



Ian Featherstone provides specialist business support & leadership coaching for the kitchen, bathroom, joinery and retail fit-out sectors.

Ian started as a cabinetmaking & machining apprentice in the 1980's and gained a broad range of practical and business experience in both private business and corporate roles.

He has been operating as Glass Half Full since 2012.



Smetric helps business leaders make smarter decisions faster through advanced analytics and business intelligence software and services.

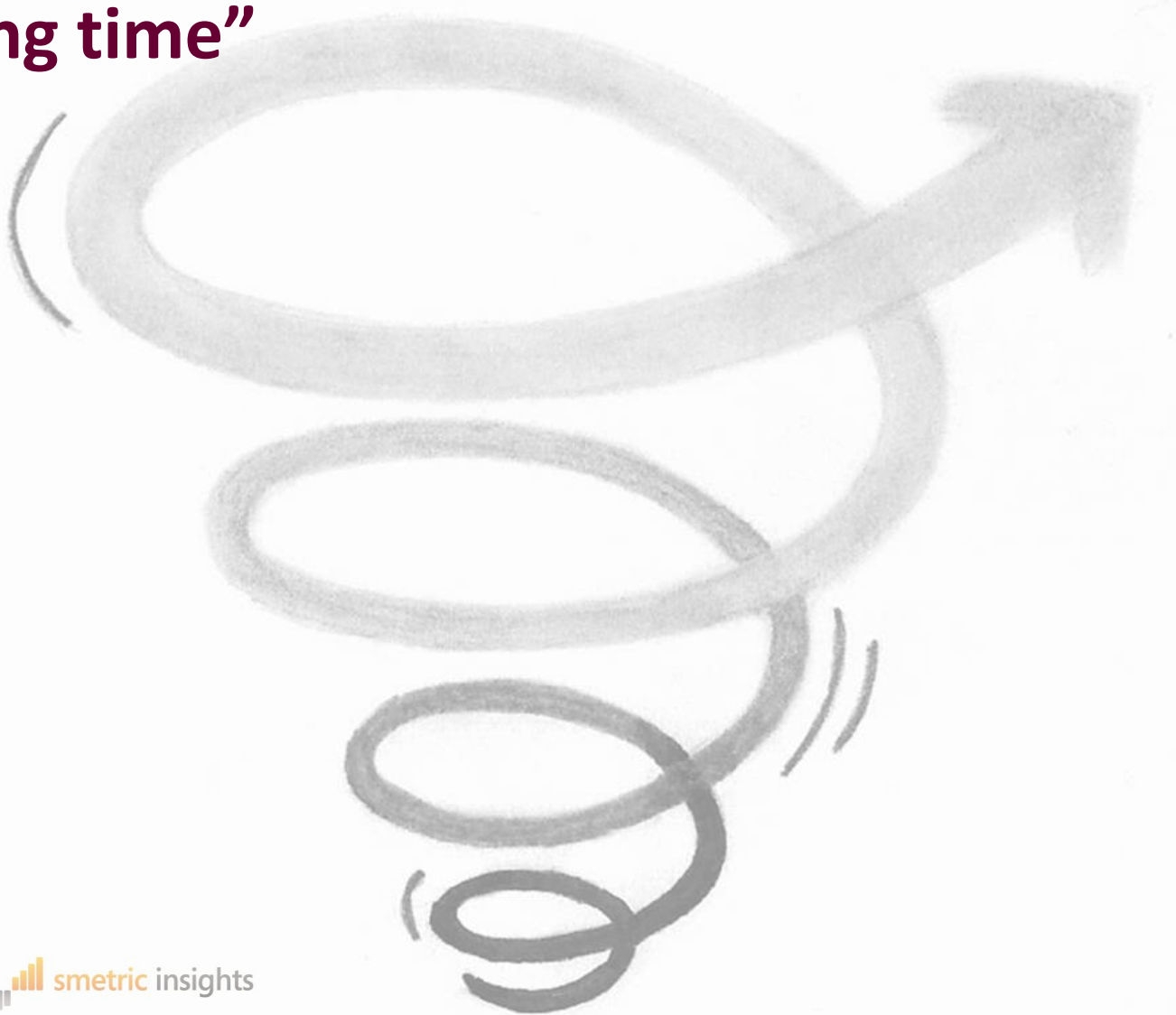
Today's Agenda – 6th October 2020

• What is a plan?	• Elements of a planning system
• Logic	• Communicating the plan and keeping on track

Please use the zoom chat box to make comments and ask questions, we can then answer and discuss at the end

“the main thing in business is to have profitable customers who want to stay with you for a very long time”

Dr Ian Brooks



Doing what we say we will do creates an awesome experience

3



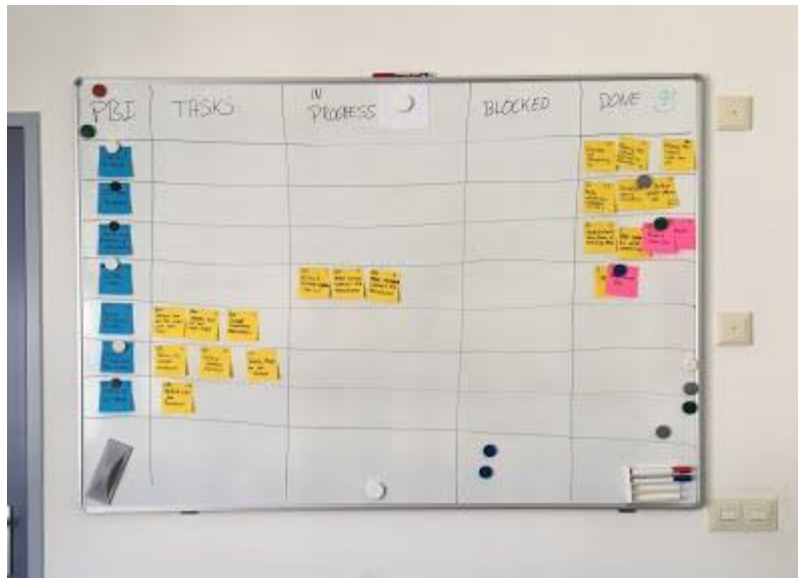
It's not just **WHAT** your customers buy from you. It's **WHY** they buy from you.



The last impression leaves a lasting impression!

Break down your jobs into logical steps, try and keep it simple.

Get Ready	Set	Go
Sales Quote Win	Measure Detail Cut lists/ Optimise Order materials	Make Deliver Install Final Bill

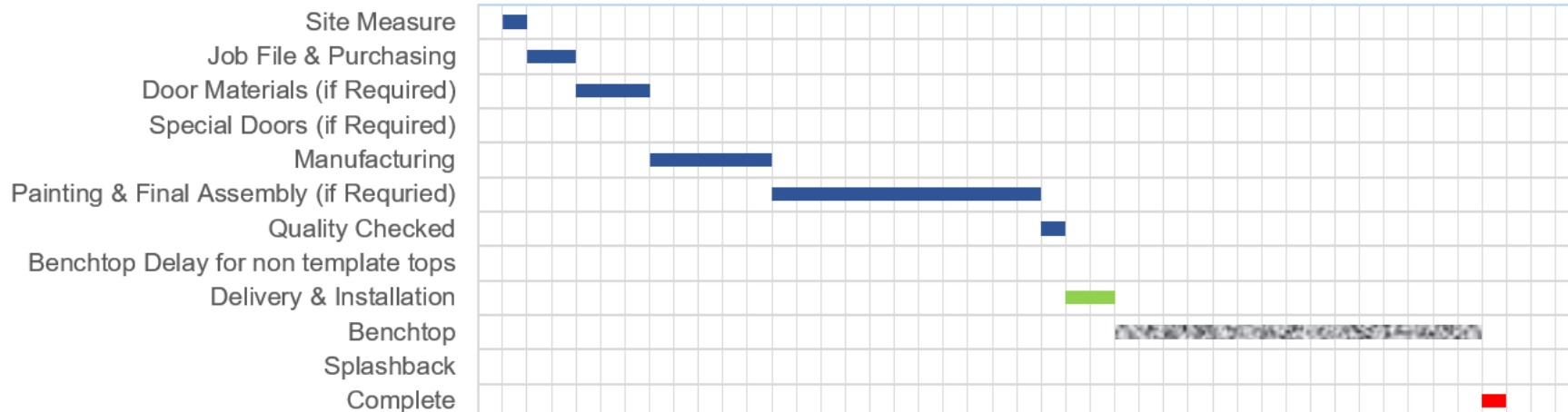


Understand your timelines – Make Sensible Promises

Cabinet Quantity	12	<-- Pick from list	<h2 style="color: red; text-align: center;">LEAD TIME CALCULATOR</h2>									
Next Available Start Date	1/11/2020	<-- comes from planning										
Site Ready for Measure	15/11/2020	<-- Enter Date										
Benchtop	Acrylic	<-- Pick from list										
Fronts	Veneer	<-- Pick from list										
Glass Splashback?	No	<-- Pick from list										
<table border="1" style="width: 100%;"> <tr> <td>Estimate Install Date</td> <td>17/12/2020</td> <td>Complete</td> <td>29/01/2021</td> <td>Workdays</td> <td>42</td> </tr> </table>			Estimate Install Date	17/12/2020	Complete	29/01/2021	Workdays	42	<table border="1" style="width: 100%;"> <tr> <td>Project length (days)</td> <td>75</td> </tr> </table>		Project length (days)	75
Estimate Install Date	17/12/2020	Complete	29/01/2021	Workdays	42							
Project length (days)	75											

Work Days from site measure

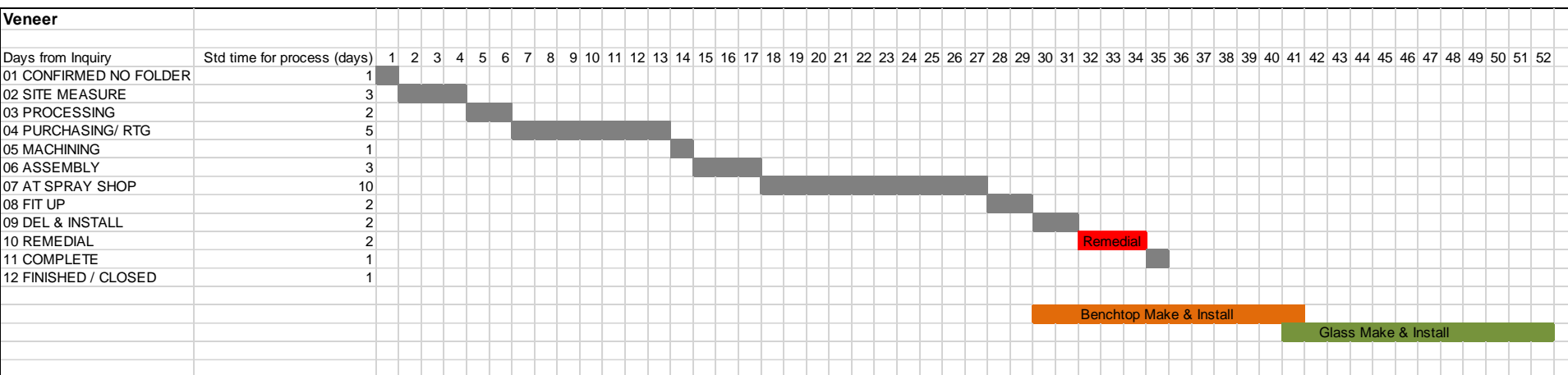
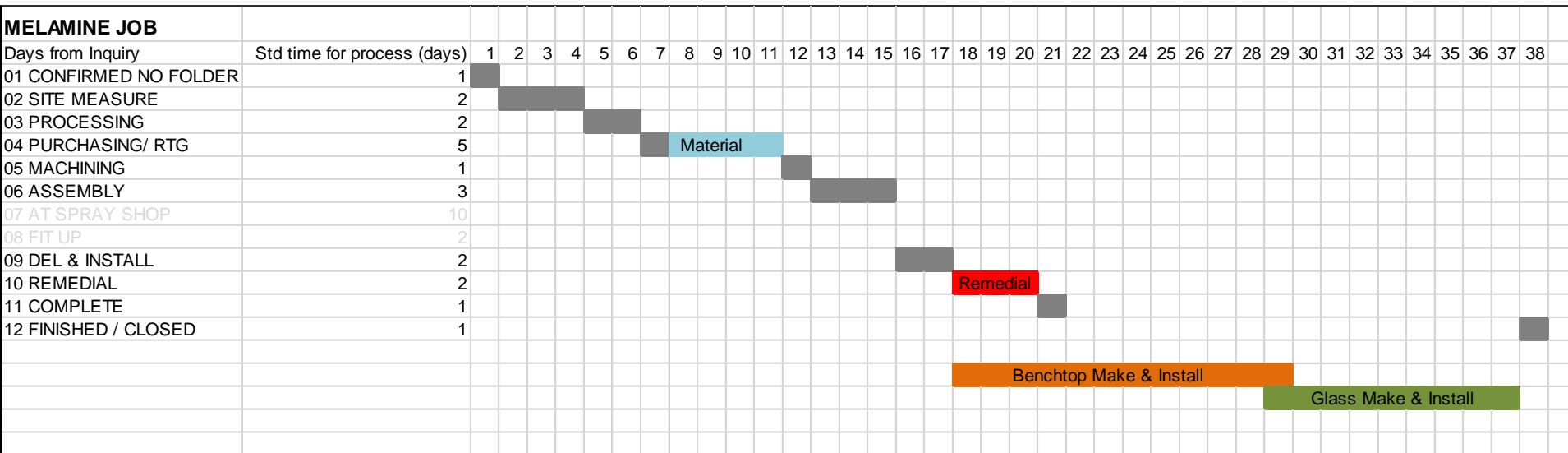
0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45



Click here to download working version
and talk to Ian for a custom version



[Lead Time Calculator Link](#)





Pass the Baton

To hand over a particular duty or responsibility to another

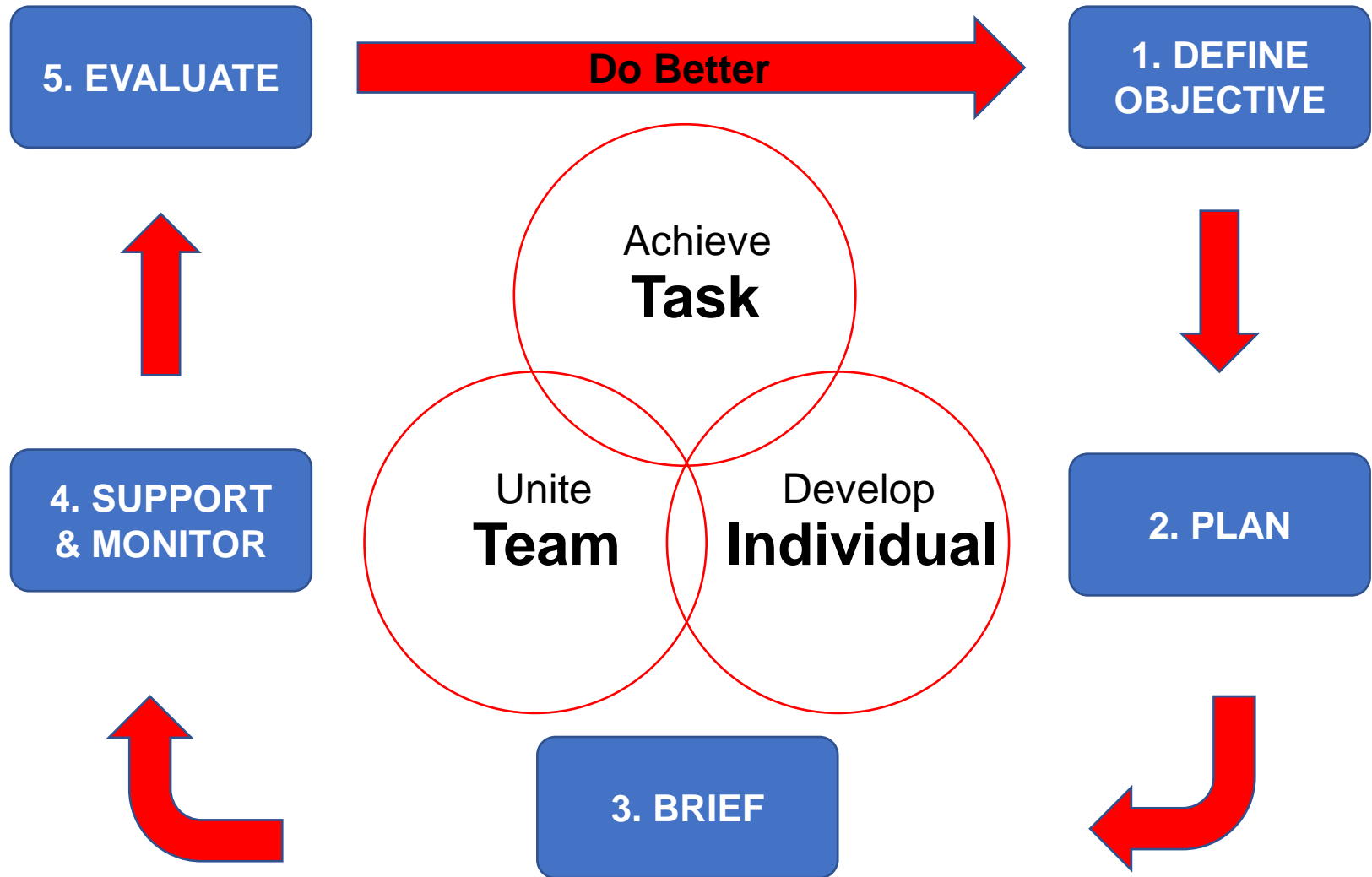


On time and with no splinters

JOB STATUS - ASSIGN RESPONSIBILITIES

Status Stage	Activity at this stage	Things that must be done before the baton is passed	Responsibility
00 Job Won	folder prep, details finalised	Job folder is complete, dates are agreed with customer, are achievable and are in system. Deposit received and cleared as appropriate	Sales
01 READY TO GO	measuring, processing, purchasing	Job file accepted by project managers, site measure done, , POs placed, CNC files, ready for machining, cut date set	Detailing
02 MACHINING	machining, hardware picking	Cutting, edging has is complete hardware is picked and parts delivered to assembly	Machine Shop / inwards goods
03 ASSEMBLY	assembly or waiting for assembly	All Parts cut , hardware picked and available, assembly is ready to start or is underway	Factory Manager
04 PAINTING	parts at polishers	(applies only to paint/lacquer jobs) Assembly is complete and parts requiring paint or laquer are with painter	Factory Manager
05 FINAL FIT	parts being re-assembled or ready	Assembly complete, parts are back from painter and attached to job, job has been QC, signed off, cleared & packed for delivery	Factory Manager
06 INSTALL	delivery and installation	Job has been despatched and delivery and / or installation is underway	Factory Manager
07 2ND INSTALL	2nd planned visit	(applies only to jobs were a planned 2nd install task is required, usually after glass, benchtop or flooring install for example)	Factory Manager
08 SNAG	finish offs	Job is complete, no remedial tasks remain, which is preventing the job from moving to complete status	Factory Manager
09 COMPLETED	paper work by project managers	Job is 100% complete (except for glass), all paper work, install QC, safety docs, instal times, returned to business, folder is complete and handed to Admin	Project management / processing
10 SPLASHBACK	glass manufacturing & installing	(applies only to jobs with templated or made to order glass) Glass supply and install is in progress, but not complete	Project management / processing
11 FINAL BILLED	final account, back cost	Final account sent, backcosting complete, exceptions and learnings shared with owner, sales or production as required, process improvement actions agreed and delegated	Admin / Finance

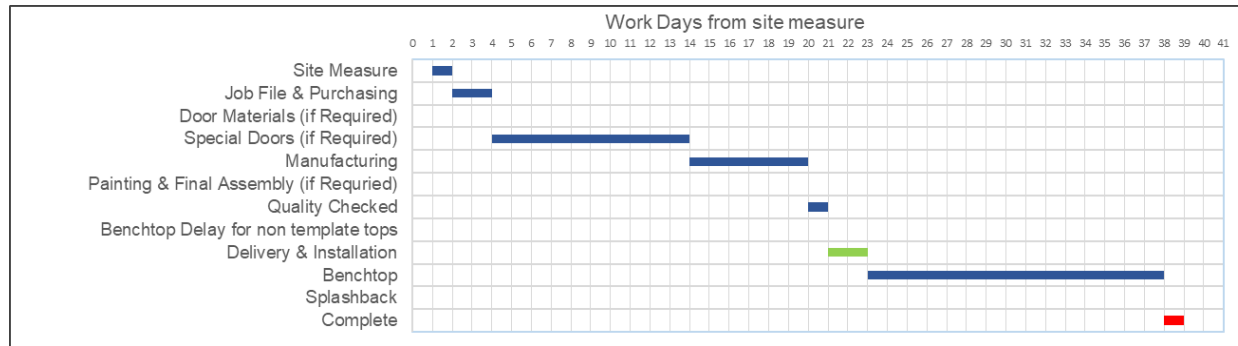
Action Centred Leadership Model – your role is to develop and unite



Capacity Planning

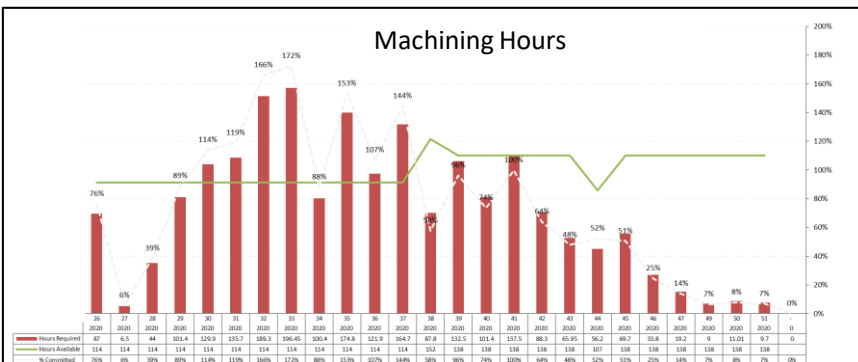
Inputs

- Work-centre capacity & assumptions (demonstrated productivity metrics)
- Job / Task dependencies, critical dates
- Hours required

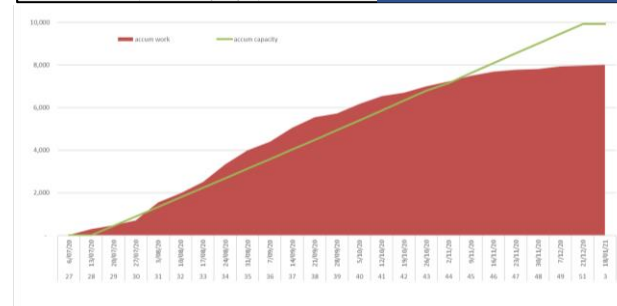


Outputs

- Capacity over or under supply, ability to make decisions in advance
- Work centre priority lists & visuals, keep teams focused on right task at right time
- Supplier Schedules – for outsourced products and subcontractors



Start Cut Edge Clean	Cut Edge Cleaned by	Current Actual	Job Name	Job Number	Sheet Qty	Machining Hours
30/06/2020	Thursday, 25 June 2020 02 CUT EDGE CLEAN				163	8.7
29/06/2020	Tuesday, 24 June 2020 02 CUT EDGE CLEAN				1	1.8
29/07/2020	Friday, 3 July 2020 02 CUT EDGE CLEAN				2	3
29/07/2020	Monday, 6 July 2020 02 CUT EDGE CLEAN				25	12
30/07/2020	Monday, 6 July 2020 02 CUT EDGE CLEAN				16	15
30/07/2020	Thursday, 9 July 2020 02 CUT EDGE CLEAN				25	15
30/07/2020	Thursday, 9 July 2020 02 CUT EDGE CLEAN				6	12
30/07/2020	Friday, 10 July 2020 02 NO FOLDER					12
30/07/2020	Tuesday, 14 July 2020 01 FOLDER READY					16.8
30/07/2020	Tuesday, 14 July 2020 02 CUT EDGE CLEAN				40	21
30/07/2020	Tuesday, 14 July 2020 01 FOLDER READY					11.2
30/07/2020	Tuesday, 14 July 2020 02 CUT EDGE CLEAN				25	10.2
30/07/2020	Thursday, 16 July 2020 02 CUT EDGE CLEAN				30	16.4
30/07/2020	Thursday, 16 July 2020 02 NO FOLDER					10
30/07/2020	Friday, 17 July 2020 01 FOLDER READY					8.7
30/07/2020	Friday, 17 July 2020 02 NO FOLDER					6
30/07/2020	Monday, 20 July 2020 01 FOLDER READY					4.3
30/07/2020	Tuesday, 21 July 2020 01 FOLDER READY				12	4.3



Tools – Manual Whiteboards or Spreadsheets are fine to to begin with¹²

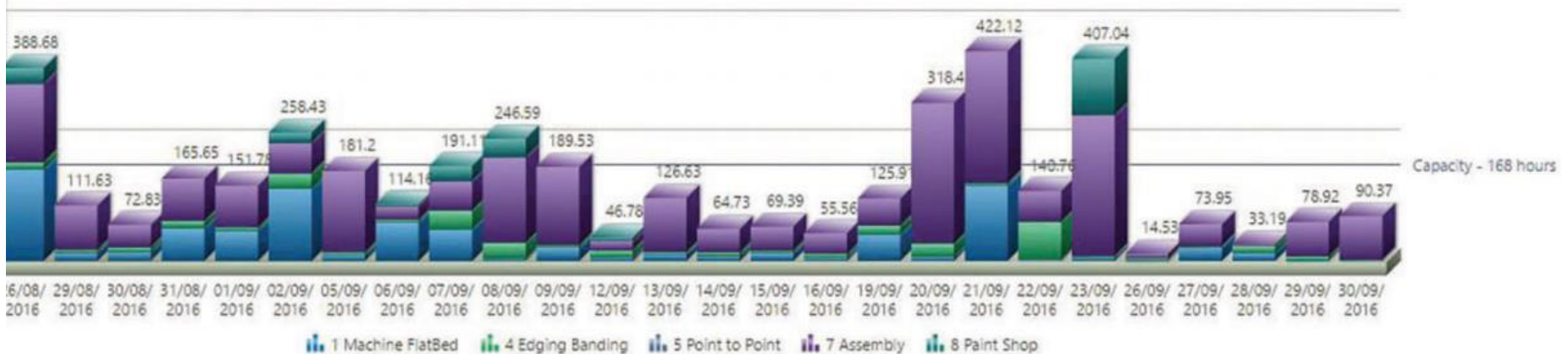
	00 Job Won	01 FOLDER READY	02 MACHINING	03 ASSEMBLY	04 PAINTING	05 FINAL FIT	06 INSTALL	07 2ND INSTALL	08 SNAG	09 COMPLETED	10 SPLASHBACK	11 FINAL BILLED
Jones		Melteca, Granite, 50 hours install 15-11										
Smith									Melteca, laminate, 30 hours install 01-10			
Warrington				Acrylic stone, 50 hours install 11-11								
Bob					paint, stone, 70 hours install 10-11							
ABC Builders							veneer, acrylic, 50 hours install 06-10					

week #	41	42	43	44	45	46	47	48	49	50	51
	6/10/2020	13/10/2020	20/10/2020	27/10/2020	3/11/2020	10/11/2020	17/11/2020	24/11/2020	1/12/2020	8/12/2020	15/12/2020
ABC Job	00 Job Won			01 FOLDER READY	02 MACHINING	03 ASSEMBLY	04 PAINTING		05 FINAL FIT	06 INSTALL	07 2ND INSTALL

Tools – choose what is right for you and your team

6/10/2020		ABC JOB	XYZ Job
7/10/2020		02 MACHINING	
8/10/2020			
9/10/2020		03 ASSEMBLY	
10/10/2020			
11/10/2020			check board
12/10/2020			02 MACHINING
13/10/2020			
14/10/2020			03 ASSEMBLY
15/10/2020		04 PAINTING	
16/10/2020			
17/10/2020			
18/10/2020			
19/10/2020			
20/10/2020			04 PAINTING
21/10/2020		05 FINAL FIT	
22/10/2020			
23/10/2020		06 INSTALL	
24/10/2020			
25/10/2020			
26/10/2020			05 FINAL FIT
27/10/2020			
28/10/2020			06 INSTALL
29/10/2020		07 2ND INSTALL	
30/10/2020			
31/10/2020		09 COMPLETED	
1/11/2020			
2/11/2020			
3/11/2020			07 2ND INSTALL
4/11/2020		10 SPLASHBACK	
5/11/2020			09 COMPLETED
6/11/2020			
7/11/2020			
8/11/2020			
9/11/2020			10 SPLASHBACK
10/11/2020			
11/11/2020			
12/11/2020			
13/11/2020			

Tools – Software Empower



< > today Jobs Due in the Week of 22 — 28 Aug 2016 month week

Mon 22 Aug	Tue 23 Aug	Wed 24 Aug	Thu 25 Aug	Fri 26 Aug
2321-J10 Watpac	2243-7011 Hansen - Yuncken E-E Hospital	2320-J06 Watpac	2243-7019 Hansen - Yuncken	2320-J03 Watpac
	2243-7015 Hansen - Yuncken	2320-J56 Watpac	2320-J17 Watpac	2320-J14 Watpac
	2243-7027 Hansen - Yuncken E-E Hospital	2321-J12 Watpac	2320-J41 Watpac	2320-J25 Watpac
	2243-7028 Hansen - Yuncken	2331 Paul Job	2320-J42 Watpac	2320-J29 Watpac
	2243-7037 Hansen - Yuncken		2320-J43 Watpac	2320-J36 Watpac
	2243-7048 Hansen - Yuncken		2320-J44 Watpac	2320-J40 Watpac
	2243-7049 Hansen - Yuncken		2320-J45 Watpac	2320-J51 Watpac
	2243-Rew Hansen - Yuncken		2320-J46 Watpac	2320-J52 Watpac
	2320-J18 Watpac		2320-J47 Watpac	2320-J53 Watpac
	2320-J26 Watpac		2320-J48 Watpac	2320-J54 Watpac
	2321-J07 Watpac		2320-J49 Watpac	2320-J70 Watpac
	+5 more		+15 more	+9 more

View in classic mode

White Jobs - Yet To Start, Green Jobs - Started, Red Jobs - Finished

Courtesy of
Empower
Software



EMPOWER

Tools - Task Factoryyyy – release soon and tested in joinery industry

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General

Tasks

Unsaved

...

Task Num	Task Name	Display Name	Task Date calc	Display on Tasks
1	50% Deposit balance du		0	<input type="checkbox"/>
2	Appliances delivered	Appliance del	-1	<input checked="" type="checkbox"/>
3	Bench install	Bench ins	16	<input checked="" type="checkbox"/>
4	Bench Install Stainless St		0	<input type="checkbox"/>
5	Bench template	Bench templ	2	<input checked="" type="checkbox"/>
6	Building work		-7	<input type="checkbox"/>
7	Installer callback	Installer callback	19	<input checked="" type="checkbox"/>
8	Check measure	Check measure	-42	<input checked="" type="checkbox"/>
9	Check order send plans .	Send plans	-19	<input type="checkbox"/>
10	Client final sign off fold	Client design sign off	-35	<input checked="" type="checkbox"/>
11	Client pre-delivery WH i	Client inspection	-1	<input type="checkbox"/>
12	Deliver bench template	Deliver template	4	<input type="checkbox"/>
13	Deliver skip bin	Skip delivery	-3	<input type="checkbox"/>
14	Detailed kitchen schedul	Schedule kitchen	-25	<input type="checkbox"/>

Dashboard

Leads

Customers

Resources

Schedule

Settings

Standard

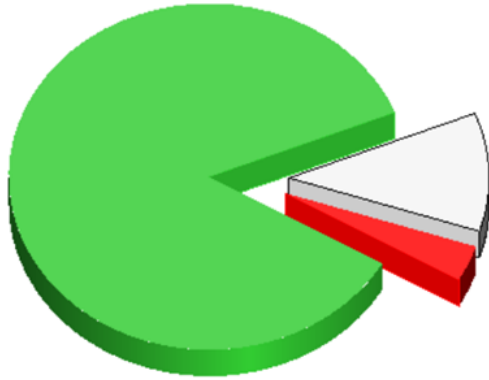
...

	Mon 05 Oct	Tue 06 Oct	Wed 07 Oct	Thu 08 Oct	Fri 09 Oct	Sat 10 Oct	Sun 11 Oct
Lee		Callback- Warehouse	** Multi **	Buntain- Callback	** Multi **		
Andrew S		** Multi **	DIPROSE- Installer callback	Lee-Install day one	Lee-Install day two		
ROB HAWORTH		ARNOLD- Install day four	** Multi **	** Multi **	GOMES & BORCHARDT- Install day one		
Nelson		HIGGINSON- Callback	SPARROW- Install day one	SPARROW- Install day two	** Multi **		
Andy H		HEATON- Install day one	HEATON- Install day two	HEATON- Install day three			
GRANT WHEELER							

Time Tracking – the best plans are based on current performance

Productivity Summary between

for Sub Factory Factory



	Budget	Actual	Percentage	Difference
Manufacturing	638.19	809.18	78.87 % productive	(170.98)
Downtime	0.00	104.62	∞% over budget	(104.62)
Unaccounted	0.00	31.62	∞% over budget	(31.62)
Hours Worked		945.42		(307.23)
Actual Manufacturing			85.59%	
(Actual Manufacturing / Hours Worked)				
Overall Productivity			67.50%	
(Budget Manufacturing / Hours Worked)				

Budget to Actual Hours for Month of

Job Reference	Job Name	Budget Hours	Actual Hours	Variance	% Variance
12345	job name	98	40	-58	-59%
12346	job name	60	27	-33	-55%
12347	job name	68	43	-25	-37%
12348	job name	59	42	-17	-29%
12349	job name	70	53	-17	-24%
12350	job name	20	5	-15	-74%
12351	job name	40	26	-14	-35%
12352	job name	45	33	-12	-26%
12353	job name	10	-	10	-100%
12354	job name	40	30	-10	-24%
12355	job name	310	301	-9	-3%
12356	job name	19	10	-9	-46%
12357	job name	41	34	-7	-18%
12358	job name	15	10	-5	-34%
12359	job name	5	-	5	-100%
12360	job name	15	10	-5	-31%
12361	job name	84	80	-4	-5%
12362	job name	25	21	-4	-17%
12363	job name	16	12	-4	-24%
12364	job name	5	1	-4	-73%
12365	job name	8	5	-3	-43%
12366	job name	12	9	-3	-27%
12367	job name	6	3	-3	-52%
12368	job name	15	13	-2	-12%
12369	job name	90	89	-1	-1%
12370	job name	4	3	-1	-17%
12371	job name	64	64	0	0%
12372	job name	18	18	0	0%
12373	job name	30	30	0	1%
12374	job name	7	7	1	13%
12375	job name	3	4	1	29%
12376	job name	117	122	5	4%
12377	job name	10	19	9	86%
12378	job name	100	111	11	11%
12379	job name	1	12	11	1122%
12380	job name	204	295	91	45%
TOTAL		1,734	1,583	151	9%

Courtesy of
Empower
Software



EMPOWER

Practise briefing, giving feedback, coaching, encouraging curiosity.

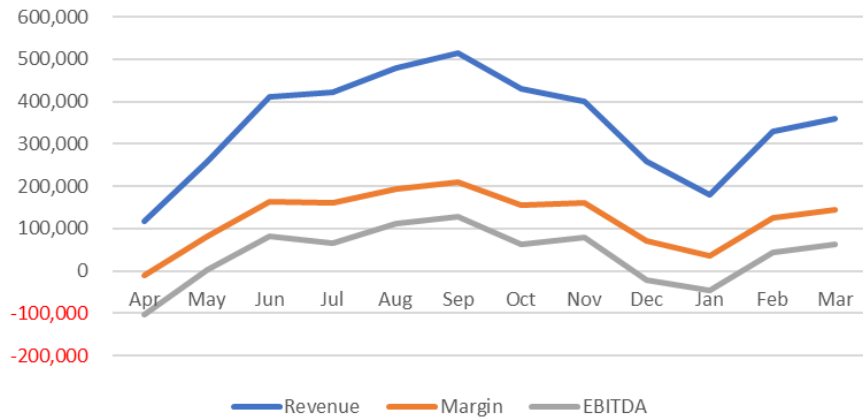


Decide on your rhythms of communication and briefing

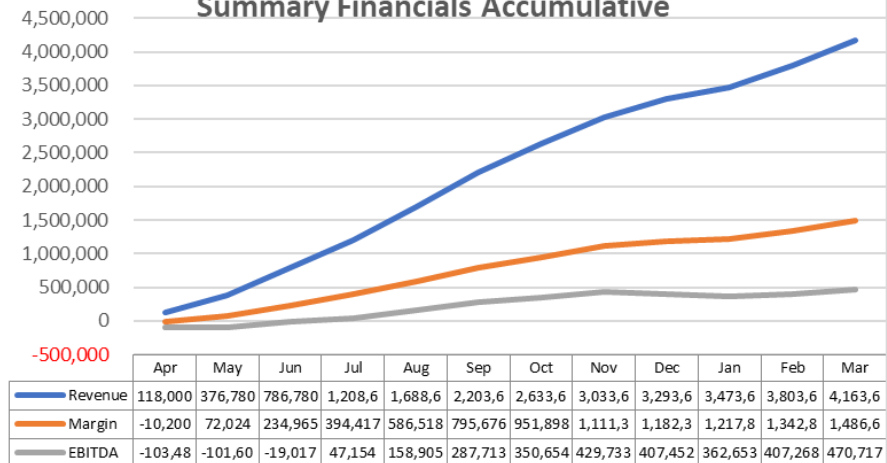
	Owner	When?	Frequency	Who?	Purpose	Process	Outcome
Office Meeting	?	Wed AM - 30 minutes	Weekly	Designers, programmers	Align, communicate team goals, review last week	Agenda and action items stored here	Engaged, aligned team
Factory Toolbox Meeting	?	Wed AM 7.30 - 30 minutes	2 weekly	Factory Staff, Installers (if possible) 1 x Director	Align, communicate team goals, review last week	Agenda and action items stored here	Engaged, aligned team
Sales Meeting	?	Tuesday 9-10am-1hour	Weekly	Designers & One of Directors	review, sales outcomes, obstacles, team alignment, marketing activities	Review pipeline Celebrate wins, learn from rest Forecast & Gap Agree future actions Top Priorities Top Learnings	Agree Priorities to deliver the monthly goals, understand current sales and goal to reach next week, month
Sales 1 on 1 Individual	?	varies 30mins to 1 hr	Weekly	Sales Manager and each designer	review prior week, plan current week, identify & navigate obstacles	1 on 1 with Sales Manager, review current leads	motivated, focused team, delivering results. Transparent plan
Scheduling & Planning	?	?	Weekly	?	A process to prioritise job sequence for processing and communicate the company game plan	use planning tool, review capacity, ensure dates as accurate as possible. Communicate plan to business and key sub-contractors. Understand extent of outstanding remedial work	1. Achievable plan in place, goals set for following week. 2. Every customer (or agent) has been communicated to about next steps at the right time
	?		Daily	?	Stay on track daily & review week gone and week ahead on every Friday	15 min conversation , review. Friday 30 minutes, look back at week review and week ahead	- everyone has tasks assigned for the following day at the end of each day
Operations Review	?	week 2 or 3 of each month	Monthly	?	Understanding of current performance and opportunities to improve. Make decision regarding future capacity	Review hours performance, downtime, capacity. Balance capacity or make decisions to balance	Agree and align, updated plan
Financial Review	?	week 2 or 3 of each month	Monthly	?		Review financial results, operational, stock and supply, marketing, pipeline understood	Agree and align, update forecast

Track Financials AND Capacity

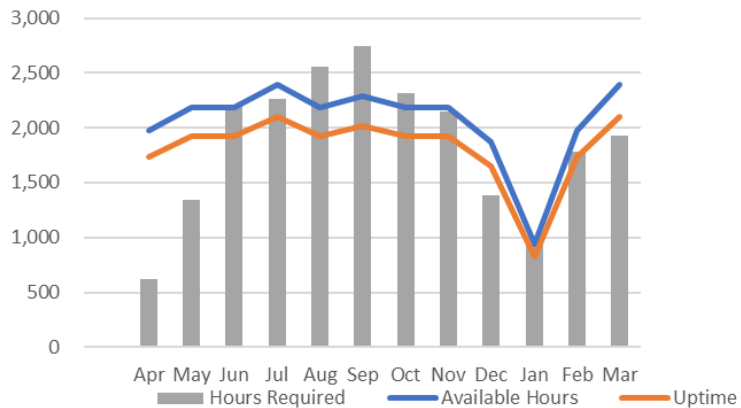
Summary Financials Monthly



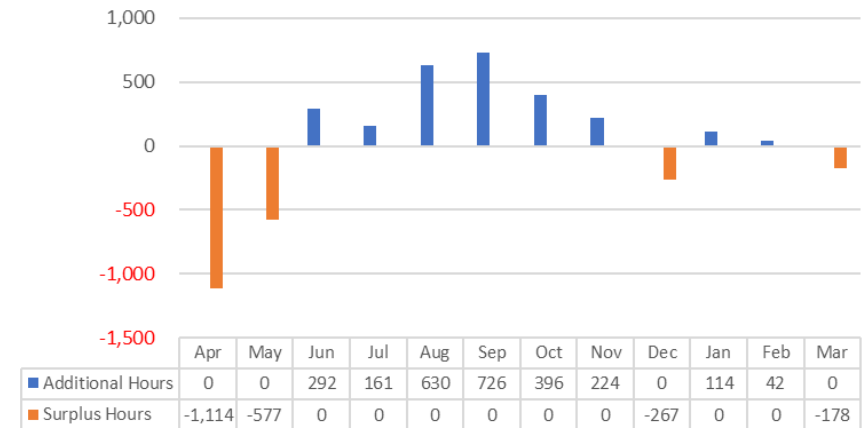
Summary Financials Accumulative



Capacity Planning



Additional and Surplus Hours



Thank you

If would like a complementary, no obligation follow up session, to see more, to get your started, or just to reach out for a chat, feel free to contact Ian.

A copy of this presentation will be made available to attendees.

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www.Facebook.com/Glasshalffull.co.nz/

Reference Pages Follow this page

Our main competitor is time



“The thing you can learn by watching the clock, is that it spends its time by keeping its hands busy”

Ken Winter
Danske Mobler Furniture



BE SPECIFIC - USE SMART OBJECTIVES

Specific.

Is there a description of a precise or specific behaviour / outcome which is linked to a rate, number, percentage or frequency?

Measurable.

Is there a reliable system in place to measure progress towards the achievement of the objective?

Achievable.

With a reasonable amount of effort and application can the objective be achieved?

Relevant.

Can the person with whom the objective is set make an impact on the situation? Do they have the necessary knowledge, authority and skill?

Time Based.

Is there a finish and/or a start date clearly stated or defined?

In other words;

“we will achieve X outcome by Y time to a defined standard”

Key elements of a robust system – do this in a way that suits your business

1. Estimating

- Include a calculation for Gross Margin, know this for every quote the company does
- Capture Labour & Materials % of sales at quote, be mindful of how this compares to the numbers in your P&L Model.

2. Job & Task Time Monitoring

- Put a system in place to capture time spent on jobs, down to major task level if you can (processing, machining, assembly, installation. be sure to add a re-work task too.
- include "down time" tasks. Define what they are, they are only for tasks that do not directly relate to a customer order. i.e. machine maintenance, general workshop cleaning (like the big end clean ups, not cleaning up after a job, that time is in the job, long meetings, some H&S, some training.

3. After a job is invoiced complete a **back costing process** to compare the **actual vs estimate**.

- materials total and specifics on major items.
- total time spent vs estimate for each task.
- amount of re-work time.

Calculate the totals for each month and understand the root cause of the top 3-4 variances and put improvement plans in place.

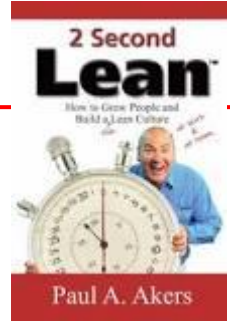
4. **Monitor downtime** monthly, weekly if possible, by team, by individual. compare this against what your assumptions are. You maybe surprised the first time you measure this, if you have not already.

5. Monitor the **sales mix** between different customers and categories of work.

6. **Use good leadership**, coaching and learning to brief, support, monitor, review, learn and then "do-better"

[illegible]

But don't use too many



2 second lean principle

<https://www.youtube.com/watch?v=6qhE4WicKoI>

the book

<https://www.youtube.com/watch?v=zbL4LwmWAg0&t=3914s>

<https://www.youtube.com/watch?v=zbL4LwmWAg0>

Morning meeting

<https://www.youtube.com/watch?v=nY8nec2wmCg>

Best of 2017

<https://www.youtube.com/watch?v=gnLZ7DSyptI>

Best Of 2018

<https://www.youtube.com/watch?v=9-M7xkkYXnI>

GPS Tape - Organize Your Tools

<https://www.youtube.com/watch?v=vewYgNMNDGM>

<https://www.youtube.com/watch?v=H9eKyKMr7W8>

<https://www.youtube.com/watch?v=7NL52gqwpXw>

toolbelt

<https://www.youtube.com/watch?v=mcvrF3X5LIk>

lean chair company

<https://www.youtube.com/watch?v=DlyfDMng2Ig>

3 pillars of lean

<https://www.youtube.com/watch?v=R1e0wlyz9hY>

more lean

https://www.youtube.com/watch?v=jYby_HczyDA

moving granite tops

<https://www.youtube.com/watch?v=Aju1MSIEK8U>

jack of all trades

<https://www.youtube.com/watch?v=VFriSAeggTI>

<https://www.youtube.com/watch?v=dfxE6RnEoqs>