



Visual Management

How to transform data into continuous improvement.

KaiNexus

Introduction

The human brain processes visual information 60,000 times faster than text. Visuals are also more powerful than what we hear. When people hear information, they're likely to remember only 10% of that information three days later. However, if a relevant image is paired with that same information, people retained 65% of the information three days later. If you think about how you move through the world, you won't be surprised that 90% of all the information that goes to your brain is visual, and 93% of all human communication is visual.



Organizations dedicated to continuous improvement can take advantage of this reality and use visual management to engage staff, provide insight into essential information, and help ensure that improvement projects are moving forward as planned. With today's technology, it is possible to introduce an improvement management system that makes visualization easy and accessible for every employee.

This ebook will address the benefits of visual management, its practical application in business, and the technology that brings it to life.

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Chapter 1

How Visual Management Spreads Improvement

Visualization helps managers and team members feel closer to improvement work. It is one thing to read about work being done to improve the organization; it is quite another to see forward progress.



Why do organizations that leverage visual management tools complete more improvement projects, involve more people, and get more impact? Visualization increases engagement. Here's how.

People Stay Connected

These days, many teams are distributed across multiple locations. Remote work is becoming more common, and folks do a lot of work outside of traditional business hours. A digital platform for visualizing improvement projects and results ensures that people stay connected to the work and each other no matter what time it is or where they happen to be. Whenever someone needs information about the state of a project or process, it's available on any device.

Visualization Increases Engagement

Marketers know this. Website pages with images and video get 95% more views than their counterparts with only text. People like engaging with images; if your improvement platform is visual, they will interact with it more often. When employees can instantly understand the impact that improvement work has on the organization, they become highly motivated to invest effort and be emotionally attached to success.



Leaders Become Enablers

One of the most effective ways to spread improvement is for leaders to help remove roadblocks and marshal resources for improvement efforts proactively. Visual management makes it possible for leaders at every level to recognize stalled progress and act quickly to help. Not only are there practical benefits to this type of leadership, but it also helps underscore the importance of improvement within the company's culture.

Meetings Are More Effective

A digital visual management platform changes the focus of meetings from updates and explanations to an opportunity for strategic planning and problem-solving. The areas that need focus are immediately apparent to everyone involved so that you can get right to the most important topics. Huddle boards are a popular way to organize meetings. With a virtual system, you get all of the advantages of a huddle board and involve people who are not in the room.



Constancy Increases Collaboration

When the same visualization tools are used across the organization, you create a common way of addressing problems, accessing processes, and documenting results. This shared experience for all employees makes it easier to collaborate across department or team boundaries. That's essential because those touchpoints between groups are often where the biggest opportunities for improvement can be found.

Problems Become Apparent

In a culture of continuous improvement, problems are never ignored or swept under the rug. We want problems to be highly visible so that they can be addressed quickly and at the source. Control charts are a great example of this. It is difficult to ignore an out of control process when it right in front of your face.

Success Builds on Itself

Perhaps the most effective way to expand improvement culture and activities within an organization is to have some big wins. For all of the reasons above, you are more likely to implement successful changes if you leverage visualization. That success will, in turn, lead to more success. Improvement culture really is the gift that keeps on giving.



Chapter 2

Everyday Examples of Visual Management

When we write about visual management, we are usually talking about sophisticated quality management tools like Kanban, huddle boards, and the dashboards available in the KaiNexus application.

These are all incredibly valuable visual management applications in the workplace, but visual management is actually all around you. Understanding these everyday examples of visualization may help you apply the same principles more thoughtfully at work.



Share Information

This is the most basic application of visual management. Think of an Open/Closed sign on a business. You know right away whether to come on in. A simple bulletin board with tacked up notices is another example. Perhaps the most widely used approach is color-coding. Everyone knows that green means go, yellow means use caution, and red means stop. Because the meaning of these colors is so widely understood, they are used well beyond traffic lights. We've seen dozens of spreadsheets with on track projects, happy clients, and approved projects all in green. It works because it's like a language that everyone can understand immediately.



Communicate Standards

There's an exercise used by many Lean teachers in which participants are given precise instructions on how to draw a pig. Everyone has the exact same instructions, so the pigs should all look alike, right? Nope. Even given detailed text descriptions, people interpret the steps differently, and no standard is achieved. You'll get far more consistent results by showing people what the final pig looks like. Images can be used in all sorts of ways to make sure that everyone understands what it looks like when the standard is achieved, whether the standard is related to a product, an organized workspace, a properly completed form, or almost anything else.

Enforce Standards

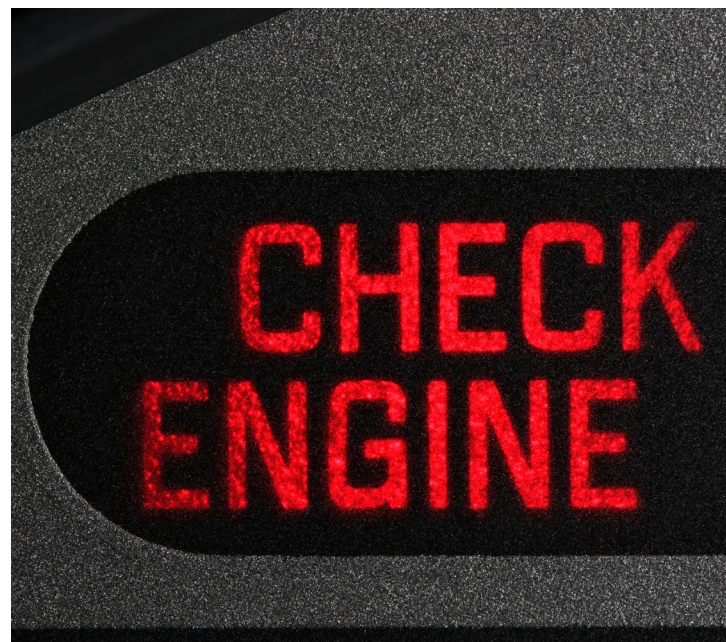
Sometimes visual management can be used to make it more difficult to ignore the standard than to comply. Templates for Word and PowerPoint documents are examples of this type of visual management. We notice this a lot in databases. For example, you might have a drop-down select field for “State,” rather than a text field so that you don’t end up with hundreds of states because Texas, Tx, and TX are all represented.

Bring Attention to Irregularities

This is one you probably see a lot. Your phone flashes at you when the battery is low. There’s a light on your dashboard when your car is running too hot. Your fridge probably has a light that lets you know when the water filter needs to be replaced. There are non-electronic examples as well. If you have a pegboard in your garage with a hook for every tool and an outline of that tool’s shape drawn on the board, you know right away when someone didn’t put your hammer away.

React to Irregularities

Of course, we believe that when irregularities occur, the right course of action is to figure out the root cause and solve the problem, but sometimes a, “Caution, Wet Floor,” sign really comes in handy. Detour signs for road work, monitors for patient vital signs, and the buttons that have replaced andon cords on many factory floors are all examples.



Chapter 3

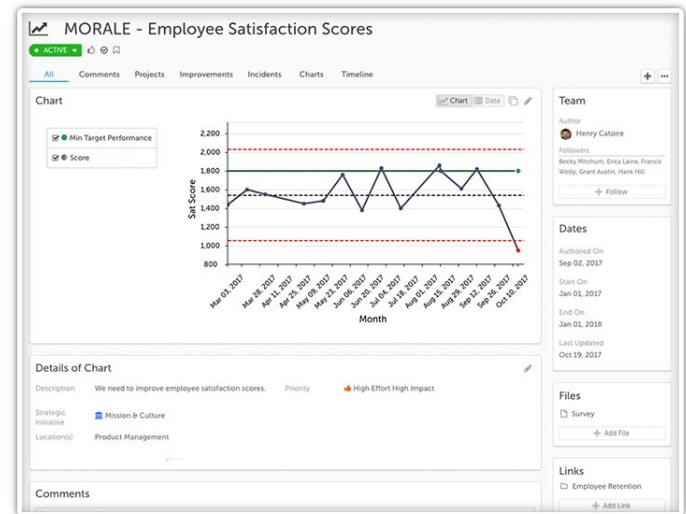
Lean Visual Tools

The Lean business leverages several powerful tools for management and improvement. You don't have to be all in on Lean to take advantage of them. Any organization striving for continuous improvement can benefit.



Process Control Charts

Process control charts (sometimes called “process behavior charts”) are graphs that plot out process data or management data (outputs) in a time-ordered sequence. They typically include a center line, a 3-sigma upper control limit, and a 3-sigma lower control limit. There might be 1- or 2-sigma limits drawn in, as well. The center line represents the process mean or average (and sometimes the median).



Organizations that practice continuous quality improvement use control charts to provide a common language for talking about process performance and behavior, make informed decisions about which processes to leave alone and which to target for improvement, limit the need for inspection and determine process capacity based on past performance and trends. They also create the baseline for future improvements.

Kanban

Kanban is a Lean visualization technique designed to manage and improve workflow. This approach uses visual cues to balance demand with available capacity and remove system-level bottlenecks. Work items are represented visually to give participants a view of progress and process, from start to finish - usually via a Kanban board. Work is pulled through the process as capacity permits, rather than work being pushed into the process when requested.

If a workflow is visualized and work in progress is limited, any interruption in flow can be identified, targeted, and resolved before a backlog forms or grows too large. This is important in any industry, as backlogs tie up investment, create prioritization conflicts, and increase the distance to customer value.

Huddle Boards

Huddle boards serve the important purpose of visualizing the progress of improvement projects. At specified intervals, teams gather to discuss positive change opportunities and work together to remove any impediments to improvement. Huddle boards visualize work, promote team collaboration, and place a focus on improvement.

Gemba Walks

Gemba walks are a favorite Lean visual management technique, but they can be used by any leader to become more connected with the people and process they manage. During a Gemba walk, the manager visits the place where work is done to observe, show respect to the employees, and potentially identify opportunities for improvement.

By visiting the place where work is done (Gemba means “the real place,” in Japanese), leaders gain valuable insight into the flow of value through the organization and often uncover opportunities for improvement and learn new ways to support employees. The approach is a collaborative one, with employees providing details about what is done and why.



5S

5S is a workplace organization method that uses a list of five Japanese words which have been translated into English as "Sort", "Set In order", "Shine", "Standardize" and "Sustain". The five words that start with S describe how to organize a workspace for efficiency and effectiveness by identifying and storing the items used, maintaining the area and objects, and sustaining the new order. 5S is also known as "visual control, visual workplace, or visual factory."

It is not just about housekeeping, but concentrating on reducing waste, based on maintaining the standards and the discipline required to manage the organization - all achieved by upholding and showing respect for the workplace. When a workplace is well ordered, it becomes easy to recognize when something is missing or out of place.



A3 Problem Solving

Toyota first used the A3 problem-solving methodology in the 1960s and it was later embraced by proponents of Total Quality Management, Six Sigma, Lean, and other systematic approaches to continuous improvement. "A3" references a European paper size about the same size as an American 11-inch by 17-inch tabloid-sized paper. Using the A3 method, teams create a one-page improvement project report. By limiting the report to one page, teams are forced to be concise and thoughtful about including only relevant information. This makes the report easy to digest.

Chapter 4

The Essential Features of Visual Management Software

If you want to get more improvement projects completed and gain better insight into how your team is working to cause positive change, visual management software is the way to go.

As with any category of technology, not all solutions are the same. We recommend looking for a visual management platform that will support your needs today and in the future. Making the right choice, in the beginning, is critical. Here are some of the features you can expect from the best solutions.



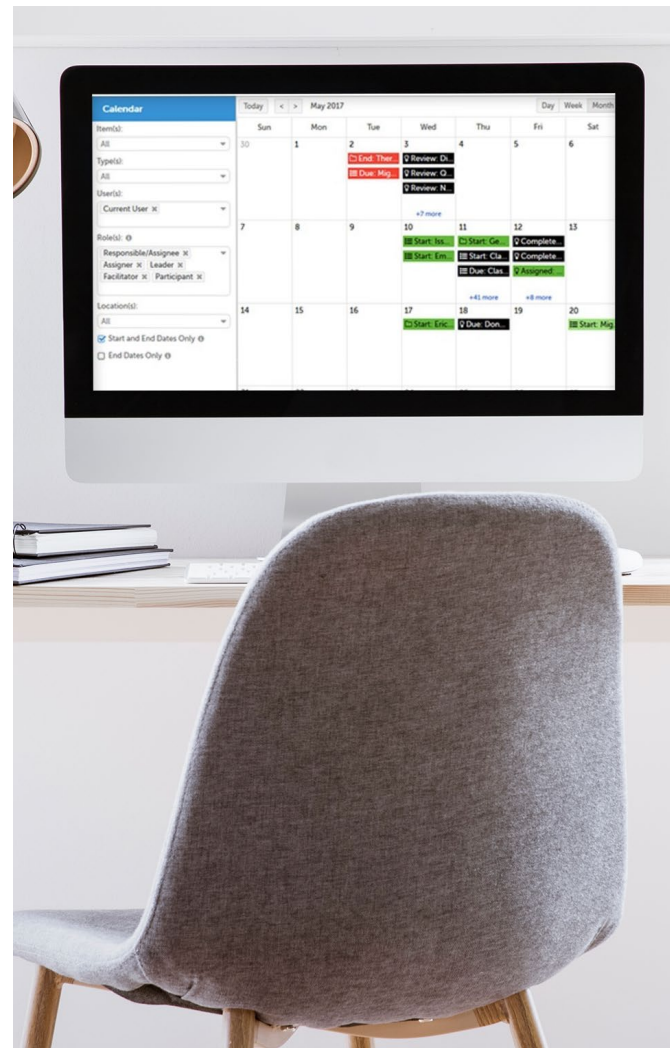
Task Load and Activity Level View

Organizations that ho get the most out of visual project management are those that believe that improvement is everyone's job, that ideas for improvement can come from every employee, and that engagement in improvement is part of how individual success is measured. Therefore, it is important that your project management platform has an easy way to visualize each employee's task load and activity level. That way, managers can make sure that the load is spread smartly across all team members and that everyone is contributing.

Calendar View

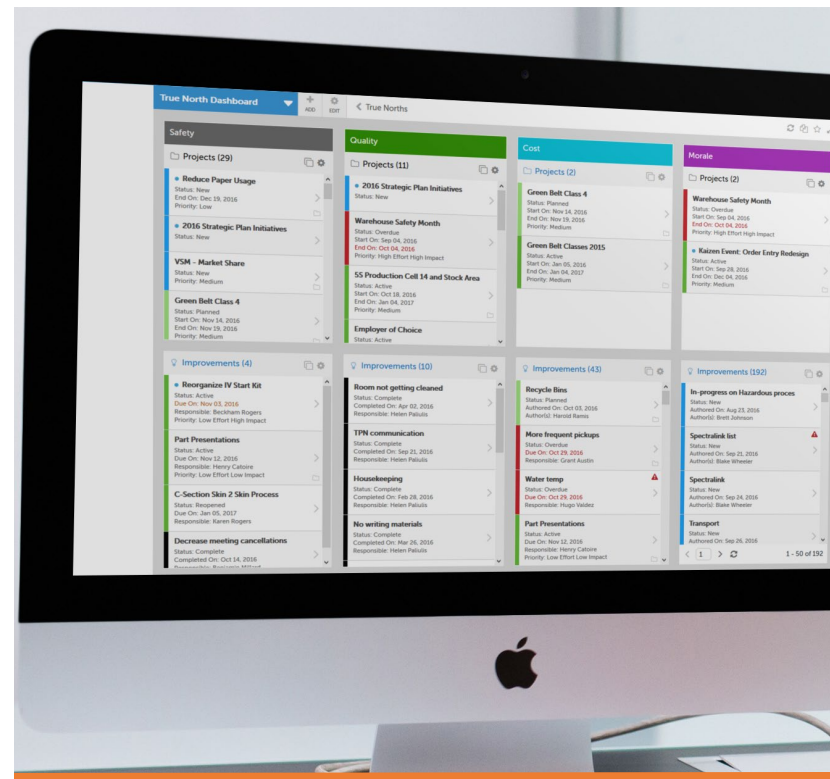
This is a simple yet essential requirement. Users should be able to see upcoming tasks and meetings in calendar form so that conflicts can be avoided, and due dates aren't missed. Ideally, users can alter the calendar display to show: dates associated with an improvement that the employee has submitted, including review and completion dates, scheduled projects, and assigned tasks.

Users should be able to adjust the view to include items by the day, week, or month and they should be able to click on any item to drill down and get more detail.



Kanban View

A Kanban board is a visualization tool that helps people understand the flow of their improvement work. Visual project management software with a Kanban View lets you quickly check on your work's progress. The Kanban View breaks down a list of items by status - each column contains all the relevant items of a particular status. For example, columns might be titled, "Planned," "In Progress," "Overdue," and "Complete."



Team Dashboards

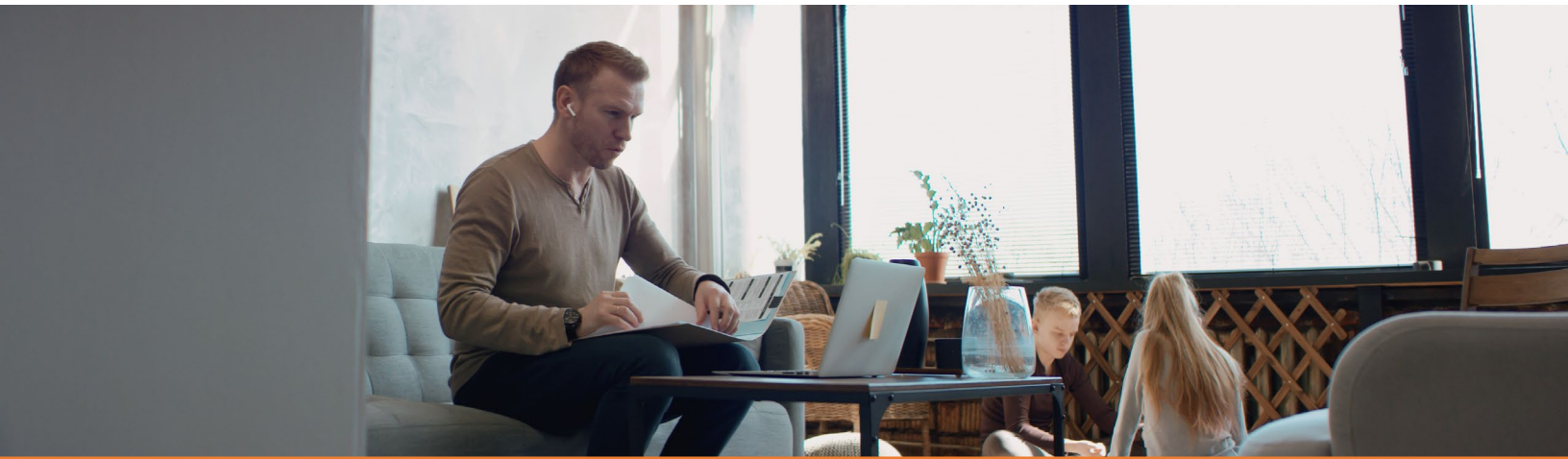
Improvement is a team sport, so your visual project management solution should have configurable dashboards that display tasks and activities related to any given "team."

A team may consist of people in the same functional area that regularly work together and are managed by the same person, or it may be made up of a cross-functional group working on a particular project or group of initiatives. Either way, each member should have a simple way to keep track of each element's progress.

Configurable Views and Boards

People won't adopt any software tool that doesn't provide value to them. That's why the solution must be configurable so that each person gets the information in a format that makes sense for their role and responsibilities. Everyone should have access to the information they need, no matter what time it is or where they are located.

It is an excellent idea to choose a solution that has apps for Android and iOS, so it is always available on whatever device your team members prefer.



Chapter 5

7 Signs Your Organization Needs Visual Management

Leaders have a lot to juggle when making decisions about what investments are most important for the organization. They must consider the need of all stakeholders, and there are often competing priorities. We talk to leaders all the time who think that their organization might benefit from visual management software but aren't quite certain if the time is right to make the investment.

Here are some signs that indicate it's time to act.

Progress Toward Strategic Objectives is Slow or Non-existent

Hopefully, your organization has been through a strategy deployment exercise like Hoshin Kanri to determine your most essential goals in the next three to five years. If you find that progress is not being made, it probably isn't because your team isn't working hard; it's far more likely that they just aren't working on the right things.

Visual management, especially when done digitally, gives leaders insight into which projects are in progress across the entire organization. They can make sure that the work being done aligns with the strategy and that the most important items are given top priority.



Improvement Projects are Complex

To-do lists are sufficient for simple jobs, but if you have improvement projects that consist of multiple processes, more than one team, and an array of individual items to complete, a simple list won't suffice. The beauty of visual task management is that it makes it easy to digest complex information. It only takes one second, for example, for an employee to understand how their efforts fit into a larger whole. Task prerequisites and dependencies are easy to identify, and milestones stand out.

Work in Progress is Often Stalled

If you have many projects that get off the ground, but never make it to the finish line, visual task management is probably right for you. It helps to identify where the roadblocks are happening and potentially even find challenges that are hampering more than one project.

Capacity for Work is Not Well Understood

Ideally, every part of the organization will be working at capacity, but not overburdened. This is almost impossible to achieve if the state of work in each function is not documented visually for everyone to see. Instead of pushing work blindly into team members' queues, tasks can be assigned with a better understanding of capacity. This not only reduces the likelihood of process blockages, it also improves collaboration and communication.

The Organization is Distributed

If your team works from multiple locations or includes remote workers, digital visual task management is even more essential. Distributed teams can be successful, but the distance creates challenges, no matter how dedicated and capable the team members. An online management tool, such as a Kanban Board, helps everyone feel connected to the work.



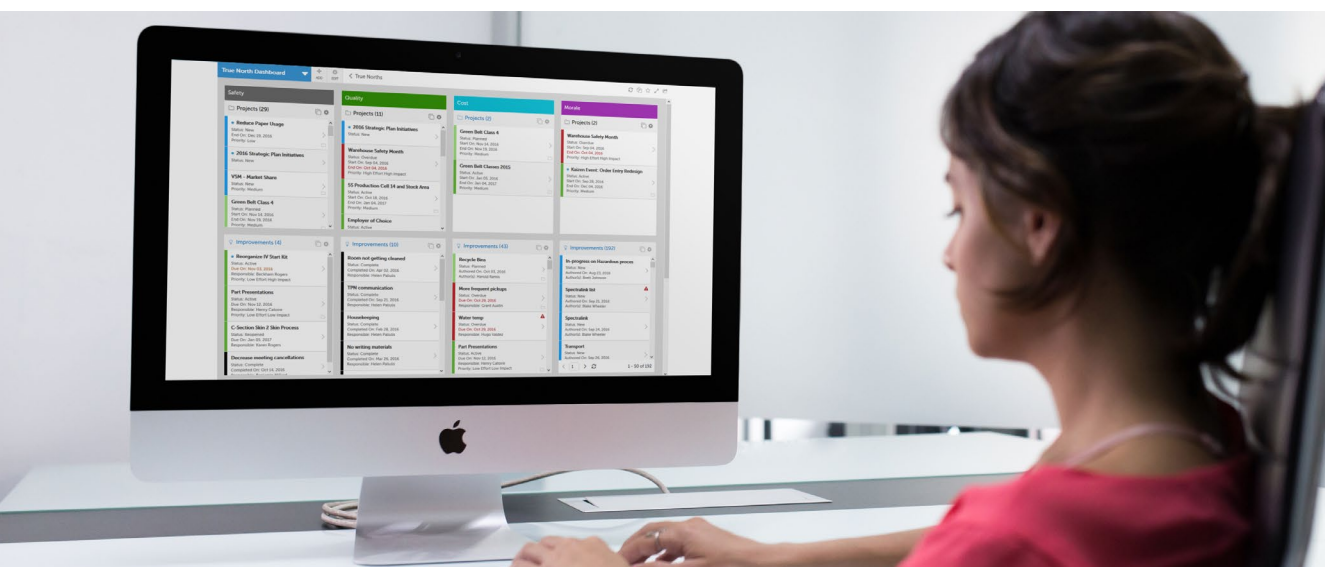
Meetings are Inefficient

If meetings have become more about updates and “bringing everyone up to speed” than solving problems and discussing ideas for improvement, visual task management can help. With a single version of the current state of work, there’s no need for endless review and repetition. Everyone knows what’s happening because it’s on the board. Start your meetings with meaningful discussion, not a recap.

It Takes a Long Time for New Employees to Become Effective

Navigating a new organization is a challenge even for the brightest new-hires. Our clients have found that introducing visual task management makes bringing new folks up to speed more efficiently. That’s because it makes it easy to understand how they fit into the bigger picture. It helps explain what everyone is working on and why, and it gives managers an effective tool for recognizing the contributions of new players on the team.

If these challenges sound familiar, it is time to give visual management software serious consideration.



Chapter 6

8 Benefits of Digital Huddle Boards

Huddle boards are an effective visual management technique frequently used in conjunction with a daily huddle or stand up meetings. Everyone gathers around the board to chat about the top priorities for the day. Daily incremental improvement plans are discussed and evaluated.

The idea has a ton of merit, but a physical board hanging on the wall has some severe limitations. That's why there is a move away from physical boards to software-based management. Cloud-based technology makes it easy and cost-effective for organizations of all types to enjoy the advantages of digitizing their huddle boards. Here are a few big ones.



Digital Huddle Boards are Perfect for Remote Workers

Keeping remote workers engaged in improvement has suddenly become a top priority as millions of Americans are under Stay at Home orders. Physical huddle boards are useless if everyone is working from home.

Digital huddle boards, on the other hand, are useful regardless of who is working from where. You can have your daily huddle meeting via video chat or conference call, and everyone can have access to the same information. Collaboration is no longer tied to proximity.

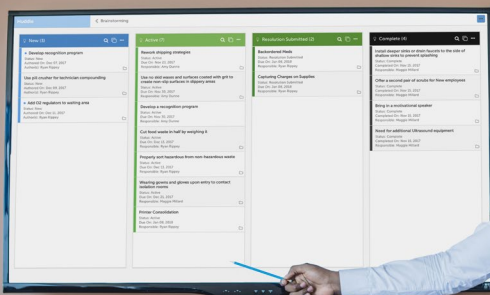
Leaders Can Interact with Multiple Boards

For people who manage more than one team, digital huddle boards are a gift. Because the boards are online, leaders can check on every team's engagement and activity without going from place to place. Role-based access means that everyone has the information they need all in one unified platform.

The History of Improvement Work is Captured

With a physical board hanging on the wall, you get a snapshot of what is happening right now. That's great, but the history of past improvement work is not available. When you move your board into the cloud, you begin to create a repository of knowledge.

All of the documents, conversations, and other information about each project are collected and available for future review. In this way, your team gets smarter with each improvement.



Cross-functional Collaboration is Easier

Huddle boards are usually used and managed by functional areas, but often improvement work requires the efforts of people from more than one department. Digital huddle boards make working across functional boundaries much more efficient. They also help the improvement mindset and culture spread by making information about successful projects available to everyone in the organization.



Success Can Be Broadcast

Organizations that get the most from a culture of improvement share success far and wide. One of the best ways to get more engagement from team members is to recognize and appreciate those that contribute to positive change. Digital huddle board solutions have improvement broadcasting capabilities that make recognition easy and a natural part of each improvement cycle.

Goals and Strategy are Aligned

Improvement work should not happen in a vacuum. It should be tied to the overall strategic goals and objectives of the organization. It is often said that everyone should be working toward “True North.” Digital huddle boards can be used to achieve this tight alignment by cascading goals down from the corporate level to each individual person.

Notifications and Alerts Accelerate Improvement

Physical huddle boards have many of the same disadvantages as spreadsheets when it comes to improvement work. They are passive holders of information, but neither does anything to spur engagement actively. Digital huddle boards are different. The best ones include workflow features that alert people with email notifications when action is required. Managers know when deadlines are missed, or new opportunities for improvement have been submitted. Your team has a lot going on, so these little reminders can make all of the difference.

Impact is Calculated

Many improvements create an immediate short-term impact that is apparent to everyone involved. However, some develop gains over the long term. Physical huddle boards aren't designed to capture the effect of improvement, but software can do exactly that. The ability to calculate the impact of improvement is crucial when it comes to securing the resources to do even more of it.

Of course, not all digital huddle boards are the same. When looking for a solution, be sure that it can deliver on all of these benefits. If you do, you'll see better results and more engagement in no time.



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.



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.

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