Daily Management
Accountability, Communication, and Metrics

Canadian Lean Summit
April 26, 2017

Daily Management
Accountability, Communication, and Metrics

Canadian Lean Summit
April 26, 2017

Plan
Act
Do
Check

Fredericton
OUR TRADITION IS INNOVATION

Agenda

1. Introductions
2. What is Daily Management? (30 min)
3. The Three Pillars and Cascading Metrics (45 min)
4. **Question period**
5. Sample Daily Management Sessions (10 min)
6. Sample Visibility Boards (15 min)
7. Implementation methodology (15 min)
8. Successes and Roadblocks (15 min)
9. **Question Period**
10. Personalize your board (15 min)

Fredericton
OUR TRADITION IS INNOVATION

Daily Management – What it is

- A quick 5-15 minute session to sync up
- All members of the workgroup
- Using a "Visibility Board" to capture and share information
- Standard reports to / from management

Fredericton
OUR TRADITION IS INNOVATION

Daily Management Benefits

- Helps **focus** the organization (department, team, individual...)
- Encourages two-way **communication**
- Increases **employee engagement**
- Drives **continuous improvement**

Fredericton
OUR TRADITION IS INNOVATION

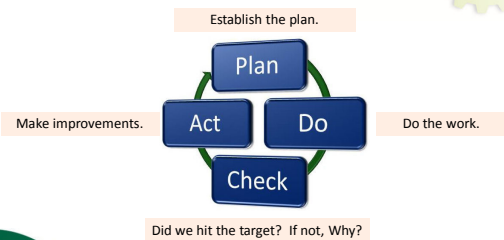## Daily Management – What it is __not__

- A tool for individual performance management
- A replacement for all other staff meetings
- A forum for deep dives into issues

Fredericton
OUR TRADITION IS INNOVATION

Daily Management

A **focused team** approach to **regularly** communicate, monitor, and **improve** work**.**

Establish the plan.

Plan

Make improvements.   Act   Do   Do the work.

Check

Did we hit the target? If not, Why?

Fredericton
OUR TRADITION IS INNOVATION

Plan — What we plan to do

1. Why are we here?
2. Mission Statement, Goals – Corporate, Departmental, Divisional
3. Long term projects
   → Scheduling
   → Resourcing
   → Timelines
4. Events – training, conferences, vacations

Fredericton
OUR TRADITION IS INNOVATION

Do — What we are doing

1. Daily / Weekly assignments
2. Tracking vacations, out of office
3. Training, meetings
4. Work outside the unit which pulls staff away

Fredericton
OUR TRADITION IS INNOVATION

Check — How are we doing

1. Metrics and KPI's
2. Plan vs. Progress
3. Targets and Milestones
4. Health of the group
5. Roadblocks "What got in our way"

Fredericton
OUR TRADITION IS INNOVATION

Check — What got in our way

What Got in Our Way?

How many times? — 9 8 7 6 5 4 3 2 1

Team Availability / Poor Planning / More Research Required / Spinning our wheels / Trying to be too perfect

Fredericton — OUR TRADITION IS INNOVATION
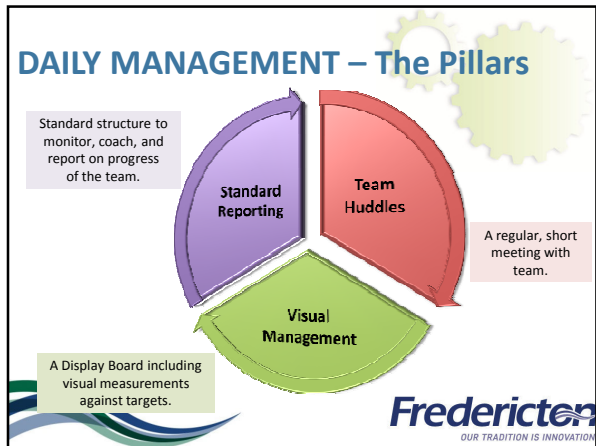

Act — How are we improving

1. Issues identified
2. Adjust timelines as necessary
3. Removing roadblocks
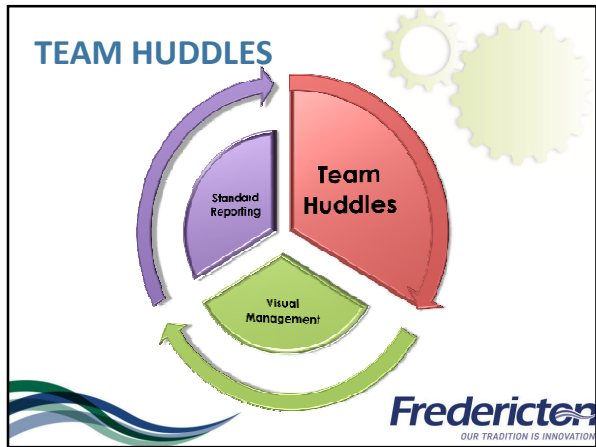   → Team input / communication
4. Successes
5. Ideas for improvement

Fredericton — OUR TRADITION IS INNOVATION

STANDARD REPORTING – Ideas / Issue Tracking

HOW WE ARE IMPROVING	
Date:	
Identified By:	
Issue Description:	
Project Type:	Just Do it / Waste Walk / Project
Assigned to:	
Action Taken	Date

4

DAILY MANAGEMENT – The Pillars

Standard structure to monitor, coach, and report on progress of the team.

Standard Reporting

Team Huddles

A regular, short meeting with team.

Visual Management

A Display Board including visual measurements against targets.

TEAM HUDDLES

Standard Reporting

Team Huddles

Visual Management

Team Huddles *("Stand-Up Meetings")*

- ✓ Quickly come together to "get on the same page" – stay standing
- ✓ Everyone participates
- ✓ Keep it short (5-15 minutes)
- ✓ Regular frequency (daily or weekly)
- ✓ Occurs at the visual board
- ✓ Information flows up and down through the workgroup

Huddle Checklist

"OK team…
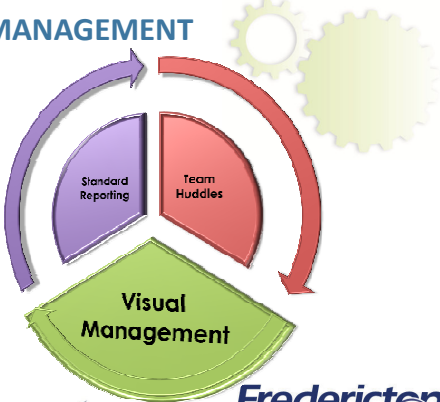
- ❑ Any safety concerns?
- ❑ Any customer concerns?
- ❑ What went well/poorly since the last huddle?
- ❑ Did we achieve our goals?
- ❑ What got in our way?
- ❑ Can we fix it today?
- ❑ Do we need to adjust our plan?
- ❑ Any successes to share?"

Fredericton
OUR TRADITION IS INNOVATION

Customize Your Checklist

Monday:	Identify plans for the week
Tuesday:	Review our measures
	Any customer / quality concerns?
Wednesday:	Review long term plans / goals / timelines
	Anything getting in our way / roadblocks?
Thursday:	Recognize someone within / outside our group
	Any safety or equipment concerns?
	Review Issues / Ideas for Improvement
Friday:	Review the weekly plan -- are we on
	track to deliver?
	What are our successes?
	Vacation / events coming up?

VISUAL MANAGEMENT

Standard Reporting

Team Huddles

Visual Management

Fredericton
OUR TRADITION IS INNOVATION

DAILY HUDDLE BOARD				
Who We Are	PLAN/DO	CHECK	ACT	
CORPORATE	WHAT WE PLAN TO DO	HOW ARE WE DOING	HOW ARE WE IMPROVING	SUCCESSES
VISION MISSION			ISSUES IDENTIFIED / IDEAS FOR IMPROVEMENT	
CORPORATE GOALS (CAO)				
DEPARTMENT GOALS			SOLUTIONS / IMPROVEMENTS IN PROGRESS	
DIVISION GOALS	WHAT WE ARE DOING	WHAT GOT IN OUR WAY	SOLUTIONS / IMPROVEMENTS IMPLEMENTED	LEADER CHECK IN
CORE PROCESSES				
EMPLOYEES			CANCELLED / DEFFERED	

Visual Management

When looking at your visual board **it should be easy to understand**:

- ☑ Why we do what we do (Corporate Vision / Goals)
- ☑ Our customers' needs and expectations
- ☑ What is our plan
- ☑ What we're working on
- ☑ Our key deliverables and targets
- ☑ The health of our processes (targets / roadblocks)
- ☑ What is being done to improve
- ☑ Successes

A visual board is NOT a decoration – it is a tool all staff should understand and be able to explain.

Fredericton
OUR TRADITION IS INNOVATION

STANDARD REPORTING

Standard Reporting

Team Huddles

Visual Management

Fredericton
OUR TRADITION IS INNOVATION
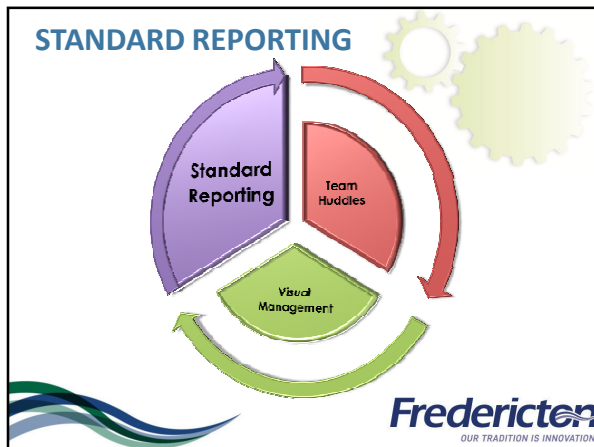
STANDARD REPORTING - Overview

- Evolves out of Daily Management over time
- A uniform way for two-way communication between staff and management
- All levels of the organization having the same discussion about the same **key** metrics at a regular frequency

Components of Standard Reporting

- Standard Work Reports
- Cascading Metrics
- Leader Walks / Check In

Fredericton
OUR TRADITION IS INNOVATION

Standard Reporting

Team Huddle

Manager / Team Meeting

Dept Head / Management Meeting

CAO / Dept Heads Meeting

Fredericton
OUR TRADITION IS INNOVATION
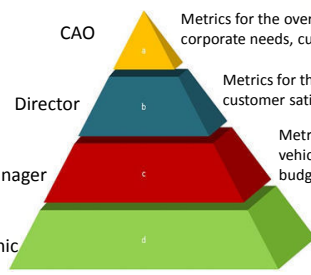
STANDARD REPORTING

Step 3 How we are doing?	Any safety concerns since last huddle? Any customer or quality concerns? Any concerns about resources(people, equipment, technology)
	What do we need to do? Who needs to be communicated with?
	Review metrics.
Step 4 What got in our way?	Why didn't we hit our target? What were the roadblocks?
Step 5 Ideas for Improvement	Can the team fix it ? How can we prevent it from happening again?
	Are there other ideas for improvement?
Step 6 Long term What we plan	Are we on track to hit our long term goals?

Cascading Metrics

- The mechanic wants to know about the car
- The manager wants to know about the fleet
- The Director wants to know about the budget and customer satisfaction with the service
- The CAO wants to know about the overall health of the service

Fredericton
OUR TRADITION IS INNOVATION

Cascading Metrics

CAO — Metrics for the overall health – meeting corporate needs, customer satisfaction

Director — Metrics for the service – overall budget, customer satisfaction, overall availability

Manager — Metrics for the fleet – sufficient vehicles cars vs. trucks, reliability, budget per line, cost per km

Mechanic — Metrics for the car – mileage, age, pm's due, time to service

Fredericton
OUR TRADITION IS INNOVATION

Front Line / Manager   Director

- Cost to complete a repair
- Age of the cars
- Age of the loaders
- Customer wait time
- Vehicle availability
- PM's completed on schedule

- YTD Budget
- Customer Satisfaction
- Overall availability

Fredericton
OUR TRADITION IS INNOVATION

As the metrics move up, level of detail goes down

- If detail is required, go to the lower level boards
- CAO board becomes an overall health dashboard of the organization

Fredericton
OUR TRADITION IS INNOVATION

CAO Dashboard

- Corporate health dashboard
- Track status with **Green Yellow Red**

Fredericton
OUR TRADITION IS INNOVATION

Fredericton
OUR TRADITION IS INNOVATION

Visual Tracking

Information, Improvement, and Innovation		Financials	Communications Management		Information Technology Solution Delivery	
	Attendance	Financials	Customer Satisfaction	Financials	Customer Satisfaction
	Employee Engagement	Effectiveness based on Proactive vs. Reactive News Coverage	Efficiency based on Planned vs. Unplanned News Releases	Projects on time	Projects on budget
	Customer Satisfaction			Tracking against IT Tactical Plan	Ability to meet requested timelines
	Continuous Improvement Targets	Information Technology Support		Request Management	
		Financials	Customer Satisfaction	Financials	Customer Satisfaction
		# after hours calls	Work orders assigned within 1	SLA's with individual Depts	GOS 80% or better as per SLA

Leader Standard Work – Leader Walks

Gives the Leaders Opportunities…
- to understand how the work gets done
  – Are the processes working properly?
- to improve communication
- to increase accountability – two-way
- for teaching, mentoring and coaching
- to understand and remove barriers
- to build relationships with employees
- to show management commitment
- to celebrate successes

"A visual board without leader walks is just wall paper…"
"…a leader walk without a visual board is just a social visit."

Fredericton
OUR TRADITION IS INNOVATION

Leader Walks

Improvement Innovation

Leader Walk Completed By (name & title):

QUESTION	NOTES
What are you measuring?	
How are you doing? How do you know?	
What metrics(KPIs) or successes are you most proud of?	
What are the challenges / barriers? Do you need any help from me?	
What areas of improvement are you currently working on?	
How do you see the link between these metrics(KPIs) and our strategic goals?	

Critical to driving two-way engagement and accountability

STANDARD REPORTING

	LEADER CHECK-IN			
Improvement Innovation	Suggested Question for Leader discussion with a staff member of the team as the visibility board is reviewed. *What are you measuring? How are you doing? What metrics(KPIs) or successes are you most proud of? What are the challenges / barriers? Do you need any help from me? How do you see the link between these metrics(KPIs) and our corporate and program goals?*			

Date	Leader	Team Member	Check In Notes

Fredericton
OUR TRADITION IS INNOVATION

QUESTIONS

Fredericton
OUR TRADITION IS INNOVATION

Sample Visibility Boards

- Inside Workers
- Outside Workers
- Personalization
- Standardization
- Cascading Information

Fredericton
OUR TRADITION IS INNOVATION

Innovation and Improvement

Recreation

Information Technology

Parks and Trees – Tree Crews

Water & Sewer crew

Water & Sewer Manager

Pollution Control – Electronic Board

Summary

1. Customize within standards
2. Common themes
   a. Shows how the work ties to the goals
   b. Helps the team understand the overall picture
   c. Everyone knows how well the team is performing
   d. Helps celebrate successes
   e. Helps deal with issues collaboratively
3. Employees have a place to be heard

Implementation

1. Presentation to management
   a. Gain buy-in
   b. Spawn interest
2. Select a pilot group (volunteers are great!)
   a. Determine the workgroup
   b. Determine the board owner (manager / supervisor)
3. Work together to determine the board type and location, (magnetic white board, cork board)
4. Mock up a board layout on paper
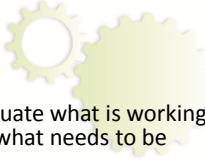5. Obtain printouts of Vision, Mission, Goals
   ▪ Do they tie together?

Implementation

6. Meet with the team to present what Daily Management is and is not!
   a. Have you ever thought we could do a better job communicating with each other?
   b. Ever feel like we're not coordinating events as well as we could?
   c. What would be beneficial to measure together?
7. Mount the board, apply a <u>tentative</u> layout
8. Have an initial team huddle – 15 minute target
   a. Members write in plans for the week / vacations / etc
   b. Group generates upcoming events / what would be helpful to know?

Fredericton
OUR TRADITION IS INNOVATION

Implementation

9. Set aside time monthly to evaluate what is working with the board / huddles and what needs to be tweaked
10. First few weeks develop 1-3 metrics that would be beneficial <u>for the team </u>to see
    a. Establish a baseline
    b. Update regularly
11. Have a senior manager come by to see how a huddle operates
12. Generate a "Leader Standard Report" weekly

Fredericton
OUR TRADITION IS INNOVATION

Successes

1. Employees engaged
   a. Feel they are heard, ideas noted
   b. Team cohesiveness
      i. See how their work is affecting the team
      ii. See the impact of the team on the business
      iii. Team input on overcoming obstacles
2. Consistent communication to all of the team
3. Team understanding of the customer needs
4. Better planning
5. Shorter staff meetings
6. Deal with issues faster / nip it in the bud

Fredericton
OUR TRADITION IS INNOVATION

Roadblocks

1. Time "We already have a three hour staff meeting every week"
2. Don't see the benefit – "We're different"
3. Fear this is micro-managing
4. Board placement
   a. Sensitive information / No wall space
5. Distributed workforce -- Time and shifts
6. Groups of 1 / Smaller operations
7. It goes stale
8. Metrics

Fredericton
OUR TRADITION IS INNOVATION

QUESTIONS

Fredericton
OUR TRADITION IS INNOVATION

Exercises

- Personalized boards
  - Lay out what your workgroup board should look like at your work location
    - Who would be involved
    - Who would be looking at it
  - 15 minutes to draft a layout
  - 10 minutes for comments / presenting what works

Fredericton
OUR TRADITION IS INNOVATION

DAILY HUDDLE BOARD

Who We Are	PLAN/DO	CHECK	ACT	
CORPORATE	WHAT WE PLAN TO DO	HOW ARE WE DOING	HOW ARE WE IMPROVING	SUCCESSES
VISION MISSION **CORPORATE GOALS (CAO)** **DEPARTMENT GOALS**	*Over the next month / quarter – forecasts / requirements*	*What do staff want to know / measure? What will help them?* *Are we meeting customer expectations?*	ISSUES IDENTIFIED / IDEAS FOR IMPROVEMENT	*Have a stock of cards / stars / etc to write these on*
			SOLUTIONS / IMPROVEMENTS IN PROGRESS	
DIVISION GOALS	WHAT WE ARE DOING	WHAT GOT IN OUR WAY	SOLUTIONS / IMPROVEMENTS IMPLEMENTED	LEADER CHECK IN
CORE PROCESSES **EMPLOYEES**	*Daily / weekly assignments, along with training / vacation / etc* *Organize by staff member, team, or crew as appropriate*	*Use note cards or graphics to understand barriers and how often they occur*	CANCELLED / DEFFERED	*Standard template*

Questions and Feedback

Wade.Kierstead@Fredericton.ca
Manager, Improvement and Innovation

Scott.Brown@Fredericton.ca
Manager, Building Services

1 (506) 460 2020

Fredericton
OUR TRADITION IS INNOVATION

Who We Are	PLAN/DO
CORPORATE	WHAT WE PLAN TO DO
VISION	
MISSION	
CORPORATE GOALS (CAO)	
DEPARTMENT	
DEPARTMENT GOALS	
DIVISION	
DIVISION GOALS	WHAT WE ARE DOING
CORE PROCESSES	
EMPLOYEES	

CHECK	ACT	
HOW ARE WE DOING	**HOW ARE WE IMPROVING**	**SUCCESSES**
	ISSUES IDENTIFIED / IDEAS FOR IMPROVEMENT	
	SOLUTIONS / IMPROVEMENTS IN PROGRESS	
WHAT GOT IN OUR WAY	**SOLUTIONS / IMPROVEMENTS IMPLEMENTED**	**LEADER CHECK IN**
	CANCELLED / DEFFERED	

Monday:	Identify plans for the week
Tuesday:	Review our measures
	Any customer / quality concerns?
Wednesday:	Review long term plans / goals / timelines
	Anything getting in our way / roadblocks?
Thursday:	Recognize someone within / outside our group
	Any safety or equipment concerns?
	Review Issues/Ideas for improvement
Friday:	Review the weekly plan -- are we on track to deliver?
	What are our successes?
	Vacation / events coming up?