Putting the “I” in “team”
Quality inspections as a team sport

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**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

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

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

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

Within our constraints
We have unique requirements

- Size
- Aptitudes
- Attitudes
- Diversity

Find ways to level up our current teams

Biggest: We’re required to maintain a low-risk profile
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 a bank is just someone else’s mattress.

(And software as a service matters, too.)
Back to characteristics of teams
What processes enable us to change in tandem, appropriately, to better achieve our quality and other goals?

What characteristics should we focus on?

1. **Adaptability**
   - What processes enable us to change in tandem, appropriately, to better achieve our quality and other goals?

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

3. **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.
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
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
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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