



Nico Ardans, right, medium cycle value stream leader at Peoria Gardens, marks a task completed during their weekly Policy Deployment meeting while others including owner Ben Verhoven (far left) look on. PHOTO BY VIC PANICHKUL

A shared focus

Policy Deployment management process can help nurseries focus, thrive and achieve their goals

BY JON BELL

SINCE ITS FOUNDING in 1984, **Robinson Nursery** in McMinnville has been run in a fairly typical fashion: Plans, goals, priorities and just about everything else has come from the top and made its way down through the ranks.

It's a system that has worked well for founders Rick and Roxanne Robinson and their two sons, Chris and Josh, both of whom are co-owners.

But a few years ago, the nursery decided to try something different. Something that would keep the company from becoming siloed. Something that would get every employee focused on the same goals. Something that would give everyone a say.

Something called Policy Deployment.

What is it?

Developed in Japan after World War II — and also known as Hoshin

Kanri — Policy Deployment is a way to link, align and focus every employee in a company on the same goals and the means to achieve them. It's famously been used by Toyota, but over the decades, its implementation, like that of the related Lean Manufacturing approach, has spread across industries.

In just the past few years, it's made its way into several Oregon nurseries, including Robinson Nursery, and led to some impressive results.

"The top-down system works really well, but I personally like this method better because it's more sustainable," Chris Robinson said. "The goal of Policy Deployment is to link, align and focus on common goals. But you let everybody come up with the goals so that they take ownership and take it on together. In my career, this has been the most powerful thing I've been a part of as far as creating

change and accomplishing the goals that we've set out to."

Rallying the troops

In simple terms, Policy Deployment is a management system that helps companies identify their goals and work together, across the entire company, to achieve them. It involves every level of the company.

"It doesn't matter if you are the executive or at the bottom of the org chart," said Jeff Stone, executive director of Oregon Association of Nurseries, which is now in its second year of Policy Deployment. "Everybody is involved and everybody is accountable."

Robinson said implementing Policy Deployment typically starts with a company identifying its mission, vision and values.

"The first step is to come up with a purpose to your company so you have something to rally the troops around," he said. ➤➤

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From left: Ben Verhoeven, Sarah Noble, Elizabeth Peña, Mark Blye, Eric Morales, Nico Ardans and Zak Burke-Wolfe go over the Policy Deployment updates at Peoria Gardens. PHOTO BY VIC PANICHKUL

Next comes a SWOT analysis — the acronym stands for strengths, weaknesses, opportunities and threats — which helps identify where a company is strong, where it is challenged and how it can improve. Based on that, the company comes up with three- to five-year goals, one- to three-year initiatives and one-year improvement targets.

All of those make their way onto a large display, which includes the goals and initiatives, followed by the improvement targets, each one of which gets what's known as a “swim lane.” Every target has a team lead, as well as goals and deliverables, which are identified and updated via sticky notes across the 52 weeks of the year.

While such a display may seem almost antiquated in this digital day and age, having it out in the open and visible makes it easier for people to visualize what's ahead and be accountable for their various tasks.

“It provides a really nice snapshot for everyone,” said Sarah Noble, office manager at **Peoria Gardens**, which implemented Policy Deployment in 2019. “If we didn't have the visual macro plan, I'd have notes on notebook paper, other people might be using their phones. This is all in one spot and is a super useful tool.”



Rick Peters conducts a training on Policy Deployment. He said the real benefit is it helps to focus and maximize available resources towards goals set by the organization. PHOTO COURTESY THE PETERS GROUP

Policy Deployment also entails efficient weekly meetings where team leads talk about key wins, progress, setbacks and whether or not they need any help.

Stone said the idea of weekly meetings at first gave him pause.

“Staff meetings for us were few and far between under our old model,” he said. “I couldn't stomach the idea of being stuck in meetings and thinking about what else I could be working on. But now, they are a half an hour each week at breakneck speed. It works well.”

Executing a strategy

Elizabeth and Rick Peters are business consultants and the owners of **The Peters Co.**, which helps companies implement Lean principles and Policy Deployment. They worked with Robinson, Peoria Gardens and OAN on their respective Policy Deployment systems.

Rick Peters said a better term for the methodology would be strategy deployment, because it's about not only developing a strategy, but executing it.

“The real benefit is it helps to focus



Robinson Nursery co-owner Chris Robinson meets with his leadership team to go over progress in their weekly Policy Deployment meeting. PHOTO BY VIC PANICKUL

and maximize available resources and target, ultimately, the longer-term goals that have been set for the organization,” he said. “The nice thing is, it also provides a correcting mechanism to get back on target should you deviate. You are checking yourself weekly. If you are deviating or getting behind schedule, it shows up real quick.”

“Another good thing, especially for nurseries, is that it helps everybody in your organization know where you are trying to go as a leader,” Elizabeth Peters added. “You limit your goals to three or so and learn how to communicate them really well. What happens is, you end up engaging more people.”

Implementing Policy Deployment is not without its challenges. For starters, the initial process requires four days, including coming up with a macro plan.

“It’s grueling,” Rick Peters said. “The first two days, there is just no way that I know of to cut that short. That’s the hard part. The fun part is the following couple days.”

Additionally, it can be tough to set up measurable goals in the first year — “Something that’s not too hard to achieve but not too deflating if they don’t hit it,” Rick Peters said — and if you don’t stick to the weekly meetings, you’ll likely be off track in no time. Companies also >>





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need to have a solid culture and strong leadership.

“Every organization, even a prison, will have a culture,” Rick Peters said. “In the absence of strong leadership, your culture will go south, it’ll split into factions.”

Long-term benefits

At the OAN, Policy Deployment is helping the organization run even more efficiently than it already was.

“I don’t mind bragging that we have the gold standard of staff in this industry,” Stone said, “but part of going with Policy Deployment is to not rest on our laurels. Even the best have ways we can do it better.”

One of the big goals for OAN is to develop and deliver the next iteration of the association’s popular Nursery Guide. Though it was a first-of-its kind when it debuted online 10 years ago, the Nursery Guide is nearing the end of its lifecycle and needs to be reimagined and revamped so that it continues to be a valuable resource to members. OAN is using the Policy Deployment process to move the project forward.

“(Policy Deployment) has really helped staff work better together. I am grateful for forcing this old dog to learn a new trick,” Stone said, noting that OAN is also working on other priorities, such as identifying new revenue sources and launching a new marketing department. “We looked in the mirror and said, ‘We need to do this.’ For that, we are better



Robinson Nursery Production Manager Gabriel Mendoza updates managers on his progress during the team’s weekly Policy Deployment meeting. PHOTO BY VIC PANICHRUL

now than we were two years ago.”

At Peoria Gardens, Noble said the company made solid progress on its improvement targets last year, including reducing overproduction.

“I think Policy Deployment just allows you to have valuable conversations that you wouldn’t have otherwise,” Noble said. “And it really does build teamwork, which is an important part of our culture.”

That’s happened at Robinson Nursery as well. Because of Policy Deployment, one improvement target had three leads — one from sales, one from marketing and one from maintenance.

“Before, they would have never really interacted on a project,” Robinson said,

“but here they had a huge project to work on together. I think that really strengthens the departmental communication, and because of that, morale of the company goes up too.”

Gone as well is the top-down system of yore, replaced by one that’s more inclusive and gives employees from across the company a chance to offer input on common goals and priorities. Robinson has also seen the fruits of Policy Deployment via the creation of a bilingual supervisor training program that he had long envisioned but could never put together on his own. By involving more people through Policy Deployment, Robinson’s longtime dream became a reality.

And, perhaps most importantly, Robinson also said that Policy Deployment has been good for business.

“For us to spend time on something, it really has to affect the bottom line,” he said. “I would say it’s drastically increasing our profit margin over time. I’m pretty sure we will be doing Policy Deployment for the rest of my career, and I imagine it will live with the nursery as long as it’s here.” ©

Jon Bell is an Oregon freelance journalist who writes about everything from Mt. Hood and craft beer to real estate and the great outdoors. His website is JBellInk.com

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