Change Management Strategies for Implementing Continuous Improvement Software

Accelerate the pace of positive change.

KaiNexus

Introduction

Implementing KaiNexus is a massive step in transforming your organization through incremental improvement. People react very positively to the concept of continuous improvement. However, they are a little less enthusiastic when it is framed as constant change. But, of course, improvement requires change.

As a leader, you will set the stage for your organization's adoption of your new tool for accelerating improvement. Our successful customers have shared some valuable advice to help you and your team reach your most important goals.
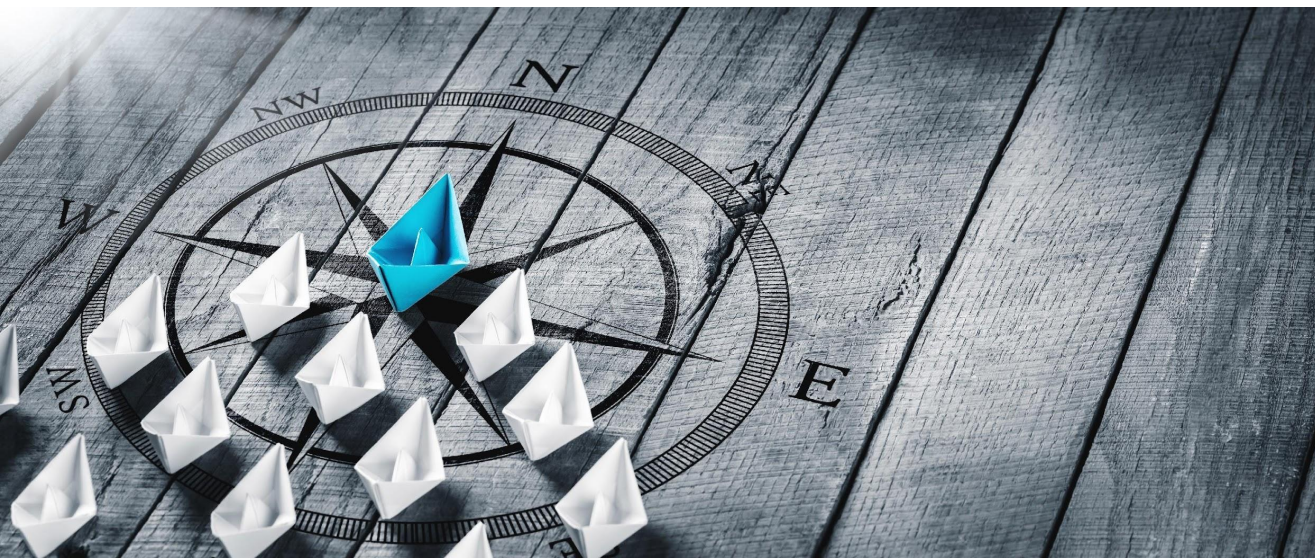
Drive Safety, Quality, and Customer Satisfaction

This eBook was written with KaiNexus customers in mind, however, even if you decide to implement a different solution, the information will still provide value no matter which solution you choose.

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Chapter 1

LEADERSHIP: WHAT IT TAKES TO DRIVE TRANSFORMATION

What leadership behaviors reduce resistance to change and increase confidence in a successful rollout?

KaiNexus software can help spread and sustain a continuous improvement culture, but it is not a magic bullet. Before process improvement technology can be useful, there must be at least the start of a culture that will welcome it. Employees need to feel safe offering and acting upon ideas. Managers must be skilled at coaching and managing through change. Finally, executives need to be clear that improvement work is a top priority. When those conditions exist, the improvement platform is far more likely to be used to its full potential.

Our experience has proven that the following leadership behaviors will help set you up for a successful technology implementation and long-term adoption of the solution.

Acknowledge that Most People Don't Like Change

People balk at trying new things for several reasons, including risk adversity. It's much easier to keep doing the same thing and getting the same results than to experiment with something that might fail.

It pays to acknowledge this and let everyone know that trying something that doesn't ultimately work is all right. It's the constant learning and experimentation that will eventually lead to better processes and outcomes.

Tap Into Hope

Even as people resist change, most know that there are things that can be improved. If you start to build a culture that embraces change by tackling the problems that frustrate employees, you can set the stage for success. Keep the focus on improvements that help people do their best work.

Identify Advocates and Influencers

Within every organization, you will find some people who are more open to new things than others. Find these people and enlist them in your efforts to get employees excited about implementing KaiNexus. They can be put in the position to mentor others or lead improvement projects. Don't let the org chart limit who you enlist in your pro-improvement coalition. It will be more effective if people in all departments and at all levels advocate for positive change.

Provide Structure

When you say "change," some people will hear "chaos." They are not crazy. They've probably seen many attempts at software implementation go wrong. That's why it is essential to talk about managed change made after thoughtful deliberation. Implementing change management software will help reinforce that there will be a systematic, controlled approach to improvement.

Focus on Alignment

Everyone must understand that changes are made to further strategic goals aligned with the roles and responsibilities of each individual. There should be a clear line between the factors used to evaluate employee performance and the organization's most important objectives. When people appreciate the vision and their place in it, decision-making and enthusiasm will improve.

Celebrate Small Wins Often

Change doesn't have to be disruptive or revolutionary to make a difference. Companies that are great at continuous improvement get there through a series of incremental changes that produce results. The more of these that you can identify and celebrate, the better. Improvement is contagious, and when people are recognized and rewarded for implementing new ideas, others will catch on.

Foster Communication and Transparency

Not every improvement project will go smoothly, and that's OK. What's important is to talk about the experience and learn from each attempt at change. Communication should be both top-down and bottom-up, and people should feel free to express their frustrations and challenges.

Measure Activity, Engagement, and Results

It's challenging to lead a culture of continuous improvement without visibility into the efforts of your team. KaiNexus will make it easy for you to understand who is actively working on improvement projects, the level of engagement, and the impact of each process change. Sharing those metrics will signal to the organization that positive change is a priority.

Leading your team through an era of constant change won't always be easy, but the alternative is stagnation. The good news is that if you can get past the initial fear and inertia, people can get excited about creating better processes and achieving objectives once considered impossible. It only takes a few tiny sparks for the fireworks to begin.

Chapter 2

EMPLOYEE ENGAGEMENT: ADDRESSING THE EMOTIONAL IMPACT OF CHANGE

How leaders can increase adoption by paying attention to the feelings that accompany anything new.

By the time an organization invests in software technology to support continuous improvement, they've usually embraced the idea that improvement should be a daily activity practiced by everyone in the organization. In addition, they realize that the people closest to the production of value for the customer are the ones who are in the best position to identify and resolve problems.

But not all improvement software rollouts are successful. You can pick the best technology platform on the planet, but it is useless if people won't use it. Often managers are focused on the training aspects of a new software implementation, and rightly so, but user adoption should be a parallel concern. Here are several things you can do to get your team fully on board with your new improvement management solution.

Have Empathy

There's a reason that improvement in the workplace is so hard to sustain. People don't like change and tend to revert to the more comfortable, old way of doing things. This is true for any change, new software included. While the solution's benefits may seem obvious to you, keep in mind that you are asking people to change their habits, learn something unfamiliar, and do things differently. Once you accept this reality and develop some empathy, you can lead people down the path to adoption in a way that improves your shot at success.

Tap into the "Opportunity Backlog"

Most people in your organization already know that things can be improved. If you talk to anyone, they can probably come up with a list of pet annoyances. You'd probably hear about red-tape issues, mundane tasks, too many meetings, workplace disorganization, etc. These irritations fuel your improvement software rollout because they are precisely the types of opportunities for improving your platform is designed to collect and resolve. After all, implementing a system for positive change is an acknowledgment that progress is possible. Most people find this refreshing and exciting.

Communicate Effectively and Stay Ahead of the Rumors

Where direct communication is absent, misinformation will flourish. That's why it is essential to allow team members to express their concerns and questions. The more people know about the software you will implement, why you are doing it, and how they will be impacted, the better. If possible, share all the information with everyone at the same time to avoid it becoming distorted. When you hear of any untrue rumors circulating through the staff, address them quickly and directly.

Expect a "Depression" Phase

In change management theory, a phase called depression or chaos comes immediately after starting something new. Acknowledge to the team that the first days or weeks of using a new software platform can be difficult. Be prepared to offer both training and emotional support. The depression phase won't last long; soon, you'll get to a point where people wonder how they ever managed before.

Address Pessimists Individually

You may have detractors who are actively opposed to implementing improvement software. Perhaps they have a particular reason for their opposition, or maybe they are strong resistors to change generally. It is best to talk to them individually because people tend to be less hostile in personal meetings. Negative attitudes are contagious, so you want to get to the cause of it before it affects the entire team. Everyone is entitled to fears and doubts, and they should be encouraged to speak up; that's the point of continuous improvement after all.

Expect the Implementation to Reveal Other Problems

Some of the challenges you experience in your quality software rollout may have nothing to do with the technology at all. People may be unhappy with how the solution is rolled out, internal procedures, or other management aspects. There may be other systems that don't work well, and your new improvement software will make these more apparent. Look at your implementation as a chance to learn more about adjacent processes and procedures.

Make it Useful

People tend to use things that are useful to them (folks are funny that way). When employees understand that a critical goal of KaiNexus is to make their work more productive, more enjoyable, and more important to the company, they gladly accept and leverage the tools designed to help. Too often, we see leaders focus only on the benefits that improvement brings to the company's bottom line and miss the point that workers benefit as well.

Create and Celebrate Quick Wins

There are two parts to this tip. First, broadcast and beat the drum for every success related to the rollout itself. Did everyone get trained? Was the first opportunity for improvement submitted? Have your boards been configured for each location? If so, be sure to give those involved a big pat on the back. The second part of this tip is to identify an opportunity for improvement that can be implemented quickly and use the system to do so. That way, people will see that the software can be a valuable tool for improving their work.

Make it Fun

There are many ways to make using Kaizen software fun. You can implement gamification by rewarding the person or team that enters the most opportunities for improvement or gets the most measurable impact from improvement. You can use it to manage event planning for holiday parties or outings. Maybe you announce the most innovative, out-of-the-box idea for improvement once a month. Whatever approach you choose, bringing a bit of fun and humor to your Kaizen culture isn't a bad idea.

Give it Time

Just like continuous improvement is a daily process, software implementation with high user adoption takes time and attention. The requirement isn't that everyone will be immediately proficient on day one; instead, the goal is to get a little bit better and a little bit broader over the first days, weeks, and months.

Chapter 3

MAINTENANCE: ENSURING LONG-TERM ADOPTION AND OPTIMIZATION

Has your organization started a quality improvement program with great fanfare and a ton of enthusiasm only to see it peter out over time? If so, you are not alone. Starting down the path to continuous improvement is easy. Sustaining momentum is not.

This chapter examines some of the most common reasons that CI software implementations go off the rails and how you can avoid or recover from them.

Minimize Competing Priorities and Short-Term Thinking

When organizations roll out a continuous improvement platform, they generally do it on top of the other activities that people are already doing. Rarely are other things moved off employees' plates to make room for learning the solution, let alone practicing daily improvement. So it's not surprising that people revert to the old way of working and thinking.

To avoid this problem, it is essential to find ways to bring improvement work to the top of mind. That doesn't mean that daily tasks should be neglected, but people need to be taught how to address processes on more than one level. Ideally, your team will be thinking about what they need to do to accomplish what needs to happen today while at the same time considering how the process could be better in the future.

Huddle meetings where improvement projects are discussed are constructive for bringing Continuous Quality Improvement to the forefront. In addition, KaiNexus includes notifications and alerts to ensure that people are reminded about CQI work.

Align Goals

If your improvement progress and use of KaiNexus are faltering, it is a good idea to examine how the performance of individual employees is measured. It is common to find that the way each team member is evaluated has nothing to do with the overall goals and objectives of the organization. In this situation, individual decision-making will be out of sync with key objectives, and a clear path to success can not be expected.

This can be addressed with strategy deployment. The game-changing objectives of the organization are crafted, and each "must-achieve" goal is cascaded from the executive level through each department, team, and employee. Thus, every person has a clear vision about how their work relates to the strategy, and employee performance is evaluated in this light.

Remove the Fear of Failure

The impact of company culture on the success of quality improvement programs can not be understated. By asking people to identify opportunities for improvement and make changes to processes, you are asking them to take a risk. Unfortunately, in some organizations, risk-taking is simply not safe. The fear of failure will override any desire to try something new.

Organizations with a culture that is conducive to continuous improvement accept that some experiments with change will fail. They don't blame employees when this happens. Instead, they embrace the idea that it is good to "fail forward." Each attempt at improvement results in invaluable learning, if nothing else.

Ensure Commitment and Resources

The key objectives of quality improvement programs are reducing waste and becoming more efficient. Achieving this usually requires the commitment of time and sometimes budget in the short term. In organizations without strong executive support, these resources are lacking, and employees with the best intentions can quickly become frustrated.

Budgets are value statements. If improvement projects and the tools needed to support them aren't funded, that indicates that the work is not a high priority. That's not to say that all improvements are expensive; many don't require any spending at all. But providing the necessary support and funding for improvement is the best way to signal that CQI is a priority.

Practice Effective Measurement

People get excited about CQI when they see tangible proof of its impact. This excitement leads to more engagement and is the key to sustained improvement. That means that it is essential to measure how each improvement project impacts vital metrics in the short and long term. KaiNexus makes this much more manageable and helps keep everyone informed about how your team progresses toward their goals. People should be able to assess the impact of improvement in terms of reduced waste, increased productivity, reduced defects, improved customer satisfaction, and other critical indicators in your business.

If your quality improvement program has stalled out, it's not time to start the blame game. Instead, try looking into each of these areas to identify possible causes and solutions. When it comes to CQI, there are many moving parts, so don't give up. Dig in!

Chapter 4

MISTAKES: COMMON PROBLEMS TO AVOID WITH IMPLEMENTING CI SOFTWARE

Most of our customers have had a fantastic experience implementing quality improvement software. Their teams are excited, energized, and actively working on improvement projects across all categories. But once in a while, we hear from organizations that have a more significant struggle. We've identified some self-defeating mistakes that are common in these cases. The result is a "not-to-do" list.

Lacking Executive Support and Engagement

While at work, people generally do what they are asked to, but they are observant and recognize which initiatives have legs and which are just the special of the day. If you attempt to implement a platform for supporting quality improvement without strong executive support, employees are far more likely to check only the required boxes than to engage actively.

On the other hand, if it is clear that KaiNexus will be used for executive-level decision making, people are far more likely to get on board. Leaders should be involved in the rollout and should be personally involved in recognizing the people, departments, and teams contributing to positive change.

Rolling Out Software Without Context

KaiNexus is an essential part of your quality improvement work, but it's not the only element. It must be used in context with a culture of positive change. Successful software implementations happen when people understand the vision and mission of the organization and how it relates to their work. Every employee should feel both obligated and empowered to recognize and act on opportunities for improvement. Without that mindset, change is unlikely with or without software support.

Playing the Blame Game

We like to think of the implementation process as a quality improvement project. In the same way, you would look for root causes of a process failure; it pays to look for the real reason your quality improvement software rollout is not going well. For example, are there barriers to engagement? Are there competing priorities? The chances are that when you dig into the problem, you'll find that it is not something that can simply be blamed on employees.

Skimping on Training

KaiNexus is intuitive and easy to use. Your team probably won't need a ton of "click here, then submit" type training. But as we mentioned earlier, context is crucial, and people need training on how the solution will be used. Employees should have adequate instruction on connecting the dots between the software and any quality improvement techniques they use. For example, how does the solution support a PDSA cycle? What are the best practices for using KaiNexus during a rapid improvement event?

Ideally, employees would also have training and support for any personal configuration that makes the tool more relevant for their day-to-day work.

Failing to Recognize Desired Behaviors

For most employees, quality improvement is something that requires discretionary effort. It's something that is not strictly required by their job description. The best way to get people to go the extra mile in this regard is to consistently and publicly recognize the efforts of those who do.

Chapter 5

METRICS: HOW TO MEASURE CHANGE MANAGEMENT AND CALCULATE IMPACT

Ever wonder why factories, warehouses, grocery stores, and other similar businesses usually have a sign that says something like, "Accident-Free for 82 Days." The simple act of measuring and reporting that number makes it evident across all levels of the organization that this metric is essential. We measure what matters. No one wants to be the guy who sets the sign back to zero.

Measuring and reporting continuous improvement metrics sends a clear signal to the organization that this is important. When people know that you're tracking data around their improvement work, an increased sense of accountability drives engagement and activity.

But what should you measure and how?

KaiNexus unifies your improvement information into a single platform, giving momentum to your improvement efforts and streamlining the reporting processes. As a result, more people can participate, and you can accurately track your engagement, activity, and impact metrics.

Activity Metrics

Understanding what kind of improvement is happening and at what frequency is the first step in assessing your improvement culture's health. This information will show you how hard the organization is working toward positive change, who is actively involved in the effort, and where more training or coaching is needed.

Improvement Curve

Ideally, improvements should be completed at about the same rate as new opportunities come into KaiNexus. Projects that stall out after being identified bring down morale, decrease engagement, and reduce impact. You should be able to check the percentage of in-progress improvements at any time.

Status Reports

Visibility into the status of all improvements helps you assess how well work progresses from stage to stage. There are few overdue improvements in a healthy improvement culture because people prioritize getting this work done to enjoy the positive impact: the healthier your culture, the more significant the ROI.

User and Location Boards

Boards based on individual users, teams, and locations help you measure the activity throughout the organization with nuance so that you can coach better. See who is overloaded, who needs coaching to drive improvements through to completion, and who to recognize for great work.

Engagement Metrics

By tracking who is actively working on improvement projects over time, you can find averages, compare current results to those averages, and find out if there are any trends. You discover whether the ROI you've achieved is due to a small group of people, a sign of an undeveloped culture, or a large group indicating a vibrant culture.

User Engagement Summary

The engagement summary will tell you how many improvements people submit per year on average and the percentage of active people in your improvement management system. This gives you a view into how wide your improvement culture goes.

Location Engagement

Looking at engagement by location will help you identify leaders that are doing an excellent job of motivating teams. The best practices they rely on can be transferred to less active parts of the organization.

User Participation Rates

A small group of users making a significant impact might be an unsustainable anomaly. The idea participation rate report will show ROI being spread over many people and departments.

Impact Metrics

The impact of improvement on the bottom line is crucial. So, in addition to financial metrics, it's also imperative to track qualitative variables such as time savings, safety enhancements, health, and environmental impact.

KaiNexus allows you to connect improvement with impact in your reporting so that you can drill down into any number to verify accuracy. So if you see a cost reduction that looks impossibly high, for example, you can quickly see what improvements are contributing to that and validate that the reporting impact on each is correct.

Chapter 6

# SUPPORT: HOW KAINEXUS HELPS CUSTOMERS ACHIEVE SUCCESS

Our KaiNexus customers are most successful when they have a leadership model and a culture that encourages continuous improvement. KaiNexus has the expertise to help you and your organization improve at both strategic and tactical levels. We also have outstanding partners who can provide additional services and support.

KaiNexus Onboarding

The KaiNexus onboarding team uses web meetings and personalized group training sessions to ensure that your organization is ready to spread continuous improvement with KaiNexus.

A thriving culture of continuous improvement is based on three critical elements: leadership, methodology, and technology. We provide the technology component, but we're the first to say that no software solution is a "silver bullet." All three of these elements are equally crucial for continuous improvement to thrive.
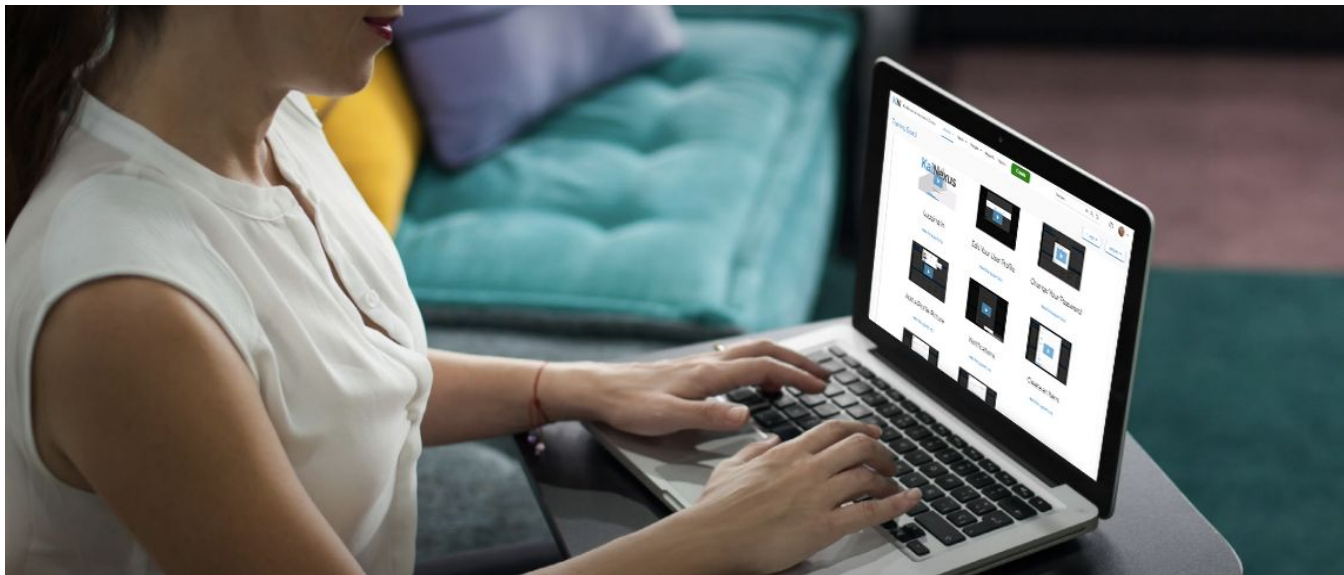
Our implementation process targets each of these three elements. In addition, our onboarding managers work with our customers to understand existing leadership behaviors and improvement methodologies and grow additional techniques to spread continuous improvement throughout the organization using KaiNexus effectively.

That's why our onboarding managers train leaders to utilize Kainexus to adopt behaviors that promote the spread of continuous improvement using a consistent, simple, and disciplined methodology. Our implementation incorporates software training with leadership development to spread continuous improvement throughout the organization using KaiNexus.

Optimization Reviews

Here at KaiNexus, we believe that our customer's success is our success, and we're on a mission to help spread continuous improvement. To help make sure customers are getting the most out of their investment at every opportunity, we recently launched Optimization Reviews. Optimization Reviews ensure customers are reaching their full potential with KaiNexus. The changes we make during this time will simplify every person's experience and will set customers up for success in the year to come.

What to Expect in an Optimization Review

Assess

- Review the current state of how customers are currently using KaiNexus and identify opportunities for how it can be better utilized to support their improvement culture.

Improve

- Learn what the most successful KaiNexus customers are doing and get insight into the benchmarks of their success. See what's possible, and identify how to get there.

Update

- KaiNexus is evolving and improving. We want to make sure customers are getting the most out of their investment by adopting new features and, simplifying at every opportunity.

Communication

- KaiNexus is more than software; it's a partnership on a path to improvement. This is customer's opportunity to share how our partnership is going, and tell us how we can better support them.

What are Key Results of an Optimization Review?

- **Recommendations** to help customers get the most out of their investment in KaiNexus by adopting the best practices of our most successful customers and fully utilizing all possible KaiNexus features.

- **Clarity** around customer's improvement program goals and the obstacles that need to be cleared in order to reach them.

- **Simplification** of the KaiNexus experience for everyone, including streamlining the user experience for frontline staff, middle managers, improvement coaches, and senior leaders.

- **Strategic A3** that is developed in collaboration between our team and our customers' based on organization's individual goals and objectives to guide our partnership.

About KaiNexus

KaiNexus is the ultimate cloud-based SaaS platform that supports continuous improvement. KaiNexus helps you execute and manage your improvement program throughout the entire improvement journey.

From daily improvement on the front lines to rapid improvement events, Lean projects, and strategy deployment, KaiNexus gives your people a single place and a standard method for capturing improvements. From there, it pushes each idea through to completion.

Features

- Top-Down & Bottom-Up Improvement
- Strategy Deployment
- Multiple User Types Available
- Visual Management
- Impact, Activity & Engagement Reports
- Intuitive Charts and Data Tracking
- Smart Notifications
- Email Submission
- Configurable Improvements & Projects
- Class & Certification Tracking
- Cross-Functional Team Collaboration

Support

- Dedicated Account Manager
- Onboarding Configuration & Support
- Email & Phone Customer Support
- Online Support Documentation
- Video Training

Technology

- Data Encryption
- SSL
- iOS and Android App
- iPad and Android Tablet Enabled

Organizations of all sizes in all industries in every stage of the improvement journey use KaiNexus. Their unifying commonality is that they recognize that continuous improvement is vital to the success of their organizations and that like with all other complex businesses processes, they need a platform from which to manage it. They work to engage their entire organization in improvement and value the ideas and opinions of their front-line workers. Our customers strive to develop the methodologies and leadership behaviors critical to developing an improvement culture and understand that they need a software to support those elements.

If this sounds like you, KaiNexus would be a good fit for your organization. Contact us to learn more.