|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **METADATA** | | | | | | | | | |
| **BUSINESS UNIT DETAILS** | | | | | **AUDIT DETAILS** | | | | |
| **Unit** |  | | | | **Date Conducted** | | |  | |
| **Director** |  | | | | **Conducted By** | | |  | |
| **Manager** |  | | | | **Conducted With** | | |  | |
| **TEAM HUDDLES** | | | | | | | | | |
| **QUESTIONS** | | **STATUS** | | | | **N/A** | **RESULT(S)** | | **COMMENTS** |
| Are huddles meetings kept to under 15 mins? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are all employees attending all huddles? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are you holding daily huddles? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are you following the Huddle Conversation Checklist? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| **VISUAL MANAGEMENT** | | | | | | | | | |
| **QUESTIONS** | | **STATUS** | | | | **N/A** | **RESULT(S)** | | **COMMENTS** |
| Is the visual board being updated prior to huddles? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are all sections of your board populated and updated regularly? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are you using charts to visualize your data? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are you posting trending data? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Do you have measures related to outcomes? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Do you have measures related to customer satisfaction? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are your improvement opportunities assigned to someone and do they include timelines? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are successes being captured? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| **LEADER STANDARD REPORTING AND REVIEW** | | | | | | | | | |
| **QUESTIONS** | | **STATUS** | | | | **N/A** | **RESULT(S)** | | **COMMENTS** |
| Are leaders performing Leader Walks?  (reference visual board) | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are Leaders regularly attending huddles? | |  |  |  | |  |  | |  |
| Are leaders signing the visual board when they perform Leader Walks? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are leaders engaging front line staff in a Leader Walk Conversation as part of Leader Walks? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Is the Leader Walk Conversation Checklist being used? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Have cascading reporting LSW meetings been established?  *(list the levels and frequency in the “results” section)* | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Do Directors have weekly meetings with Managers? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are the results from the Board incorporated into LSW meetings? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| Are Leaders using standard reporting requirements from their direct reports? | | ❑ | ❑ | ❑ | | ❑ |  | |  |
| **METRICS *(reference LSW reports)*** | | | | | | | | | |
| **QUESTIONS** | | **RESULT(S)** | | | | | | | **COMMENTS** |
| Have your measures changed over time? How? | |  | | | | | | |  |
| Are you receiving valuable ideas for improvement from your employees? | |  | | | | | | |  |
| Are your measures related to your service offers? | |  | | | | | | |  |
| How many improvement opportunities have been identified since last audit? | |  | | | | | | |  |
| How many improvement opportunities turned into I&I improvement projects? | |  | | | | | | |  |
| What is your average percent attendance at your huddles? | |  | | | | | | |  |
| What is the average time at your huddles? | |  | | | | | | |  |
| Have you eliminated or reduced the amount of time spent in meetings as a result of Daily Management? *(review the Leader Standard Work section of the Service Profile)* | |  | | | | | | |  |
| **CULTURE** | | | | | | | | | |
| **QUESTIONS** | | **COMMENTS** | | | | | | | |
| Has Daily Management had an impact on employee engagement for your team? | |  | | | | | | | |
| Do you feel that Daily Management has increased overall accountability for results? | |  | | | | | | | |
| What impact have Leader Walks had from an employee engagement perspective? | |  | | | | | | | |
| Do you see the value in Daily Management? | |  | | | | | | | |
| Has Daily Management helped to focus and align discussions related to measures and outcomes? | |  | | | | | | | |
| **IMPROVEMENT OPPORTUNITIES** | | | | | | | | | |
| **QUESTIONS** | | **COMMENTS** | | | | | | | |
| Have you identified any improvement opportunities that you feel the Process Improvement team can assist with? | |  | | | | | | | |
| Do you have any suggestions on how to improve Daily Management? | |  | | | | | | | |
| Do you have any other comments or suggestions for improvement? | |  | | | | | | | |