

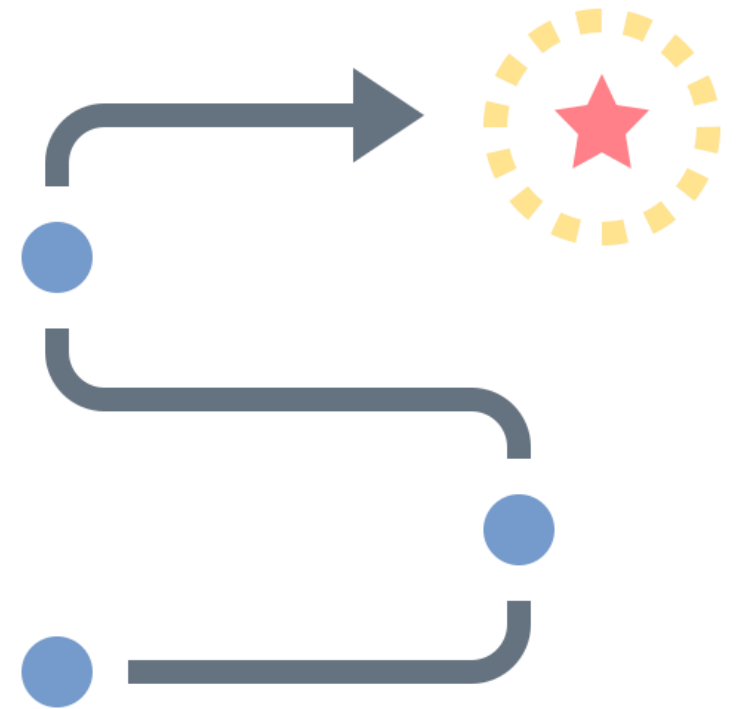
DEMYSTIFYING VISUAL MANAGEMENT

08 26 2021

Heidi Loveall, Strategy & Performance Consultant

AGENDA

- Visual management introduction
- Types and examples
- Tips for addressing common problems
- Tool



POLL

When it comes to visual management, I would say:

- I'm here to learn what it is.
- I know about it but don't have experience using it.
- I have a little bit of experience using it.
- I have a lot of experience using it.

VISUAL MANAGEMENT INTRODUCTION

Principle

- Make information visible to make the work more effective

Benefits

- We can absorb information more quickly when it's visual
- Everyone can see the same information
- It's easier to see waste and problems more quickly

VISUAL MANAGEMENT TYPES & EXAMPLES

VISUAL MANAGEMENT TYPES

- Visual tools at a process step
- Visual management of the work
- Visual management of the process flow
- Visual management of performance

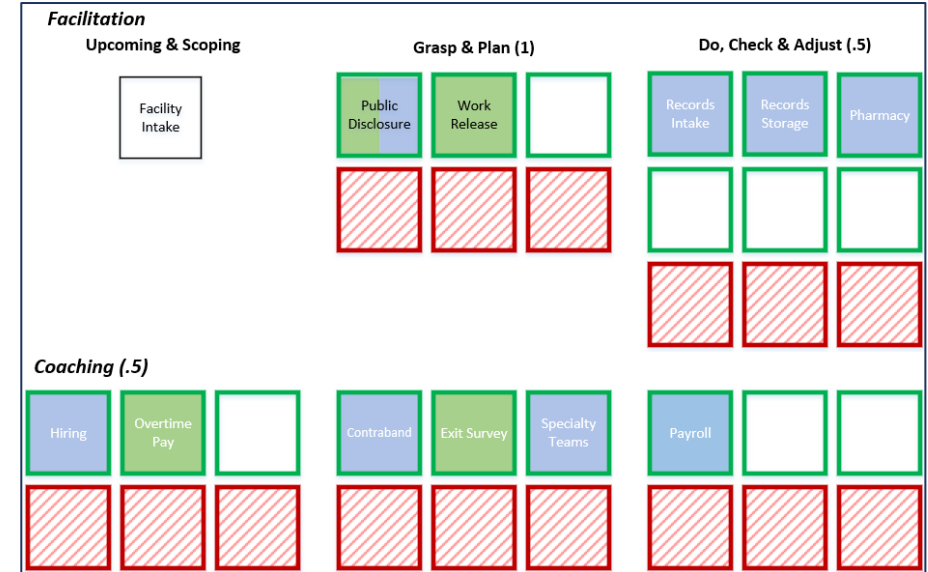
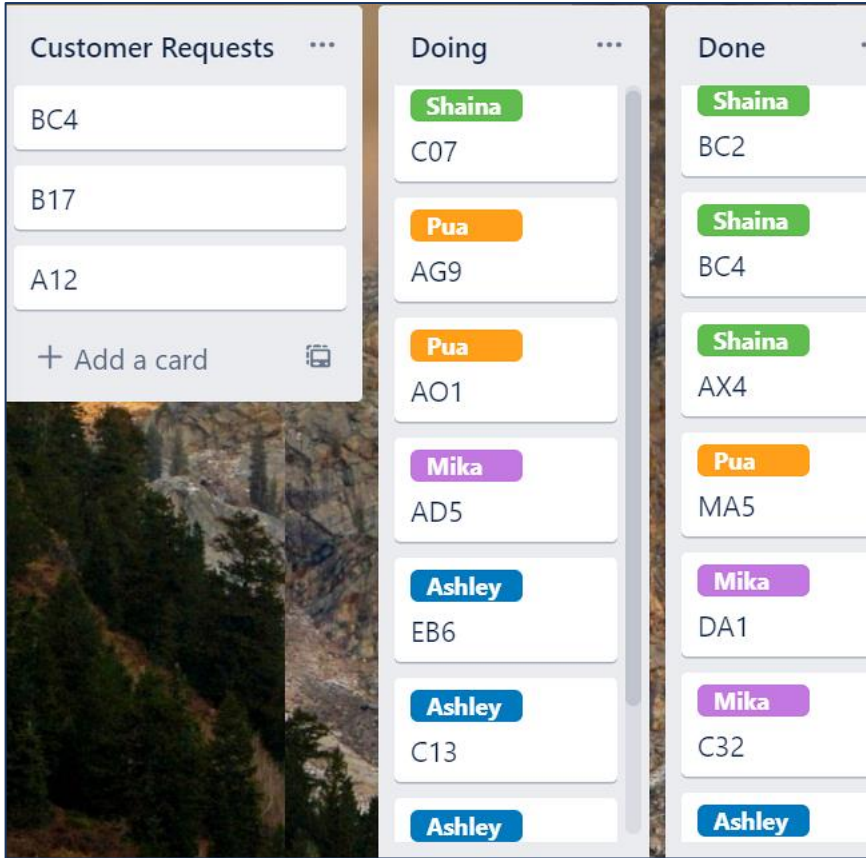
VISUAL TOOLS AT A PROCESS STEP



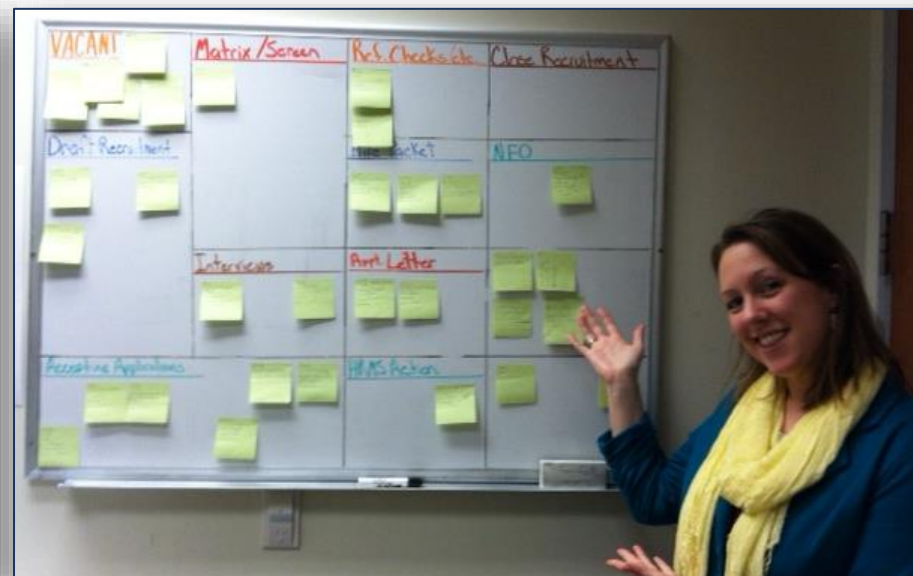
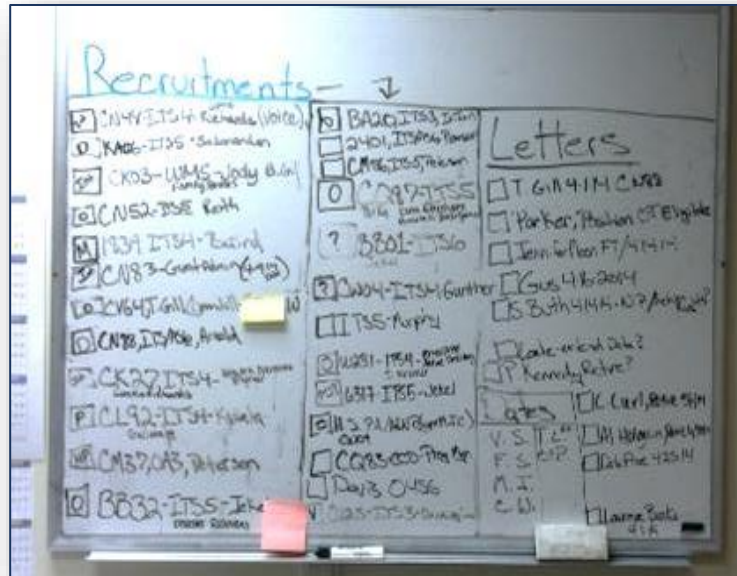
- Pink - waiting for review
- Green - Already reviewed



VISUAL MANAGEMENT OF THE WORK




VISUAL MANAGEMENT OF THE PROCESS FLOW



LEAN ADVISORS MEETING			
Date:	WHO:		
ACTION:	TO DO:	DOING:	DONE
Decide Meeting Focus			X
RELATE/CONFIRM MEETING LOCATION DATE TIME			X
SEND OUTLOOK INVITE			X
CREATE AGENDA/PRE-SENTS			X
SEND AGENDA/PRE-SENTS			X
PREP CONTENT/ROLES			X
PREP MATERIALS/Handout/Signs			X
CONDUCT MEETING			X
DEBRIEF MEETING	X		
Submit Weekly Update	X		
On call Preparation	X		
Review Process	X		

VISUAL MANAGEMENT OF THE PROCESS FLOW, CONT


Instructions/Recommended Board Improvements



PPD Project Status Board Instructions

This card is a template.

1



Recommended Board Improvements - ADD CARDS BELOW

This card is a template.

Pending Project/Project Initiation

XX-XXX Project Name - TEMPLATE

0/126

Planning Project

GW Bush Monument Installation

12/20

HK

XX-XXX, Perry St Child Care, Playground Cover (Minor)

1/54


TY

Consultant Services ONLY

Tenant Improvement Project

XX-XXX, OB2 Drinking Fountains

4/113




Consultant Services ONLY

Operating Project

XX-XXX, OB2 Sewer Pump

3/113



Public Works Request Status

Design-Bid-Build

22-098 SOS= WA Talking Book & Braille Library- Window Replacement

5/74

SH

Design-Bid-Build

2022-103 DCYF Green Hill School Baker North Design & Remodel

4/82

SH

Design-Bid-Build **LCM Project**

General Contractor/Construction...

Capital Project

2022-158 LCM Modular Buildings

4/111


SH

Consultant Services ONLY

Operating Project

22-112 WDFW NRB-Air Compressor Piping

1/11



Consultant Selection Status

Design-Bid-Build **Capital Project**

22-105 DES Campus Security- Wedge Barrier

5/122

MJ

Design-Bid-Build **Capital Project**

22-155 Capitol Campus Door Access Control Exterior Improvements (Major/Minor)


3/76

TY

Design-Bid-Build **Capital Project**

2022-152 Executive Residence - Video Surveillance and Lighting (Major)


8/66



Design-Bid-Build **Capital Project**

2022-160 Exec Residence- Fencing, Gates, and Bollards (Major)

8/66



Predesign/Special Study Status

LCM Project

Consultant Services ONLY

Capital

☒ **Public Works Request**

18-527, 100%

☒ Public Works Request (PWR) for Preliminary Project Scope, Schedule and Total Project Costs submitted to Contracts

☒ PWR Assigned by PPD Program Manager

☒ Project Management Plan (PMP) complete and reviewed by PPD Program Manager

Add an item

B&G W

Consult

Capital

☒ **Consultant Selection**

20-264, 63%

Installat

☒ Preliminary Scope of Services and Design Schedule developed by PPD-PM

☒ Request for Qualifications (RFQ) issued

☒ Review of Consultant Statement of Qualifications (SOQs) complete

☒ Consultant Selection Interviews complete, if applicable

☒ Selection of Most Highly Qualified Consultant complete

☐ Review of Consultant Proposal- Negotiated Scope of Services, Fee Estimate, and Deliverable Schedule- completed by PPD PM and Contracts

☐ Consultant Agreement signed by PPD Program Manager

☐ Notification to Proceed Letter issued to Most Highly Qualified Consultant

Design Status

Consultant S

Operating Pr

Hide checked items

VISUAL MANAGEMENT OF PERFORMANCE



10 Calls on Hold	20 Agents on Calls
1:40 Longest Call Waiting	10 Abandons this hour

In	Out	# of Days
11/1	11/2	1
11/1	11/5	4
11/2	11/4	2
11/3	11/5	2
11/3		
11/3		



HEIDI'S HELPFUL HINTS

POLL

Which of these problems have you run into? (check all that apply)

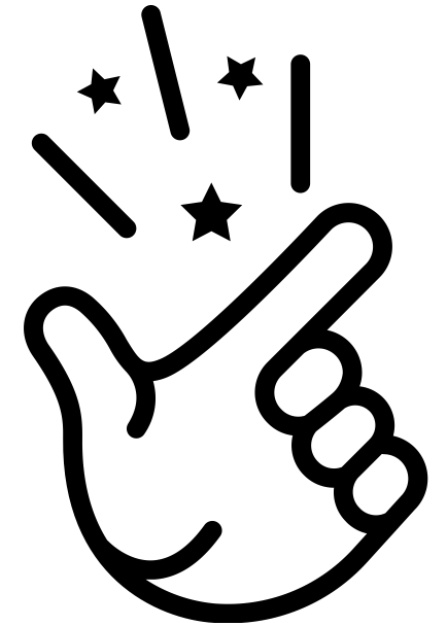
- Feeling overwhelmed getting started
- People not using the visual management system
- Visual management information getting outdated
- Never talking about the information
- Getting discouraged and giving up

MAKING IT WORK

1. It has to be easy, or you won't sustain it.

Common Problems

- Even more work?
- Frozen in time



MAKING IT WORK

2. Embrace the messy but effective.

Common Problems

- Blank board overwhelm
- Ordering your own barriers
- Can't touch this



MAKING IT WORK

3. Location matters.

Common Problems

- Hidden figures
- A step too far

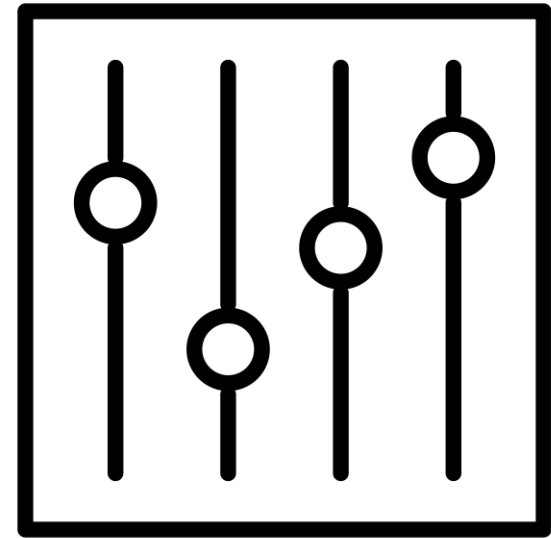


MAKING IT WORK

4. Customize the system so it makes sense for your work.

Common Problems

- Copy and paste waste
- If it's good enough for them...



MAKING IT WORK

5. It takes courage and a commitment to blame free communication.

Common Problems

- Problems are problems
- People are problems



MAKING IT WORK

6. The value is in seeing problems and doing something about them.

Common Problems

- Immortalized data
- Putting on a show

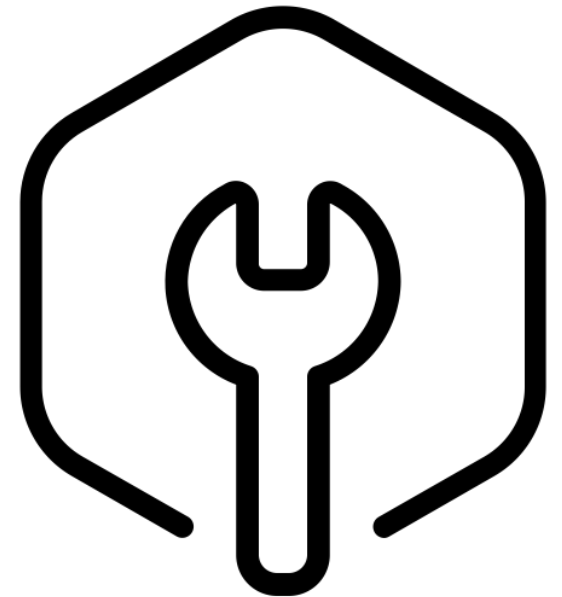


MAKING IT WORK

7. Adjust; don't abandon.

Common Problems

- Same problem, different day
- We tried that once



CASE STUDIES

LOCKED OR NOT?



TRAINING TRACKER

- Basics
- Progress
- Goals
- Check in

Annual In Service Training Completion		Brian	Bryan	Dan	Heidi	Michelle	Rhonda	Tami	Tracy
Classroom	Emergency Mgmt	✓	✓	✓	✓	✓	✓	✓	✓
	Suicide Prevention		✓	✓	✓	✓		✓	✓ see 4/12
Yearly	Fire Extinguisher	✓		✓	✓		✓		✓
	Infectious Disease	✓		✓	✓		✓		✓
	IT Security	✓		✓	✓		✓		✓
	PREA	✓		✓	✓		✓		✓
	Outdoor Heat Exposure	✓		✓	✓		✓		✓
	Trips & Falls	✓		✓	✓		✓		✓
Every 3 Years	Confidentiality	✓		✓	✓		✓		✓
	Ethics	✓		✓	✓		✓		✓
	Public Disclosure	✓		✓	✓		✓		✓

WRAP UP

TOOL TIME

Check the conference website for a checklist you can use to help you develop and evaluate visual management.

Visual Management Checklist

Getting Started

Use the questions below to help you think through developing meaningful visual management.

- What needs to be seen? What should the visual management show?
- What is the best way to display the information?
- Who will use it? Who will update it?
- How often will it be used? When will we talk about it?
- What action will it trigger?

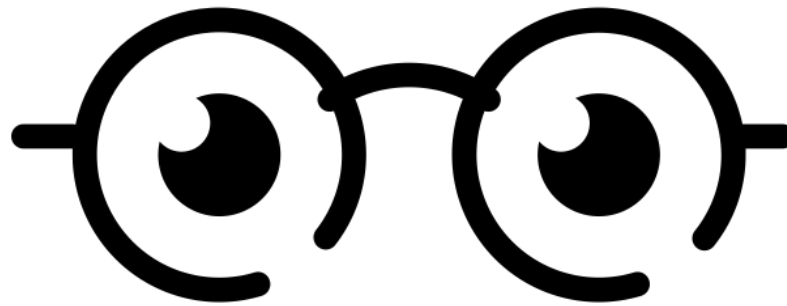
Checking Your Work

Use the questions below to evaluate whether you have put in place all of the elements needed to make your visual management successful.

- ☐ Have you picked the right location? Will the right people see it at the right time?
- ☐ Is it irresistibly easy to update? Are there any barriers to keeping the information fresh?
- ☐ Is the visual effective? Can you read and understand it in 15 seconds from 15 feet away?
- ☐ Does it make sense for your work? Have you customized it to be specific and relevant to what you and your team do?
- ☐ Are you watching for equity and inclusion issues? Is the information accessible to as many people as possible?
- ☐ Are you making sure people aren't getting blamed for process issues? Are you rewarding courage and openness in discussing the real situation?
- ☐ Are you actually using the data to make things better? What do you do when a status indicator turns red? *(Hint: if the answer is "nothing" or "it never turns red," you're probably not looking at the right thing.)*
- ☐ Are you fine-tuning your visual to work better for you and your team? What is your check and adjust cycle?

POINT TO PONDER

- What in your workplace right now would benefit from being more visual?
- What will you try first?



QUESTIONS



THANK YOU

heidi.loveall@des.wa.gov