



**Manufacturers Alliance**  
Sharing Education & Resources Peer to Peer

## EDUCATIONAL SEMINAR

# MANAGING FOR DAILY IMPROVMENT

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## SEMINAR SPEAKER



**Kacinda Ruiz**

Operational Excellence –  
Customer Experience/Quality

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# Managing for Daily Improvement

Kacinda Ruiz

Operational Excellence, Customer Experience & Quality  
Trane Commercial HVAC, Americas

March 12, 2020



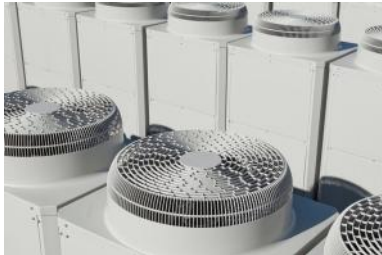
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## OUR BUSINESSES CORPORATE OVERVIEW



### COMMERCIAL HVAC

Air conditioning systems, services and solutions. Innovative solutions geared toward making high-performance buildings reliable and safe, as well as healthy, comfortable and efficient



### RESIDENTIAL HVAC & SUPPLY

Heating, cooling, thermostat controls and home automation for the residential market and a complete selection of innovative parts, options and accessories for optimal performance and reliability



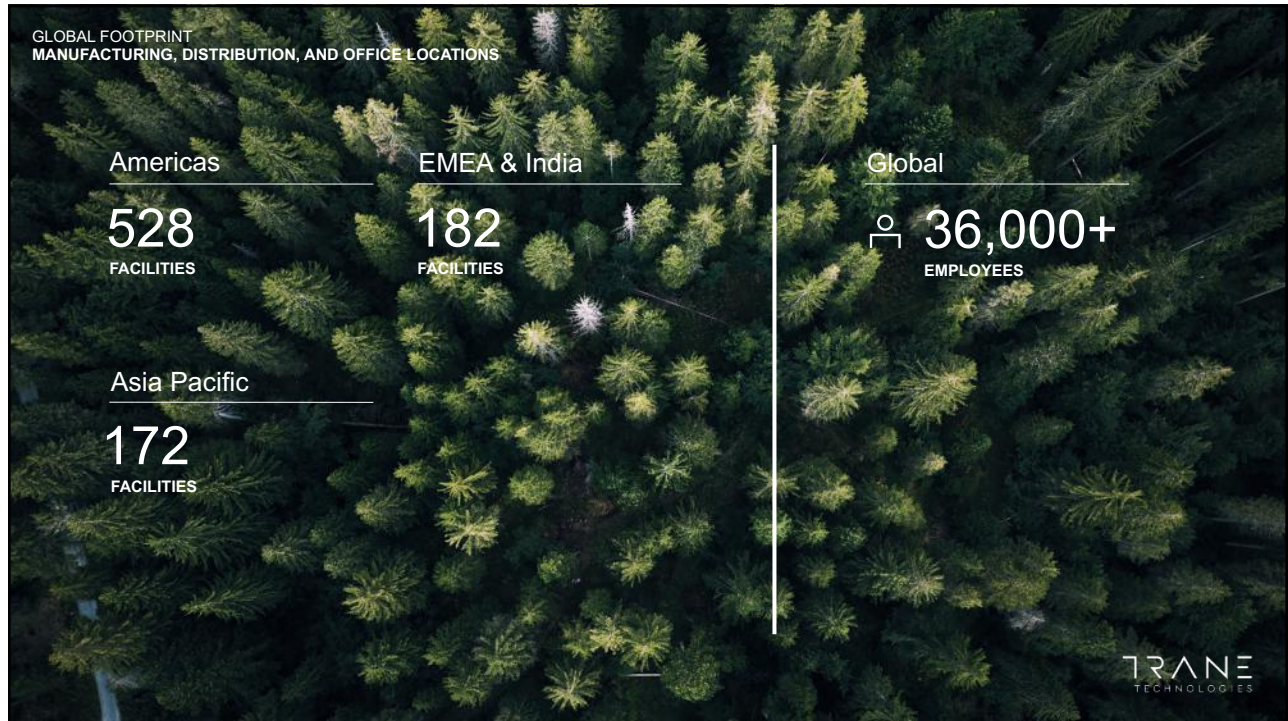
### TRANSPORT REFRIGERATION

Manufacturing and innovation of transport temperature control systems for a variety of mobile applications, including trailers, truck bodies, buses, shipboard containers and rail cars




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**At Trane Technologies MDI is a core element in our Business Operating System.**

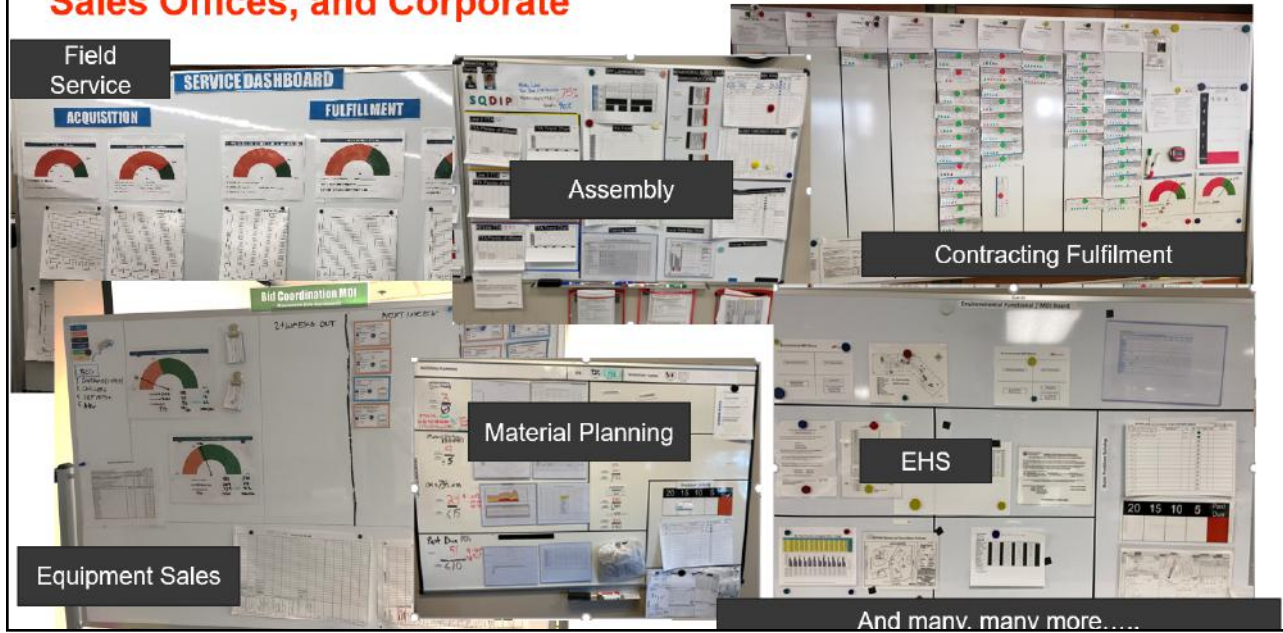
MDI is a **TEAM-BASED** review process for a part of the business held on a consistent cadence. A **VISUAL TOOL** which aligns team members. Drives process discipline and **IMPROVEMENTS** to the most critical metrics in order to **TRANSFORM OUR BUSINESS**.

When off track, the **TEAM** applies **PROBLEM SOLVING** and takes action with urgency.

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**MDI is used by teams across our business in Manufacturing, Sales Offices, and Corporate**

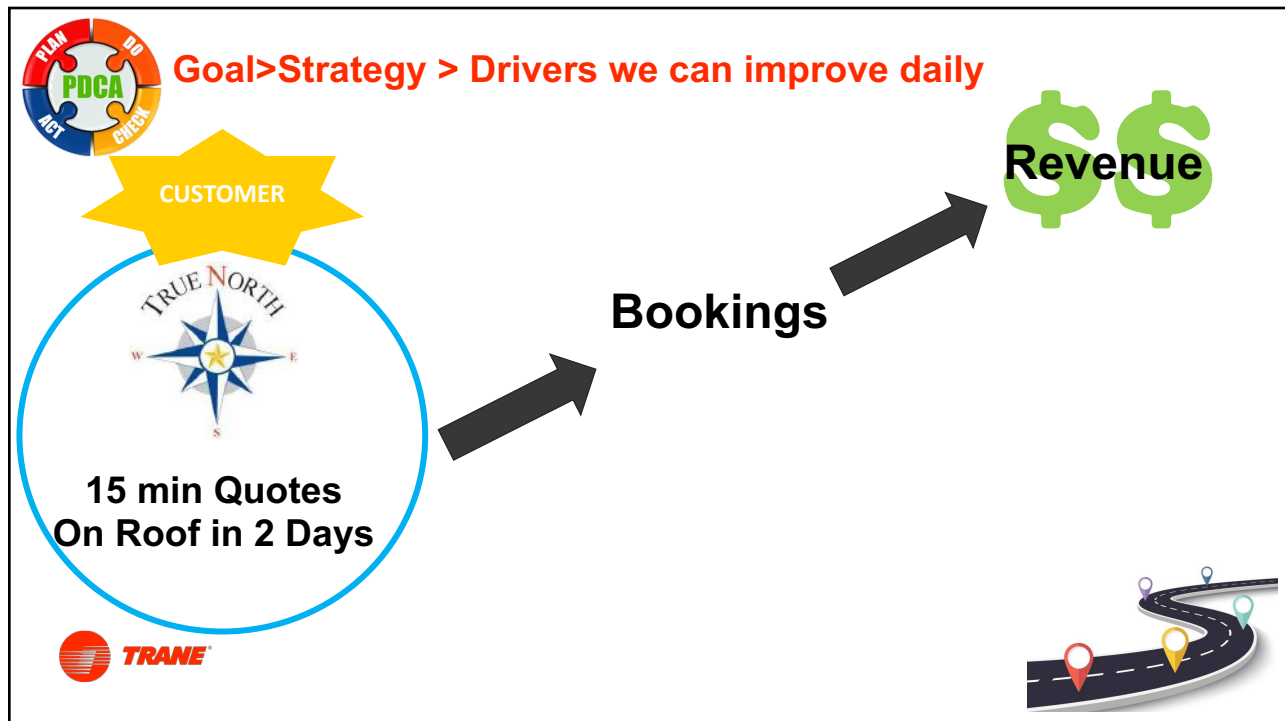


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**One team's MDI Journey begins...**



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QUOTE LEAD TIME (in 15 MINUTES)


2 1  
4/6 8.17 min

PLAN DO  
PDCA  
ACT CHECK

Problem Solving Schedule

	Day 5	Day 4	Day 3	Day 2	Day 1	- Post DUE -
Just DO IT (CPI)						
Steps	Day 20	Day 15	Day 10	Day 5		- On Hold -

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Quote Follow-up Added to increase closure rate.

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**\$3.2M in bookings vs. target of \$2.6M**  
Avg 5 quotes/day

**186 additional proposals**  
(88% out in 30 mins or less!)

**69 additional orders**

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**And then... we grew, and grew – one month saw FIVE TIMES the number of orders in the previous year....**



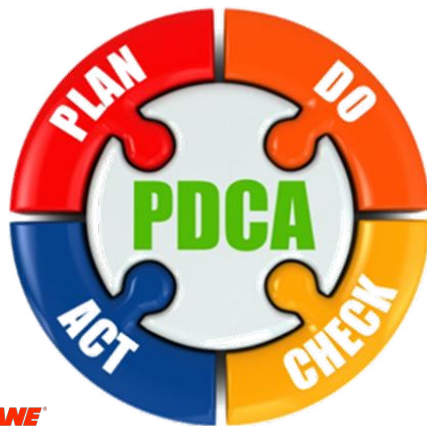
- The foundation was unstable – standard work was not being adhered to consistently
- Visual Management Board added to manage orders – project cards included key milestones
- New Metric added – “Orders without issues”
  - While we were meeting customer needs, our team members time was being spent firefighting issues along the way



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**The moral of the story.... Identify your drivers that can be impacted & improved each day. Continue to LEARN & Problem Solve.**



- for your *Customer*
- for your *Teams*
- for your *Business*



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## Some lessons learned along the way...

### Process

- Discipline! Implement standard work for the board, your meeting & your processes
- Perform confirmation checks on the MDI process
- Leaders: attend & support on set cadence
  - Ask thoughtful questions. Use MDI as a spark to more conversation off-line (aka: the MDI After Party)

***The board doesn't yield results,  
the process does!***

### People

- Ensure performance objectives are linked to metrics
- Provide MDI Training / Kick-off Workshop
- Encourage learning & the PDCA mindset
- Empower teams to problem solve & *Make each day a little better than yesterday!*
- Develop your team members' problem solving muscles

***Don't take away the learning!***



*The most important thing we can do each day is go see, ask why, listen & show respect to our teams by helping make their work life better.*

—Mark Donovan, Trane Commercial OpEx Leader

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## LEAN ENTERPRISE PEER GROUP

- ✓ Identify Best Practices from Industry Peers
- ✓ Receive Candid & Constructive Feedback
- ✓ Validate Your Path

**NEXT IN-PERSON MEETING: MARCH 24<sup>TH</sup>  
NEXT ONLINE MEETING: APRIL 7<sup>TH</sup>**

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