDT

Efficient teams are the hallmark of an industry-leading business. Having a cohesive, high-performing team can set your business apart within your industry and ensure the success of your organization in the long run.

But what makes a team work well toward the same goals to drive your company's growth? There are obvious characteristics all performing teams share, from adaptability and commitment to communication and mutual respect. The key is identifying these characteristics and isolating them in order to train employees and identify them in future hires so...

To help, 14 contributors to Forbes Human Resources Council... forming, cohesive units, and suggest ways your teams can achieve the same...

A hodgepodge of fourteen different characteristics of multiple different types

# Focus on what we can control within our constraints

## What we can control
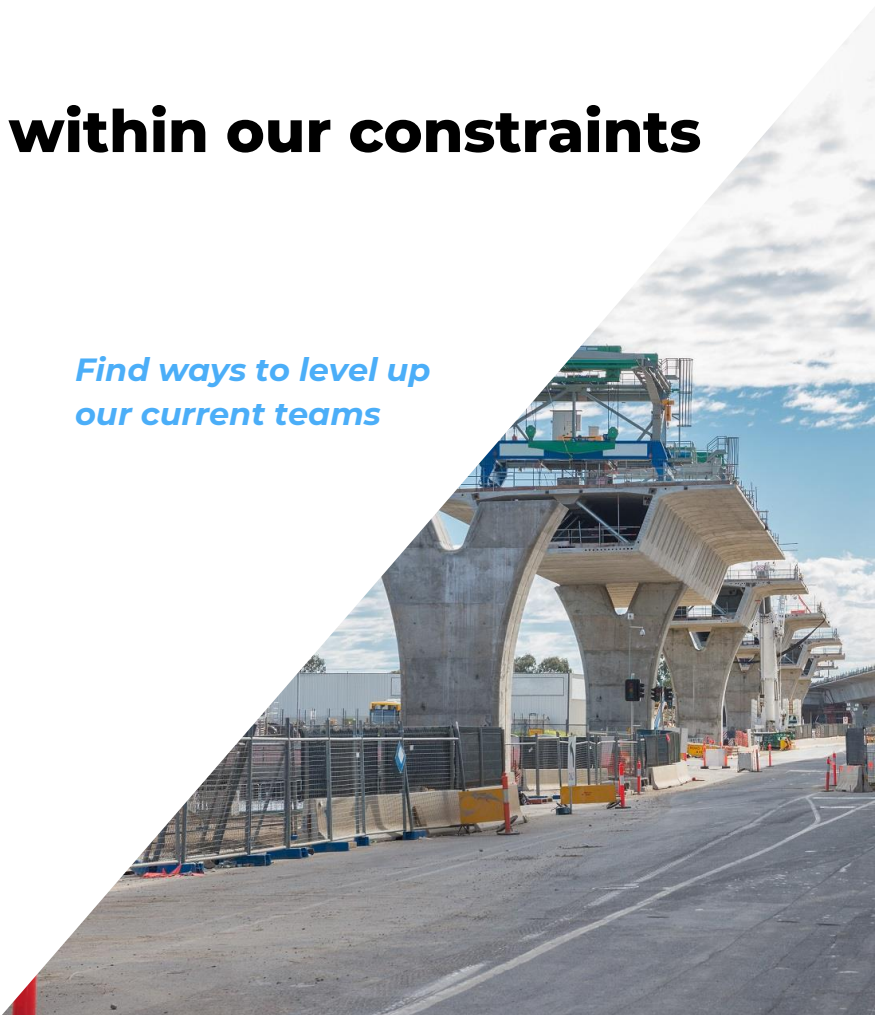
**Some things are predetermined**

- Size
- Aptitudes
- Attitudes
- Diversity

*Find ways to level up our current teams*

## Within our constraints

**We have unique requirements**

Biggest: We're required to maintain a low-risk profile

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# Supports needed for quality inspections at scale

# What characteristics should we focus on? Set 1

## Personal excellence

If we can't force personal excellence, ensure everyone knows what an excellent job looks like and how to achieve it.

**Get the team's endorphins running when they do well.**

## Alignment

Show everyone knows how the excellent job they do drives the team, division, and company missions forward.

**Get everyone pulling the rope in the same direction.**

## Transparency

Make sure everyone knows how the excellent job they do stacks up against each other and industry norms.

**Get everyone looking at the same quality data**

Notice how much *excellence*

depends on *knowledge*
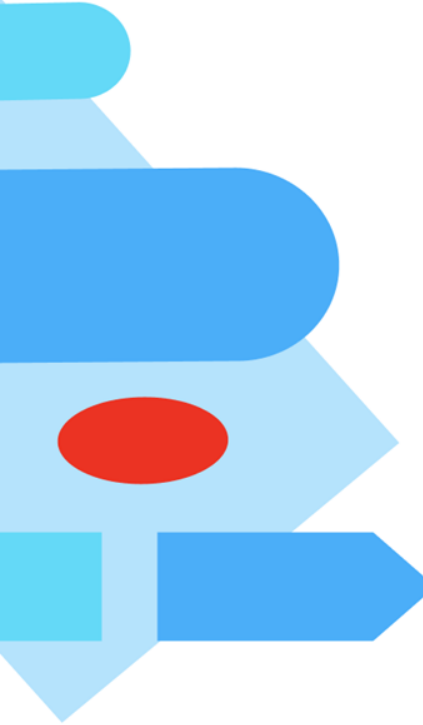
# Training is critical*

Do not underestimate the value of training…

…but don't overestimate the challenges, either.

- It's costly
- It keeps experienced people in the office
- Knowledge retention by trainees is low…
- …so it often lacks nuance
- High turnover means waste
- Trainers leave

Training provides important, **but limited**, value for increasing team consistency, quality, and productivity

# Sidebar:
# Knowledge through checklists

"

Checklists seem lowly and simplistic, but they help fill in for the gaps in our brains and between our brains.... Designed well, the results can be extraordinary.

**Atul Gawande**
Surgeon and author of *The Checklist Manifesto*

# Astonishing results from
# Dr. Pronovost's "stupid little checklist"

**66%**

drop in average
infection rates in
Michigan ICUs

**90%**

of ICUs nationwide
had worse scores
than MI's *average*

**175M**

dollar reduction in
infection-related
costs in 18 months

**1500**

Lives Saved

# Digitization required to do all of this at scale

Where is your knowledge base?

- Training
- Manuals
- Clipboards

How do you implant it into her head?

- SOP with embedded QA in a checklist
- Quality control inspection in a checklist
- Conditionals, visuals, "can't skip" fields

...all needed in real time, across sites, with virtual mentorship, and applying transparency. You simply can't do that on paper.

In addition, for alignment and transparency we need literally to see how everyone is doing – dashboards, charts, graphs, metrics (a la those "X days since last incident" signs)
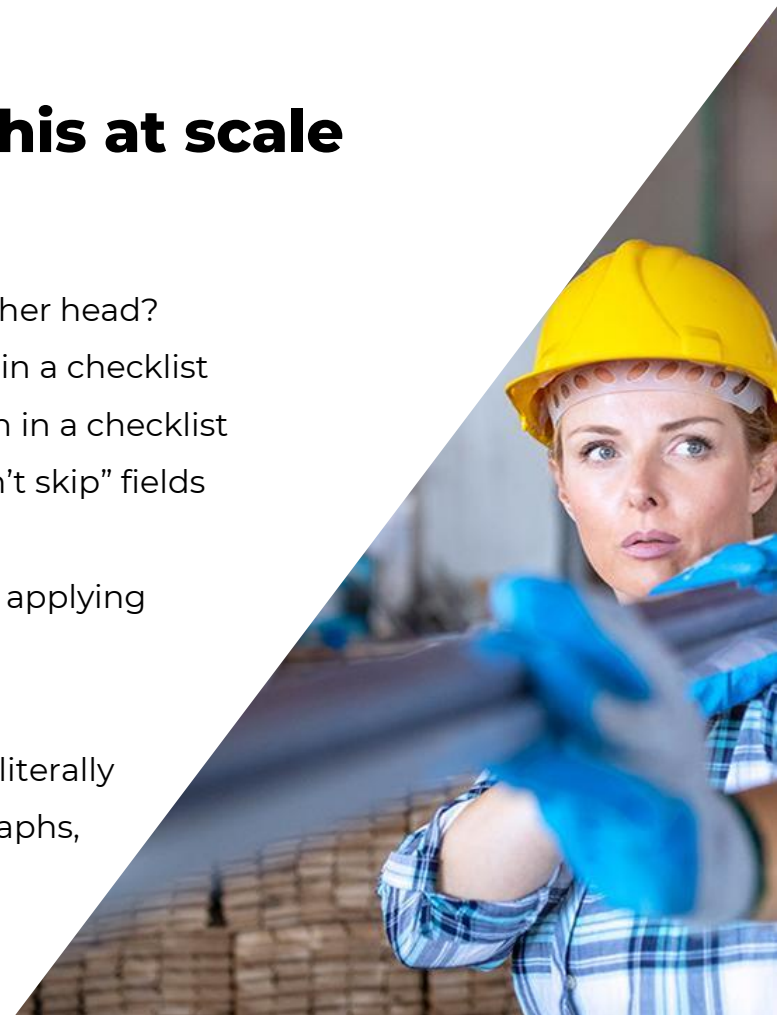
# Polling question

**Steer me: Do you want to know why the cloud is as important as digitization?**

# Why the cloud matters



Clever phrase, but it's a bit like saying that that a bank is just someone else's mattress.

*(And software as a service matters, too.)*

# Back to characteristics of teams

# What characteristics should we focus on? Set 2

### Adaptability

What processes enable us to change in tandem, appropriately, to better achieve our quality and other goals?

### Mentoring

What processes ensure that (a) institutional knowledge remains within the organization and (b) newer inspectors become more secure in their skin?

### Pride and recognition

What processes ensure that people are known for the great work that they do – and that everyone knows they deserve it?

*These also require knowledge, but focus on how teams acquire, adapt, and leverage that knowledge over time.*

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# In all of these cases, the data must flow

Everything discussed so far requires multidirectional data flows, sometimes in real time

- Inspector to supervisor / mentor and vice versa (supervision, advice, quality posture: "quality" stuff)

- Experienced staff to checklist maintainer (showing how we need to improve situationally)

- Novice staff to checklist maintainer (showing how we need to improve ease of use)

- Inspectors to team leaders and vice versa (tasking and issues: "management" stuff)

- Stakeholders to team leaders (Alignment: Why is quality important, e.g., landing more contracts, reduced money lost to rework, keeping to schedule)

- Team leaders to stakeholders (Fulfillment: How are we doing, what is quality posture, what can you tell clients/prospects/insurers, etc.)

# Continuous improvement using data and metrics

# Improvement requires metrics, which requires data

What metrics?

- Peter Drucker: "You get what you measure." So think about what you need, and start to measure that.
- Be careful of intermediate steps. Focus on real reasons.
- E.g., Punishing quality issue reports teaches people not to report quality issues.

Suggested types of metrics:

- Quality performance: Remediation time/cost, rework material usage, calendar days lost, person-days lost
- Inspection performance: Inspection time/cost, time workers wait for inspection completion, quality problems found post-inspection
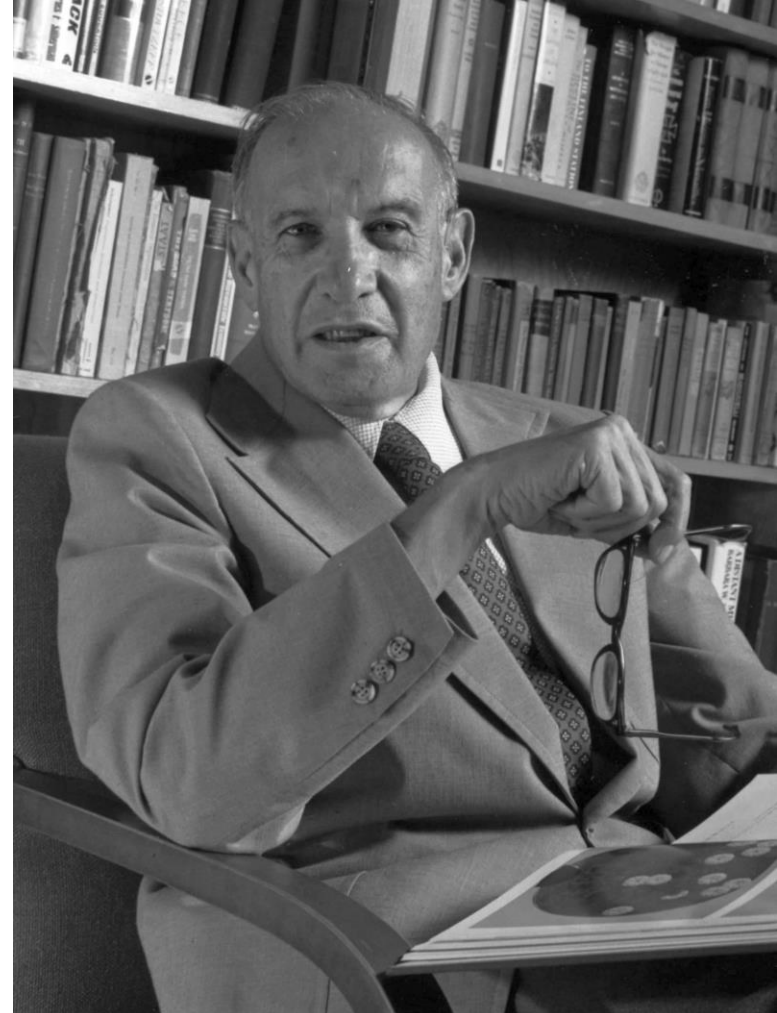
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# About Fulcrum

# Automating field inspection management
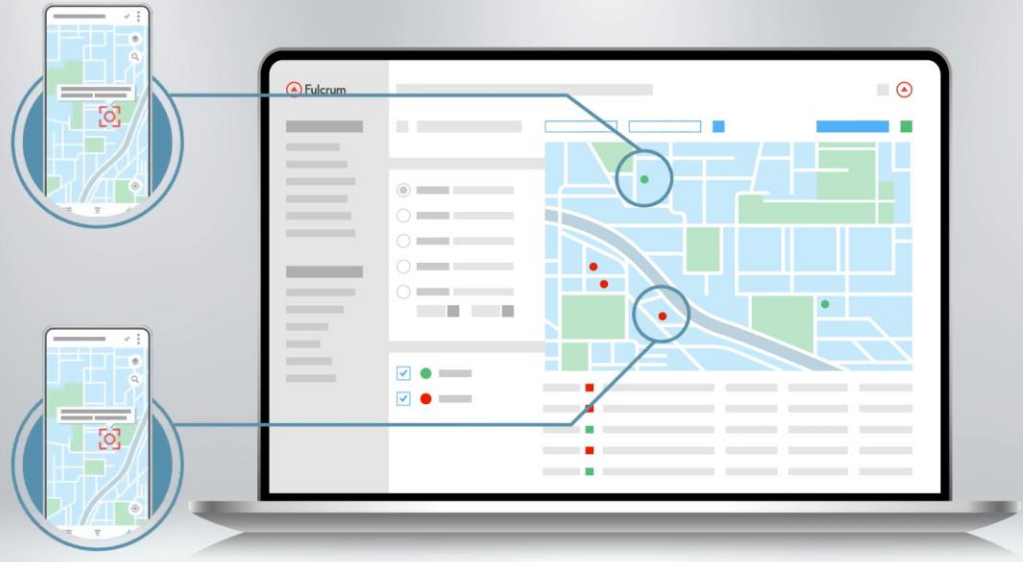


- Drive intelligent automation to maximize field team performance and agility
- Harness the value of location for mobile teams
- Ensure process rigor and compliance at scale
- Create real-time visibility into inspection performance across inspectors, teams, and stakeholders
- Digitally transform field-based inspections for safety, quality, & maintenance

**Fulcrum**

**Automating field inspection management**

# The Fulcrum platform

Fulcrum provides a SaaS-based **Field Inspection Management** platform that

- digitizes inspection processes,
- provides intelligent automation for inspection teams, and
- delivers data-driven reporting and analytics

to drive safer and higher-quality outcomes.

# Example: Tasks



Team leader creates tasks

Inspector completes tasks

Team leader manages the team's tasks

# Example: Issues



Fulcrum user
creates issue

Team leader manages issue resolutions

# Example: Issues



Sees issue, scans QR code

Reports issue *without downloading Fulcrum*

Team leader manages issue resolutions

**Try it!**

# Example: Out-of-the-box dashboards
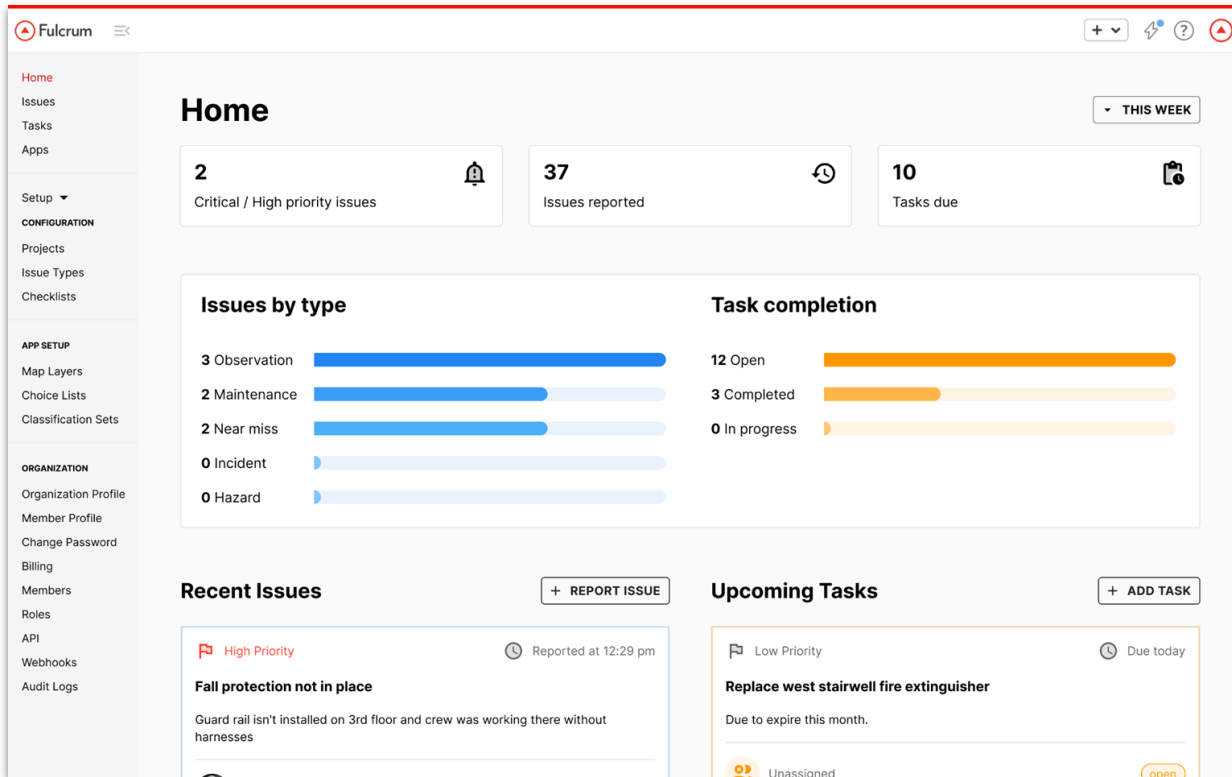


Provides real-time, consolidated view across all inspection teams on a single pane of glass

# Thank you for listening! Questions?



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