

GETTING STARTED WITH

TEAM BOARDS

This resource was developed by the New Zealand Lean Academy where we're on a mission to make Lean Thinking sexy!

This eBook about team boards is just a tiny piece of the puzzle. We're building New Zealand's one-stop shop for Lean Thinking tools, templates, and ideas over at www.nzla.nz

Come and join us as we bring Lean Thinking to the people, and help make New Zealand the best place in the world to live and work.





Rob Bull

Co-Founder & CEO of
New Zealand Lean Academy

Good on ya for getting curious about visual management tools like Team Boards!

I'm a big fan of Lean Thinking, but holy-crap there's some wordy-jargon that comes with it! So I've worked hard to make this resource accessible and as practical as possible, giving you everything you need to get started with a team board without having to spend hours watching videos or poring through books.

When you have questions or need guidance on implementing great visual management or any other Lean methodologies, don't hesitate to reach out. Together, we can make New Zealand the best place in the world to live and do business.

Let's go!

Rob Bull



www.nzla.nz



Is it time for a **TEAM BOARD?**

Fed up with being rushed all the time? Welcome to Team Boards!

Ever seen your team leader racing around, trying to get updates on every job, while also barking out urgent messages (often the same thing, again and again!) about which customer is making the most noise? And for team members: Maybe you've felt that frustration too: waiting for paperwork, chasing parts, and only really getting stuck into work when the pressure hits, because no one really knows the due dates except the office team. Those random jobs getting pushed through, long after the 'plan' was set? It feels like chaos, and it's a drain on everyone.

That all changes with a visual Team Board.

Having a clear, high-level view of your team's operations, expectations, and performance isn't just 'nice to have' – it's absolutely critical for a smooth and orderly workplace. Creating that instant transparency, alongside clear accountability for everyone, is a fundamental building block for Lean Thinking.

Every business is different, so what information you show and how you present it visually will be unique. But there's always a way to create a powerful visual picture of your work. This direct feedback tool boosts communication and collaboration, ensuring everyone is on the same page, driving positive work flow, and making the start of every day much, much better.



What exactly are **TEAM BOARDS?**

Bad communication ends a lot of good things.
Good communication ends a lot of bad things.

A visual Team Board in your workplace quickly becomes the heart of your team's communication and planning. Think of it as the central hub where everyone gets a clear, instant update on what's happening. While its layout and how information flows can look different from team to team, it should always be designed to support your daily stand-up meeting.

A great Team Board typically includes:

- **Job Status and Updates:** A quick glance tells you what's on, its due date, who's working on it, and where it's at in the process.
- **Continuous Improvement Information:** Beyond just daily tasks, it keeps your team focused on finding better ways to work, encouraging that culture of excellence that we're after.
- **Performance Metrics:** Key numbers that give you instant insight into quality and lead measures, highlighting where the team is excelling and where there are opportunities to improve.

What a Team Board doesn't include is the general notice board stuff or any information that isn't directly related to daily or weekly operations. While that info is useful, this specific tool is all about creating awareness, boosting teamwork and accountability, and providing a crystal-clear communication point for everyone, all focused on getting the job done well.

TEAM BOARDS

This board is tracking the current and upcoming jobs for a mechanical repair firm. It quickly shows the team which jobs are in progress and whether they're on of off track.

It includes a dashboard for key measures, plus continuous improvement actions that the team have planned.

It took **many** iterations to get the team to this level of detail.

[illegible]

This Progress Key instantly lets people know which stage the job is at.

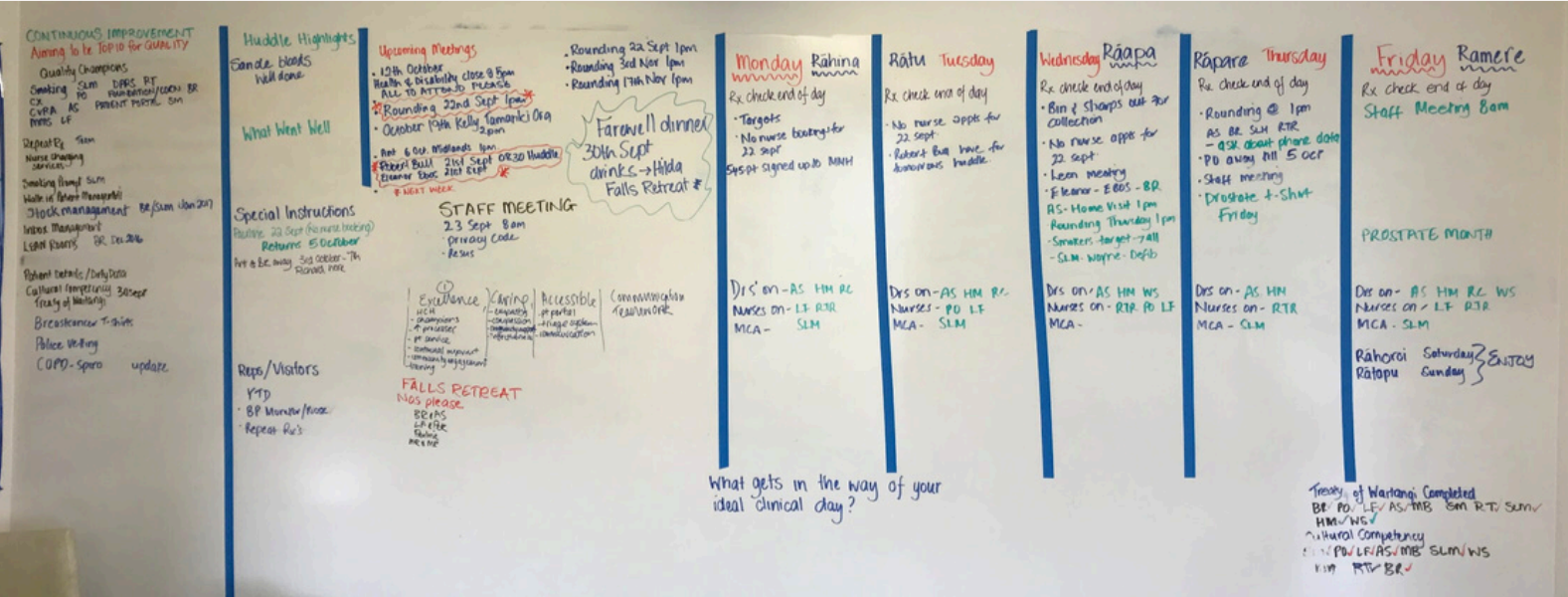
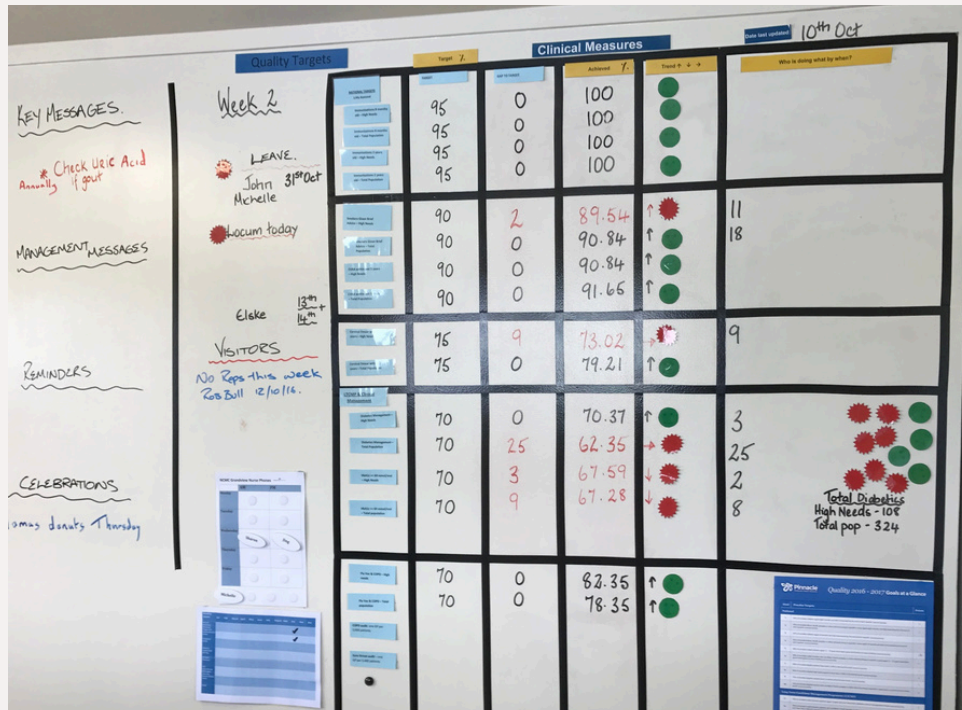
Imagine how many questions this part of the team board answers throughout the workday.

START	ETC	EST. HRS	CUR. HRS	1	2	3	4	5	6	7	8	9	COM
11/05	*	*	7					5					
01/05	—	—	0					4					Fethering Cont
01/05	19/05	15	6.5						6				
28/03	—	—	0			3							Mark-back Thurs
23/05	24/05	8	3					5					Book in-Sharon
27/03	*	9	2.5					4					Drawings done
26/04	18/05	18	13					3					Install cylinder & roof
12/05	17/05	10	2.5					4					W.P. Window
11/05	29/05	20	9					5					TO BE COMPLE

in Health Care

This team board tracks the national targets versus actual results for specific interventions in a GP practice.

The board uses great visual management that makes it immediately clear where the biggest opportunity for improvement is.



This board is designed to ensure the team stays on top of the weekly schedule. They've also included a dedicated space for Continuous Improvement activities, as well as areas for other key communications, such as where the farewell drinks will be held. (I know that I said a few pages back that 'a team board isn't a notice board', but hey- if it works for you and your team, go ahead.)

Get creative with **TEAM BOARDS**



Top: Team Values

Right: Weekly Schedule

Far Left: Strategic Plan

Middle Coloured

Rows: Weekly actions that aligned with strategic focus areas.

Middle Right:

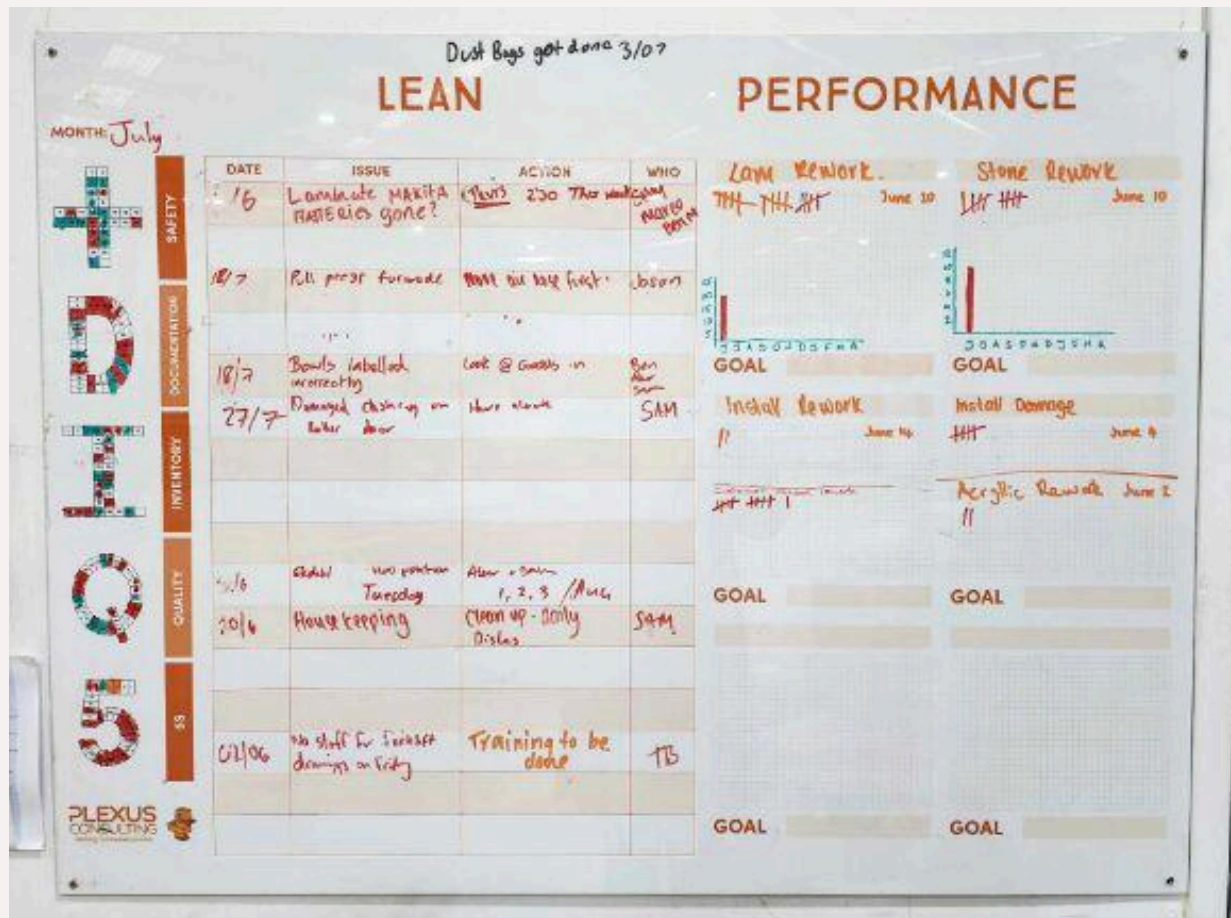
Organisational goals, Parking Lot & Student achievement data.

This is from back in Kate's days in education. Her and her team met for 15 minutes every morning before school around this board. They were VERY resistant to the idea of an extra hour+ of meetings per/week initially, but once they experience the value of creating time to get on the same page each day, they were 100% on board. They kept this discipline going for years.

This team have used a Kanban approach where their little car-shaped task cards move from to-do > doing > done. It's cute, it's organised, it's crystal clear where the team are with their continuous improvement priorities.



My favourite ever TEAM BOARD



Left: Quality Indicators broken into days of the month. Green = everything went according to plan yesterday. Red = We didn't hit our standard.

Right: Performance Metrics. These tallies & graphs are keeping track of waste throughout the manufacturing and installation processes of this cabinet company.

Middle: This is where the team look at the data from the left and right of the board and decides what actions they will take to improve in specific areas.

This team board went through many iterations before becoming the go-to info hub you see here. The team started with big sheets of paper, taped out whiteboards, and used digital tools before committing to creating this bespoke ACM board.

HOW TO START ANYTHING:

JUST MAKE IT
EXIST FIRST

YOU CAN MAKE
IT GOOD LATER

Where to start your **TEAM BOARD?**



There are two important steps right out of the gate here:

- Start as simply as you possibly can
- Bring your team with you every step of the way

First things first: have a direct chat with your team. What information and communication do **they** need to get their jobs done well each day? This is critically important. This thing must be co-constructed, or you might struggle to get buy-in from the team.

Once you've gathered those insights, it's time to sketch out some possible layouts. Grab some scrap paper and play around with different ways to present the key information. Test how these layouts would work with your daily stand-up meeting agenda. Make sure you get feedback from your team, so everyone understands what goes where and why.

Next, choose your location. We highly recommend putting the board at the 'Gemba' (that's where the actual work happens), or as close as possible to a spot where people naturally congregate.

Then, when you're liking that way that things are flowing and you've got a hunch that the information that you'll record will provide clarity and value to the team, invest in a whiteboard or an ACM board to draw up your very first version. Don't worry about it being perfect straight away! The flow and format will likely change, so hold off on the permanent markers or tape until you're sure you've got something that truly works for your team.



Continuously Improving Your **TEAM BOARD**

So, your Team Board is up and running: that's a huge step! Now, the key is to make it a natural, essential part of your team's day-to-day work.

Embed It:

Start by making the board central to your daily stand-up meetings. Encourage everyone to understand the information and how to 'read' it. A trial period of 2-3 weeks often works best to tweak the layout as topics bed in and you get good engagement. Once your team feels the board is truly helping them, then you can make info areas permanent.

Top tip: if you're tracking lead measures, always create two spaces for each: one for the live, weekly data, and a second to record month-on-month trends in a simple graph. This provides instant insight and shows progress!

Prioritise Ongoing Evaluation: As a Lean Leader, it's critical to consistently keep an eye on how the team is embracing and using the board. This isn't just a one-off setup; it's a living tool that needs your attention to remain effective.

Here are a few ways to keep track and ensure your board continues to add massive value:

- **Engagement** during daily stand-up meetings: Watch how actively people are interacting with the board, referring to it, and contributing updates.
- The **different handwriting** on the board: The more variety you see in the writing, the more it indicates that multiple team members are actively interacting with and 'owning' the board.
- Staff **feedback**: Regularly ask your team directly: "Is this board still helping us? What could make it even better?" Their insights are gold for continuous improvement.

FINAL THOUGHTS



Team Boards aren't about sticking notes on a wall; they're about transforming your daily chaos into calm, your frustration into flow, and individual efforts into collective awesomeness. You've got the insights, you've seen the 'why', now it's your turn to find out how a well-designed board can make every workday clearer, more collaborative, and genuinely more enjoyable for your entire team.

Team boards embed a culture of continuous improvement.

They get priorities out to the team so you can reinforce them again & again.

We'd love to support you in designing a snazzy Team Board that perfectly fits your unique business.

We recommend checking out these NZLA resources next:

[Daily Stand Up Meetings](#)

[Skills Matrix](#)

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