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Introduction

Most teams in the Region have some experience with daily visual management; they have a visibility wall and are doing regular huddles around it. Many teams are finding great value in this process, reporting huge improvements in team communication and cannot imagine going back to doing things ‘the old way’ again. However, other teams are still struggling to make visual management a natural part of their daily routine. Deciding on what metrics to track can be difficult and daily huddles can quickly turn into lengthy team meetings with loss of staff attention and buy-in. Even though the visibility walls and huddles should be driven by the team, in many areas, huddles are not happening when the managers are not around.

In general many teams still have opportunity to improve so that visibility walls and huddles are used to their fullest potential – as a tool to manage the daily work and to make daily improvements.

The purpose of the toolkit is to:
- Describe the ideas behind conducting daily huddles and the connection with visibility walls.
- Provide tips and ideas and key things to remember about visual management.
- Outlining the key steps in having a fully implemented visual management system.

Daily Huddles

The purpose of a huddle is to manage your daily work, to know how you are doing, to surface concerns (safety, quality, cost etc.), identify defects in the daily flow that affect staff, physicians, or the people we serve – basically improve communication and create a culture of making daily improvements.

It is a Huddle, Not a Meeting

Investing 5-10 minutes a day to share safety concerns, priorities, issues and victories as a group can provide big payoffs with accelerated execution and increased efficiency. Take advantage of having the entire team’s attention and use the huddle to identify areas of improvement.

Remember, the huddle is about sharing information, not problem solving. If a bigger problem arises that requires more than 2-3 minutes, the discussion should be moved offline for the necessary parties. Make sure you start and end on time; it is a good idea to have a time keeper at the huddle. Keeping time is not to cut people off but to respect people’s time; if the huddle starts to go longer than 15 minutes, people will drop the habit.

Consider this...

How long are your team huddles for the most part? How long are they scheduled to be?
Return on Investment

When beginning to implement daily huddles, immediate pushback can include hearing “We are too busy” or “We don’t need a meeting when we are seeing each other all day long”. Yet, routine and standard work actually sets a team free; teams that huddle daily find they interrupt each other considerably less the rest of the day. There is a fixed time when everyone knows they’ll have everyone else’s attention. Meeting daily also clears up issues that otherwise linger to clog up the weekly or monthly meeting. The daily huddles are particularly key when departments or units are the busiest and spread the thinnest; it ensures the team knows the priorities and is equipped to keeping their daily tasks aligned with the plan. And it helps keep the morale high in the difficult times. Don’t forget that it is possible to do a ‘virtual huddle’ over the phone.

Daily or Weekly Huddle

How often a team needs to huddle around the visibility wall depends on what type of operation the department or unit is running. When working in a 24/7 operation, a huddle at each shift change is often a good idea. For Monday to Friday, 8a.m.-5p.m. operations, daily huddles may not be necessary, but everyone should huddle at least weekly. Decide on a huddle schedule that makes sense for the work being done. Try something for a couple of weeks to see how it is working. It can also be beneficial to huddle if there are major changes in the work area or if a safety issue occurs, so the team can resynchronize their efforts, coordinate, communicate and flexibly adapt to the current situation.

Consider this...

Do you experience situations where it would be useful to pull the team together for a quick huddle?

Staff Should Lead

Once a team becomes familiar with the routine of daily huddles, it is a good idea to have different staff members leading the huddle. Having standard work for the huddle (see below) should make it possible for every team member to take turns facilitating it. This creates engagement and a sense of ownership – the huddle should not be just for the sake of the manager or supervisor, but for the entire team. This also means that even though the manager or supervisor is not present (e.g. on the weekends, at a different site or on evenings) the huddles should still take place.

Consider this...

How often does your staff lead the huddle?

See Appendix I for an example of standard work for a daily huddle.

Cascading Huddles

Once departments become familiar with daily huddles, the next step is implementing daily cascading huddles. Daily cascading huddles is a process that gives the leaders at the different levels in the organization a pulse-check as to what is happening in a department or unit that may impact other departments or the entire organization. For example, the number of patients waiting in the Emergency Department for an inpatient bed, or an illness outbreak on a unit, or broken equipment or environmental conditions that could affect the services provided or constitutes a risk to our patients or staff. Daily cascading huddles enables leaders to react in a timely manner to any problems arising and to escalate what cannot be solved to a higher level.
For the cascading huddles to be effective, they must follow a standardized process. Every team and leader needs to know exactly what type of issues must to be escalated to the next level and in which manner. Figure 1 illustrates how a cascading schedule can work in an organization.

![Figure 1 Example of a cascading huddle schedule](image)

After the morning huddle with the team, all the managers in one area participate in a 10 minute phone conference with their director. Here, they share pertinent information with the other managers and the director, such as safety concerns, staffing levels, and issues that can impact services. Managers from other areas do the same with their directors. After this huddle, the directors huddle in a 10 minute phone conference with their Vice President, share information that needs to be shared to be able to manage their operation and escalate concerns to be dealt with at a higher level in the organization. Directors from other areas do the same with their VPs. The final huddle is the VPs with the CEO, where the VPs escalate any information they have received through the previous huddles. In this example, within less than one hour the CEO will have knowledge of the status of the entire organization. There is also an option of adding service teams to the huddles to address immediate inquiries related to labor relations, infection control, finance, and facilities, etc.

Daily cascading huddles is an extremely effective and powerful way of communicating concerns and issues through a large organization and ensures leaders have the pivotal information to make decisions and respond in a timely manner to a situation that otherwise might have turned into a crisis situation.

Consider this...

What would daily cascading huddles look like in your area? How would you benefit from connecting with other leaders every day to inform your work? How often do you experience problems that could have been prevented or minimized with more efficient communication?

**Daily stat sheet**

A daily stat sheet can be used during the cascading huddle to capture the information flow between the different teams and levels of the organization. Often a lot of the information on the visibility wall is also what should be captured on the daily stat sheet. Most often the visibility wall does not contain historical data for the daily metrics – keeping them means running out of wall space. A daily stat sheet is a tool to capture this information for easy roll up during the cascading huddles. It helps teams to proactively run the day and learn and understand their business. It closes the information gaps and creates ongoing loops. At all levels of the organization, the daily stat sheet helps in the creation of daily work, prioritization of the team’s work, and provides meaningful data to be rolled up, creating cascading information daily.
**Visibility Walls**

A visibility wall is a tangible space where anyone can actively see pertinent information for a team’s daily work as well as the connection to the regional strategies and priorities. Visibility walls and daily huddles should be aligned and used together. This means that the key things that are being discussed at the huddle should be captured on the visibility wall. This enables everyone at any given moment to see what the status is on key issues so they can plan and prioritize their work.

Consider this...

Is your workplace visual? If you walked your workplace, can you quickly and easily see:

- Whether you are on plan, behind or ahead?
- What your key problems/issues are?
- What actions are being taken to address issues and by when?

The visibility wall has 3 areas: daily metrics, longer term performance indicators and improvement ideas.

**Daily Metrics**

Reflects the ‘pulse’ of the unit or the health of a process; what is going on right now that affects the daily work on a unit or area, such as staff shortages, safety issues, overcapacity, broken equipment, planned discharges or other events that affect the work in the area, and what needs to be put in place to deal with the issues of the day. Engage your team in selecting clear goals and targets to focus on!

*Picture 1 Daily Work Board – Unit 5A, Regina General Hospital*
Performance Indicators (QCDSE)
These indicators are more overall or long-term. They are often captured on a monthly basis and are linked to the strategic plan. They may roll up to a Director or Vice President so they can check how the organization is doing on key issues, follow up and change strategy if necessary.

Performance indicators need to cover several different areas, to create a complete picture of a work unit’s performance. The Region expects the indicators will cover the following: Quality, Cost, Delivery, Safety and Engagement / Morale (QCDSE/M). Examples of performance indicators include patient experience (Quality), budget variance (Cost), wait time for a service (Delivery), staff injuries (Safety) and staff turnover rate (Engagement / Morale).

Because these indicators are usually updated monthly it is a good idea to pick one each week to focus on in the daily huddle. Again, engage your team in this. Arrange a schedule of when to talk about the performance indicators to match the schedule of the regional wall walk. For example, during Week 4 discuss quality and safety as those indicators may roll up to the quality and safety indicators discussed at the regional wall on Week 1. During Week 1 discuss the Delivery and Engagement indicators; Week 2
discuss RPIW audit results and improvement ideas, especially those that align with the region’s strategic projects. During Week 3 discuss cost indicators (see also Appendix I). Since the value of these indicators is only changed monthly, there is no point discussing oftener. This also helps keep the daily huddle short.

Improvement Ideas: Better Every Day

Every day is an opportunity to create a positive experience for the people we serve, in how we work and interact with each other, and in how we deliver quality service. Every day is a chance to create better processes, to improve communication, and to clean up and organize to make a safer work environment, for example by doing 5S.

The visibility and daily huddles encourage seeing and following up on improvement opportunities. This is the heart of the Lean Management System: point of care and service staff identifying what could be improved in their work area and then carrying out the work to make the improvement. Every visibility wall needs a place where improvement ideas are noted, implemented and tracked. There is also an option to write the ideas down and start tracking how many ideas have been implemented over time, which can be used as an engagement indicator and an opportunity to celebrate the improvement ideas coming from the staff.
Seeing a list of implemented improvement ideas is very encouraging and inspiring for everyone. Improvements can be anything from daily 5S audits to big issues that the team works on for months. No matter what kind of improvements the team is doing, they need to set targets for their work – setting targets gives the team a clear sense of where they need to go, it increases the motivation for the work, and it reinforces that everybody is working towards the same vision. Studies show that when targets are set, they are more likely to be achieved.

**Setting SMART Targets**

When setting targets for improvement work, remember the acronym SMART:

- **Specific**: The first criterion stresses the need for a specific target rather than a more general one. This means the target is clear and unambiguous. To make targets specific, they must tell a team exactly what is expected, why it is important, who’s involved, where is it going to happen and which attributes are important.

- **Measurable**: Quantify how to measure the progress. If a target is not measurable, it is not possible to know whether a team is making progress toward successful completion. When setting a target identify what metrics to use to track the progress. Examples of metrics are number of staff injuries per month or number of overtime hours per month. A measurable target will usually answer questions such as: How much? How many? How will I know when it is accomplished?

- **Attainable**: It is important to set targets that are realistic and attainable. While an attainable target may stretch a team in order to achieve it, it is not extreme. When a team identifies a target that is most important to them, they begin to figure out ways to make it come true. They develop the attitudes, abilities and skills to reach those targets. An attainable target helps to identify previously overlooked opportunities. An attainable target will usually answer the question: How can the target be accomplished given the available resources?

- **Relevant**: This criterion stresses the importance of choosing targets that matter. Many times support is needed to accomplish a target: resources, a champion voice, someone to knock down obstacles. Targets that are relevant to patients/customers, the team or organization will receive that needed support. Relevant targets (when met) drive the team, department, and organization forward. A relevant target can answer yes to these questions: Does this seem worthwhile? Is this the right time? Does this match our other efforts/needs? Are we the right team to do this?

- **Time-bound**: A commitment to a deadline helps a team focus their efforts on completion of the target on or before the due date. This part of the SMART target criteria is intended to prevent targets from being overtaken by the day-to-day crises that invariably arise in an organization. A time-bound target is intended to establish a sense of urgency.
Key Things to Remember

Below are some key things to remember if you and your team feel stuck on your visibility wall.

- **Action**: Don’t have a target/metric on your visibility wall if you don’t have an action plan showing the work you are doing to try and improve on it.

- **Just do it**: Keep in mind that there are no right and wrong ways to selecting metrics and managing your visual displays of information so just pick something to get started. No matter what you pick you will continuously tweak it because the need keeps changing. If you wait until you are ready and have figured it all out, you will never get started.

- **Continuous improvement**: Or “Are we Lean yet?” Don’t be scared of the visibility wall, it won’t be perfect, ever! It’s not intended to be, it’s not wallpaper, it’s meant to be used, helpful and continuously updated and improved. What is important to focus on today might not be relevant in 6 months. Maybe it is a seasonal issue or the team has done tremendous improvement work and the issue no longer exists. It is now time to focus on another area.

- **Red is good**: When an indicator is not meeting the target it is considered ‘red’. That is not necessarily a bad thing; it means you are focusing on the right things to improve. If you have set targets that are SMART; specific, measurable, attainable, relevant and time-bound, and keep problem solving you should eventually reach your target. Think of red as an opportunity to improve.

- **Less is more**: Many teams find they are spending too much time at the visibility wall going over metrics. Focus on a few key indicators that make a difference in your daily work and that you are trying to improve on.

- **Focus on safety**: Increased safety for staff, physicians and the people we serve is a high priority for the Region and is something that should be discussed by every team, every day and at every wall. The safety concerns your team should be focusing on depends on the line of work your team does and what safety risks they encounter. Safety concerns can be everything from hand hygiene, infection rates, pressure ulcers, patient falls and medication errors to TLR, adherence to protocol, and use of PPE. Use the unit’s safety profile to identify what is important in your area.
“What’s the rock in your shoe?” Or “What’s in it for me?” If you experience problems with getting staff buy-in on visual management, it might be because you are tracking metrics on your wall or discussing things at the huddle that the team does not care much about or cannot influence. Ask the team what they find frustrating about their daily work. This is a good way to start your improvement work and once the team discovers that their pain points are being addressed, they will see the value in the daily huddles and visibility wall. Remember, the visibility wall is not the manager’s wall; it is the team’s wall. Do keep in mind that there are some things, safety issues for example, that you as a manager can decide are pivotal for the daily work and must be tracked on the wall and discussed at the huddle. Try to find ways to make it exciting and interesting for the team. An engaged team around visibility walls, wall walks and huddles is the key to success!

One size fits nobody: What is tracked on each visibility wall and discussed at the daily huddle will vary because the metrics need to make sense for your work. Only the basic content areas need to be the same on all walls: daily metrics, longer term performance metrics and improvement ideas all of which show their connection to the regional and provincial plan.

Share the learning and learn by sharing: Go and visit other areas to see what they are tracking at their visibility walls – maybe they have something that would be relevant for your area too. It is perfectly acceptable in a Lean organization to “steal shamelessly”.

Level of Implementation: From Wallpaper to Kaizen

Having a well-functioning visual management system is a stepwise (gradual) process and takes time and lots of adjustments – it is Kaizen: continuous incremental improvement.

Overall, the process of going from simply having ‘wallpaper’ to utilizing the visual management system to its fullest potential can be broken down into three key steps:

1. Managing daily work
2. Creating and following standard work
3. Using the visibility wall to drive improvements

Below are the three key steps outlined.

1. Managing Your Daily Work

Many managers experience their daily work as firefighting, and in a firefighting stance it is difficult to think about long-term targets, do a root cause analysis on problems encountered and free up resources to improve the performance of the team. This is the reason why the first step in the process of having a well-functioning visual management system is to use it to manage the daily work. This encompasses huddling around the visibility wall and talking about the daily business:

- What is happening today?
- What is our supply and demand today, e.g. staff shortages?
- Do we have any safety concerns?
- Do we have any equipment issues?
- Does anybody need help to manage their workload today?

This daily huddle around the visibility wall improves communication with the team and identifies problems that need to be dealt with before they grow out of proportion. This frees up resources to take it to the next step; create and follow standard work.
2. Creating and Following Standard Work

Standard work is key! It will help you build new habits and thus act into a new way of being and thinking. The agenda for the daily huddle should be the same structure every day, and it’s an agenda just a few items long: What is the critical information the team needs to run their business in a safe way and what daily measures do they need to track the progress of their work and create opportunities for daily improvements?

Depending on the size of the team and the line of work, it might be a good idea to do a round table where each attendee or sub team shares “what’s up” for today. The key is to highlight specifics without simply reading one’s ‘to do’ list. This lets people immediately sense concerns, conflicts, crossed agendas, priorities and missed opportunities. There’s something powerful in simply verbalizing, for the whole team to hear, everyone’s struggles or concerns – it is the first step to generating improvement ideas.

If standard work has been developed around the issues that need to be covered, it should be possible for every member of the team to lead the huddle and update the information on the visibility wall. As described above, this helps create ownership of the visibility wall and enables huddles to happen when the manager is not around.

“Without standards, there can be no improvement”
~ Taiichi Ohno

3. Using the Visibility Wall to Drive Improvement Work

The ultimate goal of a visibility wall is to drive improvement work (kaizen): the ideas that easily can be incorporated into daily work, and the more long term strategic targets.

Using the visibility wall to drive a team’s improvement work is the essence of lean. Just understanding what the metrics show is good to know, but the real impact is using the information from daily huddles to actually create improvement. Using the visibility wall to drive improvement work is the difference between going from “good to know” about the metrics to “so what can we do to change or improve that?”

Typical thinking: Daily management plus process improvement.
Lean thinking: Daily management is process improvement.

The power for improvement really comes from all the point of care and service staff problem solving and improving performance. Developing staff to encourage this is accomplished through coaching teams to see variation and defects; to gather, use and interpret data and to use PDSA thinking to make improvement daily, weekly and monthly.

What Is Your Score?

The Region is starting to use a scoring tool to help teams identify where they are in their visual management journey. The scoring tool gives specific guidance on what areas the team need to improve on to be able to move to a higher level of visual management implementation and reach the ultimate goal - using the visibility board and daily huddles to drive their improvement work.

The scoring tool is developed on the basis of the three steps described above, and the idea is that the team cannot move to the next step without finishing the previous one. It is centered on the level of implementation in two areas; daily metrics and performance indicators (see above).
References

- Better Everyday, Visual Management – Taking It to the Next Level, Kaizen Promotion Office, Saskatoon Health Region
- Coaching Out of the Box®. Participant’s Workbook
Glossary of Terms

5S
Five terms beginning with 'S' used to create a clean and well-organized workplace.

- Sort: Separate and remove unnecessary tools, parts and instructions, etc., from the work area.
- Simplify: Neatly arrange and identify or label tools for ease of use.
- Sweep: Identify potential problems, and deal with unsafe conditions or damaged equipment.
- Standardize: Identify and define how a task should best be done and communicate this best practice to all involved.
- Self-Discipline: Ensure that the area remains clean and organized and that the new processes are maintained by everyone.

Cycle Time
The amount of time it takes to complete a task or process.

Daily metric
Reflects the ‘pulse’ of the unit or the health of a process; what is going on right now that affects the daily work on your unit or in your area.

EPP
Emergency Preparedness Plan

Gemba
Japanese word of which the literal translation is “the real place.” It refers to the place where the actual services are provided or where the work is done, i.e. where value is created.

Kaizen
A Japanese term meaning “change for the better” or continuous incremental improvement.

Lean
A system where all parts of the process are focused on eliminating waste while increasing the amount of value-added work. Lean is a bottom-up approach and relies on people closest to the work to identify and fix broken systems.

PDSA
Plan-Do-Study-Action Cycle. It is the continuous sequence of actions or events necessary for improvement and control.

- Plan: Establishing a plan and methods for achieving your target and predicting results.
- Do: Enacting the plan, educating, doing.
- Study: Measuring and analyzing the results, studying the results and methods.
- Act: Implementing the necessary changes when the results are not as originally planned, acting to correct, maintain or improve.

Performance indicator
These indicators are overall or long-term indicators that provides specific information on the state or level of a unit or a department. They are often captured on a monthly basis and are linked to the strategic plan. Performance indicators need to cover several different areas, and are often captured under the categories: Quality, Cost, Delivery, Safety and Engagement / Morale (QCDSE).

PPE
Personal protective equipment.

Standard Work
A prescribed, repeatable sequence of steps (or actions) that balances people’s work to meet customer demand (takt time).

TLR
Transfer, lifting and repositioning.
## Appendix I: Daily Huddle Standard Work Example

<table>
<thead>
<tr>
<th>Task</th>
<th>Task Definition</th>
<th>Cycle Time (min:sec)</th>
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| 1.   | **Update the visibility wall while asking the following questions to the team:**  
      **Do we have any safety concerns? Can we resolve it ourselves or do we need to escalate it?**  
      - Did anyone get hurt? Any near misses?  
      - Did we hurt anyone? Any near misses?  
      - Any infections / outbreaks?  
      - Are our work areas tidy and hallways clear? | 2:00 |
| 2.   | **Issues relating to quality:**  
      - Any staff shortage? Any staff with special concerns or barriers?  
      - Any patient / customer complaints or follow up?  
      - Any equipment or environmental concerns? | 1:00 |
| 3.   | **Issues relating to delivery:**  
      - Do we have available capacity today?  
      - Any barriers to meeting our demand today?  
      - Any urgent requests from the people we serve? Any no-shows?  
      - Does anyone need support to manage their work today? | 1:00 |
| 4.   | **Issues relating to cost:**  
      - What is impacting (+/-) our finances?  
      - Anybody working overtime? | 1:00 |
| 5.   | **Does anyone have any improvement ideas? Can we do it today?**  
      Add any ideas to the action board that cannot be resolved right away. Assign a person responsible for the action item and a target date | 1:00 |
| 6.   | **Review action board.** Review any Action items on the board that are past deadline or have red status.  
      - Red status: Action item is not moving forward. What needs to be done to address the issue? What help is needed from the team?  
      - Green status: Action item is moving according to plan. | 1:00 |
| 7.   | **Performance Indicators:** How are we doing on our QCDSE?  
      - Week 1: Delivery & Engagement (Morale)  
      - Week 2: RPIW audit results or improvement ideas related to strategic projects  
      - Week 3: Cost  
      - Week 4: Quality & Safety | 2:00 |
| 8.   | **Happy news:** What or who should we celebrate or recognize today? | 1:00 |

Total time: 10:00
**Name of Activity:** KPO’s Weekly Wall Walks  
**Role Performing Activity:** KPO Staff, Wall Walk Leads, Timekeeper

**Electronic Location:** C:\Users\vejdanifaizi\Documents\Lean Education\DVM\Standard Work\KPO’s Weekly Wall Walk.docx  
**Hard Copy Location:** 2180 E Victoria Ave, Regina

**Department:** KPO  
**Document Owner:** Faizi Vejdani  
**Position:** Standard Work & Replication Specialist  
**Email:** Faizi.Vejdani@rqhealth.ca

**Source of Standard Work:** Regina Qu'Appelle Health Region  
**AND/OR**  
Click here to enter text.

**Initial Date Prepared:** 26/05/2015  
**Status Date(s):** 01/06/2015  
**Status:** Trial

Email electronic revisions to: Replication.Specialist@rqhealth.ca

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**Standard Work Summary:** Weekly Wall Walks are done on a rotational basis from Wall-to-Wall from 8:15AM to 8:45 AM every Monday and START ON TIME and will END ON TIME! Prior to the Wall Walk, a timekeeper will be selected and one Wall Walk Lead per pod or area will be chosen to speak to their respective Walls. All KPO Staff/Visitors must stand up in front of each Visibility Wall.

<table>
<thead>
<tr>
<th>Task Sequence (Order in which tasks occur)</th>
<th>Task Definition (Brief summary of task)</th>
<th>Task Cycle Time (Define unit of measure – Seconds, minutes, etc)</th>
</tr>
</thead>
</table>
| 1.                                        | A KPO Staff will welcome the group to the KPO’s Weekly Wall Walk.  
   a. Acknowledge and welcome any special guests/visitors.  
   b. Indicate the purpose behind the rotational Wall Walk.  
   c. Announce what is the QCDSM measure theme of the week that each Wall Walk Lead will be speaking to.  
   d. Also note that each pod/area will have to discuss any improvement ideas generated/implemented and any issues/barriers around your work for the week.  
   e. Emphasize that each pod or area will receive a total TAKT Time of 4 min to discuss tasks 3, 4, & 5.  
   f. Notify the group who the timekeeper will be. | 20 sec |
<p>| 2.                                        | Proceed to the first/next Wall. | 10 sec |
| 3.                                        | Report out on only <strong>one</strong> QCDSM measure associated to this week’s theme (e.g., Safety): | 2 min |</p>
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<th></th>
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<tbody>
<tr>
<td>a.</td>
<td>One team member focuses on a measure that they have worked on.</td>
<td></td>
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<tr>
<td>b.</td>
<td>Indicate what stage of the project you are in.</td>
<td></td>
</tr>
<tr>
<td>c.</td>
<td>Indicate any barriers (if any) you are running into.</td>
<td></td>
</tr>
<tr>
<td>d.</td>
<td>Request help from other pods &amp; areas, if needed.</td>
<td></td>
</tr>
<tr>
<td>e.</td>
<td>Indicate if the measure’s status is green or red.</td>
<td></td>
</tr>
<tr>
<td>NOTE:</td>
<td>If you do not have a meaningful measure to speak to for this week’s theme, utilize your time to speak to something else on your Wall.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Report status on improvement ideas:</td>
<td>1 min</td>
</tr>
<tr>
<td></td>
<td>a.</td>
<td># of improvement ideas received this week.</td>
</tr>
<tr>
<td></td>
<td>b.</td>
<td># of improvement ideas in progress.</td>
</tr>
<tr>
<td></td>
<td>c.</td>
<td># of improvement ideas completed.</td>
</tr>
<tr>
<td></td>
<td>d.</td>
<td># of improvement ideas not started.</td>
</tr>
<tr>
<td>Note:</td>
<td>If there is any time remaining, highlight any improvement idea that you feel is worth mentioning to the group. How did it go? Did it work well? What have you noticed? Any a ha moments?</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Report on any issues/barriers around your work for the week. (This can be rolled up to the Executive Director/Vice-President for help).</td>
<td>1 min</td>
</tr>
<tr>
<td>6.</td>
<td>Repeat Tasks 2, 3, 4 &amp; 5 until all pod’s or area’s Wall Walks have been completed.</td>
<td>*****</td>
</tr>
</tbody>
</table>

Tab twice in field above to add next task definition.
## Appendix IV: Daily Stat Sheet Example

<table>
<thead>
<tr>
<th>Week of: Department:</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
<th>Sun</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Safety</strong></td>
<td></td>
<td></td>
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<tr>
<td>Staff injuries?</td>
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<td>Infections/outbreaks?</td>
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<tr>
<td>Other safety concerns?</td>
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<tr>
<td><strong>Quality</strong></td>
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<tr>
<td>Any staff shortage?</td>
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<td>Any staff with special concerns or barriers?</td>
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<td>Any patient / customer complaints or follow up?</td>
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<td>Any equipment or environmental concerns?</td>
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<tr>
<td><strong>Engagement</strong></td>
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<tr>
<td>Who is going to need the most support today?</td>
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<td>What or who should we celebrate or recognize?</td>
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<tr>
<td><strong>Delivery</strong></td>
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<tr>
<td>What might be our barriers?</td>
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</tr>
<tr>
<td><strong>Cost</strong></td>
<td></td>
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<tr>
<td>What is impacting (+/-) our financials?</td>
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<tr>
<td>Where are we with staffing (overtime, sick time etc.)?</td>
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</table>
Appendix V: Coaching by the Visibility Wall

Coaching is a skill that is important in the implementation of Lean Management. Lean emphasizes the participation of all staff in improvement work. In order for that to happen, managers and senior administrative people need to shift from directing staff and solving problems themselves to coaching others to solve problems through improvement. The conversations at the daily huddle and at gemba walks are a key place to use coaching skills.

The leaders' job is to develop confidence and provide support to enhance the skills, resources and creativity that the team already has. To engage in a coaching conversation means asking questions and having a mindset that allows you to be open, and to be conscious and aware of how you are approaching the team. Coaching questions should help refine an even deeper question and not simply give an answer. Remember, in a coaching approach, the leader does 20% of the talking and the coachee 80%.

Below are guiding principles and key things to do engage in coaching conversations. Below section is based on the 5/5/5 Coaching Model from Coaching Out of the Box®. This course, “Coaching Skills for Leaders”, is available to Saskatoon Health Region leaders through the Training Registration System.

How to Have a Coaching Conversation

Below are key things to do to engage others:

- **Encourage**: When encouraging the team, it empowers them to keep going and indicates a level of trust you have in them. It also acknowledges them and their effort. E.g. “You are on the right track”; “You are doing just great”.

- **Ask questions**: A leader asks questions for all sorts of reasons, not just find out information. Questions are used to plant seeds, make a point, express interest and support, to gain knowledge etc. The questions should be clean of assumptions and judgments.

- **Support action planning**: A coaching conversation is merely interesting without action. An action plan allows the teams to focus, organize, define needs, analyze and strategize. As a leader, part of your role is to support action planning and eventually move the team to a place where that becomes the way they do business; “Who is accountable for what and when is it due?” , “What are the resources required to accomplish this?”

- **And above all listen**. Listening with the intent to understand and learn is the foundational skill where coaching conversations begin.

A Coach Approach Makes for an Engaging Discussion

Powerful coaching questions stem from genuine curiosity; they stimulate reflective thinking and conversation and are thought-provoking. When having a coaching conversation, use open ended questions that begin with ‘how’ and ‘what’, which demands thinking and requires the coachee or team to reach within for an answer.

Below is a list of examples of coaching questions to ask for the different steps in a coaching exchange. They are designed to identify an issue, explore it, come up with a plan to address it, address barriers, and hold the party accountable for carrying out their solution. Remember, this is a guide, not a script. Conversations with groups are dynamic, and may cycle back to repeat different steps.

Use clean and open ended questions, that begin with ‘How’ and ‘What’.
1. **Identifying:** For clarifying what needs to be talked about today

- What is the problem we’re trying to solve?
- What do we want to address by next shift / week / month?
- How will we know when we’ve made a shift on this one?
- What happened yesterday that we can learn from to do better today?
- What are the indicators telling us?
- What targets are red, and need our attention today?
- How would we describe what’s happening vs. what should be happening?
- What would we like to see happen?

2. **Discover:** For exploring what we know about the issue that needs improvement

- What do we know about this that is contributing to our results / trend?
- How do we know this is happening?
- What is really important about his issue?
- What’s the worst / what’s the best that could happen if this continues?
- What is most uncomfortable about making a change?
- How big is the issue?
- Who else is impacted by this?

3. **Strategize:** For identifying an action plan to move the issue forward

- What would make the biggest difference in improving this result?
- What do we already know about how we fix this?
- What are our next steps? What can we try?
- What resources could we tap into?
- What changes would turn things around?
- Who is doing what?

4. **Clear the way:** For determining what might get in the way of the action plan

- What do we need to stop / start to get this done?
- What would make the biggest difference in supporting this?
- What support do we need?
- What impact will our action have on others?
- What can we do to ensure their support?
- What might get in the way of us making this happen today?

5. **Recap:** For confirming the actions and accountability for the plan

- What have we agreed to do?
- Could someone summarize what’s going to happen with regard to this issue?
- What follow up do we need on this issue?
- How will we check in with each other on this issue?
Appendix VI: Visual Management Level of Implementation

The scoring tool for assessment of the visual management level of implementation can be used by the manager to use with their teams on their own board, or by the Director or Vice President when they do their gemba walks. The scoring tool can be used to score visibility walls at all levels of the organization, e.g. the director and Vice Presidents visibility walls.

The scoring is based on the principle of three levels of implementation for both daily metrics and performance indicators (QCDSE):

1. **Regular huddles**: The wall is up-to-date and the team huddles preferably daily, minimum weekly for daily metrics (monthly for performance indicators) around the wall.
2. **Follow standard work**: The team has standard work in place for huddles around the wall and it is being followed.
3. **The team uses the visibility wall to drive their improvement work**.
<table>
<thead>
<tr>
<th>Stage</th>
<th>Rating</th>
<th>Minimum criteria</th>
<th>How to get to a higher score?</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.</td>
<td>Undesirable&lt;br&gt;No evidence of daily visual management</td>
<td>None.</td>
<td>Start building your visibility wall. Use the Visual Management Toolkit to help identify metrics that would be relevant for your team.</td>
</tr>
<tr>
<td>1.</td>
<td>Weak&lt;br&gt;Evidence of a daily visual management system up, but not up to date.</td>
<td>• The team has (old) daily metrics on their wall.  &lt;br&gt;• The team has (old) performance indicators on their wall.  &lt;br&gt;• There is no space identified for improvement ideas/action items on the wall.</td>
<td>• Update your daily metrics and start huddling daily or a minimum of weekly around the wall.  &lt;br&gt;• Update the performance indicators and start huddling weekly around the wall.  &lt;br&gt;• Engage your team/staff in selecting measures and targets.  &lt;br&gt;• Create a space on your wall for your staff to create improvement ideas.</td>
</tr>
<tr>
<td>2.</td>
<td>Fair&lt;br&gt;Some evidence of daily visual management</td>
<td>• The team has regular huddles around their metrics.  &lt;br&gt;• The team has regular huddles around their performance indicators.  &lt;br&gt;• The team/staff have been engaged in selecting targets and measures.</td>
<td>• Have regular huddles around your daily metrics and your performance indicators.  &lt;br&gt;• Create and follow standard work for huddling around your daily metrics as well as performance indicators.  &lt;br&gt;• Support your team to try their improvement ideas.  &lt;br&gt;• Don’t have a measure on your wall that you do not have an action behind.</td>
</tr>
<tr>
<td>3.</td>
<td>Good&lt;br&gt;Evidence of daily visual management</td>
<td>• The team has regular huddles around their daily metrics and performance indicators.  &lt;br&gt;• The team is engaged in the huddles (daily and/or weekly).  &lt;br&gt;• The team follow standard work around their daily metrics and performance indicators.  &lt;br&gt;• All measures on the vis wall have an action plan around it.</td>
<td>• Create and follow standard work for your daily metrics and have regular huddles around your performance indicators.  &lt;br&gt;• Use your daily metrics along with your performance indicators to drive your improvement work.  &lt;br&gt;• Continue to support your team with their improvement ideas.  &lt;br&gt;• When measure is green/sustained, have a plan to bring in a new metric.</td>
</tr>
<tr>
<td>4.</td>
<td>Excellent&lt;br&gt;Clearly established goals and targets</td>
<td>• The team follows standard work for their daily metrics/huddles and they have regular huddles around their performance indicators.  &lt;br&gt;• The team uses their daily metrics along with their performance indicators to drive their improvement work.  &lt;br&gt;• The team changes out green sustained metrics to focus on another area for improvement.</td>
<td>• Continue to use both your daily metrics and your performance indicators to drive your improvement work.  &lt;br&gt;• Multiple team members take turns leading the huddle.</td>
</tr>
<tr>
<td>5.</td>
<td>Outstanding&lt;br&gt;Fully functional daily visual management</td>
<td>The team uses both daily metrics/huddles and performance indicators to drive their improvement work.</td>
<td>There is no higher score. You have reached the ultimate level of implementation; you are using visual management to drive your daily improvement work and your long-term improvement work. Keep up the great work!</td>
</tr>
</tbody>
</table>