

Visual Management

What is visual management?

Visual management is any communication device used in the work environment that tells at a glance how work should be done and whether it is deviating from the standard. These visual systems are designed to create transparency, reduce waste, and reduce interruptions in a process or environment. Controlling the execution of a process through transparency allows for manageable process control, which creates consistency. Attributes of process control include knowing who does what, knowing when action needs to be taken, and knowing how to deal with exceptions.

Visual management as a principle can be integrated into a workflow in a variety of ways. A starting point is to identify what information needs to be communicated and determine how to make that information readily available and easy to understand.

When should I use it?

Visual management is helpful for:

- Tracking project progress or process status
- Alerting teams to problems quickly
- Guiding user behavior

You should use visual management to support making invisible problems visible. These invisible problems could include situations like...

- **Wanting to know the status of a work-in-progress:** *You're anxious to get a contract signed, but it's delayed. Turns out it's waiting for your approval!*
- **Responsibilities are assumed or not clearly designated, therefore tasks fall through:** *Your 5-person team is preparing for a complex event with a lot of tasks. No one ordered lunch for the event; everyone thought someone else was handling it*
- **Wanting to ensure that process steps are fully completed, without errors and extra work, and that it is moving through the process:** *You apply for a building permit, but you aren't sure whether your application was received, whether it was completed properly, what its status is, or how long it will take to approve*

Visual management examples:

Production Boards

Figure 1. – Making information readily available
Staff board displaying who is currently in and out of the office



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Figure 2. – Tracking project progress Denver Budget Office – budget book production board tracks progress noting what sections are assigned and completed. It’s posted in an area that is easily and often seen by staff.



Visual Standards – Alerting teams to problems quickly

Figure 3. Recreation and Parks Department – Sticker placed on broken equipment after a work order has been called in for repair. This alerts other users that action has already been taken and reduces multiple work orders for the same fix.

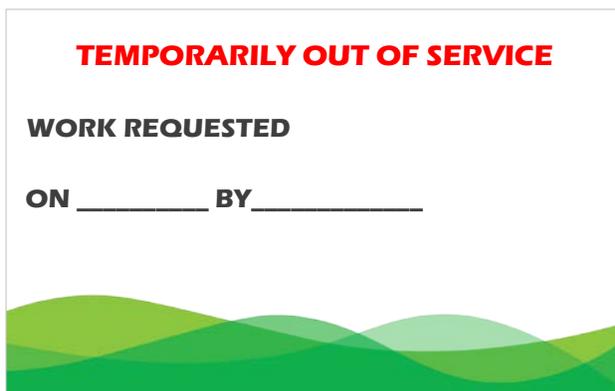


Figure 4. Related to Figure 3, This guide provides clear definition to the priority level of a work order submitted, to prevent all work orders from being incorrectly labeled based on what is occurring at the scene.



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Visual Guides – Guiding user behavior

Figure 5. Department of Elections – When elections are taking place in City Hall, the Department of Elections lay out visual cues to guide the customers to the right stations, in the right order. The use of foot-printing and numbering each station ensures the instructions for filling out a ballot are easy.



Figure 6. City Performance – Instead of sending mass emails for supply order requests, staff use this checklist to note which items need to be ordered. Staff now reduce the redundancies of requesting the same items, and it is placed near the supply drawer.

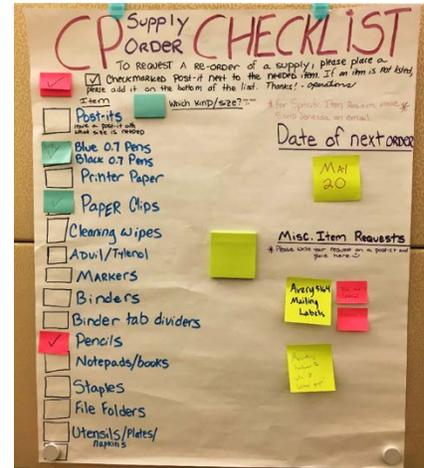
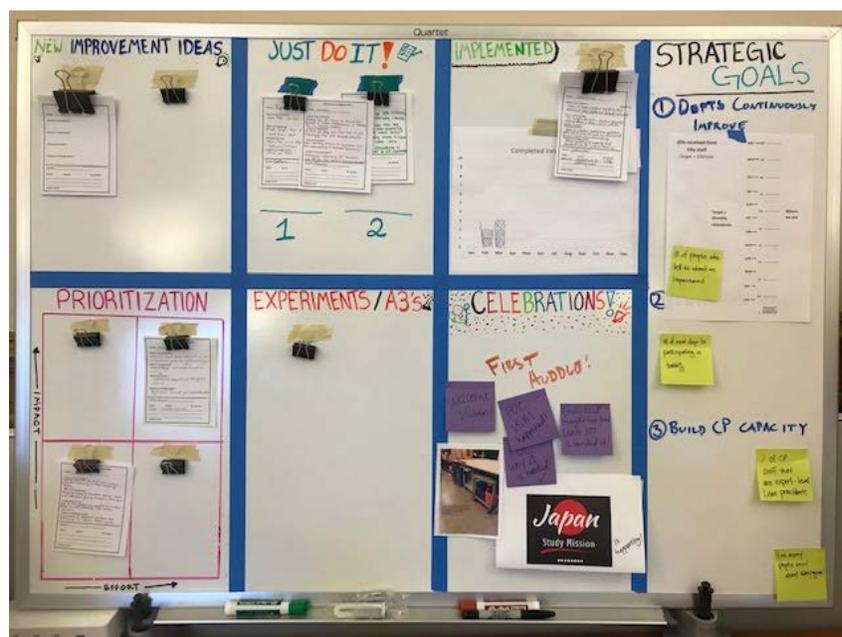


Figure 7. City Performance – The huddle board is a visual guide to practicing regular communication and continuous improvement for team check-ins. It helps the team to value data by discussing strategic goals and encourages staff to brainstorm ideas for improvement regularly.



How do I facilitate or create it?

1. Identify the information that needs to be communicated

Figure out what information is currently not being communicated, or information status is difficult to readily understand (i.e. whether the task at hand is currently being worked on, has this person already been notified of the request, is it waiting somewhere, etc.)

2. Create a signal

Identify and create the appropriate medium for communicating the information that will support the work environment, and clearly indicate when there's a deviation from the standard.

3. Define the appropriate action

Set a clear definition of what needs to happen to implement the new visual management cue.

4. Communicate actions

Be sure to communicate the new tool to anyone who will interact with it in the workplace and be open to feedback.

Strategies

- Place things in plain view (not buried in a document or an inbox)
- Make errors obvious, so you can fix them
- Rely less on reading, rely more on pictures, color-coding, shadowing, and foot-printing
- Create visual standard work
- Show the status of flow through a process
- Measure performance against goals, and post the results publicly

Hints

- Place signals where the information makes the most sense. It should live in a place where all who need to interact with it can access it easily and is the most visible. Think on the office wall, not hiding in an Excel file on a hard drive!
- Be creative! There are several different types of visual indicators, such as diagrams or pictures, checklists, videos, and signs. Each type has its own strengths and weaknesses. Choose the one that makes the most sense for your process.
- Be mindful of company culture and language barriers. Make sure that the system can be easily understood and accepted by all who might see it and use it.