

LULU – competency-based training from the past

Written by Ian Hendra

Over the last couple of months, I've come across several clients who have been unable to tell me how much resource their wages bill pays for, or exactly how much capability they have in terms of something like person-hours per skill. So, how do you know you can do the work you take on? I ask: How do you avoid margin-crippling penal rates for overtime? And late deliveries: and disgruntled customers: and disgruntled staff? The answers are always the same, "Not a problem, Ian, we just do it, just like we always have done, we go from famine to feast. Our customers don't mind and our staff rises to the occasion...." At this point all I can see in my mind is the proverbial "Yeah Right!" Tui advert. And I remember the one spectacular case of the software house that, in blissful ignorance, took on a contract nearly ten times bigger than it could handle and ended up spending much more than the available margin on sub-contracting and financial duck-shoving.

Buckett Enterprises Ltd is a small family firm in the Waikato making a range of specialist pails for the hand milking industry. Founded by Russell Buckett (Rusty to his mates) who learned his craft as a bricky's mate hand mixing cement, Buckett's buckets are guaranteed to have no holes. They come with a patented handle designed to minimise "milker's knuckle", a well-known occupational syndrome not unlike tennis elbow. Buckett's buckets are in great demand, and not only in the dairy industry. Trouble is, demand is unpredictable, particularly around Field Days. Rusty's wife, Edna (née Cloud), is the business brains of the outfit having served her time in the accounts department of the local dairy factory...that's where she saw LULU for the first time. LULU was on the wall.

Or at least a LULU chart was on the wall.....and it was used to manage supply and demand on resources. It showed clearly and simply at any point in time who could do what and how many were available. The LULU chart saved work being taken on in the absence of the capability and capacity to do it, or the opposite, so it was a key item of information in the dairy company's quality system. Not only that but underpinned by documented training programmes, it was the visible manifestation of a truly "competency-based" system that delighted and enthralled the HR Department. Figure 1 is Buckett's LULU Chart that he referred to every day.

So, where did LULU come from?

This could be fairy tale, but it has that ring of credibility; and I've known about it for years. When the Great War broke out in 1914, skilled men across the Commonwealth left their jobs in factories and took up their posts in the trenches of northern France and the Dardanelles, of course. The picture from the Australian War Memorial of a troopship at a dockside evokes the feelings of the day. The war wasn't supposed to last long so little thought was given to replacing the skills needed to produce the supplies to keep an army in weapons, ammunition and all the other accoutrements necessary to conduct a military campaign.

Buckett Enterprises Ltd Monthly LULU Chart Date of this review; 29 Feb 2010

STAFF MEMBER	TAKE SALES ORDERS	PURCHASING	STORES	ASSEMBLY	HOLE SURVEY	GRIP TESTING	DESPATCH
Rusty Buckett	☐	☐	☐	☐	☐	☐	☐
Edna Buckett	┌	┌	┌	┌		☐	☐
Freda Buckett	┌				┌		
Justin Thyme	┌	┌				┌	☐
Liza Dear			┌		☐		
Thor Krench			┌	☐	┌		
Minimum needed	☐ x1 ┌ x2 ┌ x1	☐ x1 ┌ x1	☐ x1 ┌ x1	☐ x1 ┌ x1	☐ x1 ┌ x1 ┌ x1	☐ x1 ┌ x1	☐ x1 ┌ x1

Figure 1: LULU Chart – A simple control measure for both capability and capacity

LULU Key....	
Blank	= Not needed
	= Under training (one bar)
┌	= Competent under supervision (two bars)
┌	= Competent, un-supervised (three bars)
☐	= Able to train others (four bars)

Figure 2: The LULU key

In those days, of course, women did not go to work, that's the way it was, but as the war dragged on with its terrible cost in life and limb, women took to the workplaces to produce the supplies so desperately needed. Willing though they undoubtedly were, skilled they were not, so the need for a quick and simple competency-based training system must have become a matter of survival.

The LULU chart emerged as the tool. Each job was broken down into its constituent elements and people were assessed on their competency at each stage, day to day, probably, at least at first. A LULU chart was put on the wall for all to see, with a sequential marking system that was upgraded periodically upon review. Figure 1, Buckett Enterprises' LULU chart shows how it works and Figure 2 The LULU Key is self explanatory. Adding the "Minimum Needed" row per job sets the current view of the organisational capacity, and the individual ratings show its capability.

As usual the KISS principle wins every time, and there really is nothing new under the sun. Hope you find LULU useful in your organisation.

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