



IMPLEMENTING & PLANNING VISUAL MANAGEMENT & PERFORMANCE HUDDLES

A 9 STEP GUIDE IN 3 PHASES

1-3 DISCOVER. 4-5 DESIGN. 6-9 DEPLOY.

1 ESTABLISH THE MEASURES THAT MATTER

WHAT?

REVIEW YOUR CURRENT PERFORMANCE MEASURES/KPI'S

Are they the right ones?
Do they encourage the right actions or behaviours?
Do the current measures align with your strategy or vision?

WHO?



TEAM LEADER AND DEPARTMENT HEAD

REVIEW HOW DATA IS CURRENTLY COLLECTED

Is it efficient and accurate?

REVIEW HOW DATA IS ANALYSED

Is it being used? Does it give the right indicators?
Can you spot abnormalities?
Are control charts appropriate?

2 ALIGN SIMPLIFY IMPROVE

LINK TO STRATEGY

Ensure the things you are measuring link to your organisational strategy

If there is no link be **BOLD** and question whether you need them!

MEASURING

Focus on the few that matter. Measuring everything is ineffective!

MAKE IT STAND OUT!

Use charts and coloured indicators
Ensure you can easily spot abnormalities

DATA COLLECTION

Improve the way data is collected and analysed

6 HOLD A DRY RUN

CLARIFY

Roles and behaviours

TEST

The process

7 PILOT THE HUDDLE

8 REVIEW AND REFINE DATA & PROCESS X 8

9 LOCK IN THE DESIGN

Now print or develop final versions

5 CREATE THE 'DRAFT' PERFORMANCE BOARDS

USE PAPER

DON'T get your board professionally printed right away

VISIBLE

Chose a visible, practical space, DON'T hide them in a meeting room

GEMBA

Put your boards where the work is done

WRITE

The draft process as a flowchart

CREATE

The draft boards

AGREE

The pilot process

4 DESIGN THE HUDDLE PROCESS & HUB WITH THE WHOLE TEAM

3 ENGAGE THE WHOLE TEAM

INTRODUCE

Visual Management

AGREE

The process to measure

ESTABLISH

The benefits

AGREE

The data collection methods

CONSIDER

Visual management e-Learning

VM BOARD TIPS

Use charts and graphs rather than numbers, where possible

Make sure all the people you are briefing understand the interpretation of any charts you are using

Remember that data that can be updated by the local team is more valuable than data supplied remotely

Clearly identify what action or escalation is expected when any deviation from standard is found

Keep all data current

Clearly identify the owner of the data and update requirements

Keep reports to a single sheet

Enable decision-making at the lowest practical level.

