

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 <u>www.nzla.nz</u>

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 <u>absolutely</u> 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.

Examples of **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.

UPCOMING JOBS	"JOB#	Carters	12.C	TECH.		STAR	ETC	EST. HRS	CUR. HRS	123	456	789	COMMENTS	1 60						
Carline 1170100 and Citada	610930		V	David	Saw Faults	11/05	+		7		5		COLLECTO	- 30	CIAL EVI	ENTS / LEAV	E			
Carters-HZQ490-Seal Cylinder - shaun	610932	K Maize G	V			01/05	-	-	0		4		Fathering Contractors	Josh	day in the	-6 June				
Wel Network 153 Cylinder and booked for 26/051 memored book. 30/05	610549	Diesel Services		Anton	Rexroth		19 (05	15	6.5		6		Shaw 04487767							
		ENP. Dirsel	V	Quote	CAT 3P.0365	28/03			0	З			Mark-back Thurs 1165	- main		10 July-	leave			
	610667	Wel. N.		Josh	EAQ90- Crane /Pipe		24/09	8	3		5	0.0	BOOK In-Sharon	Antor	-9 June					
Pot - David order P/R values,	610482 610835	Hella		David		27/03		9	2.5		4		Drawings done		n-13 June					
Pot - Dawid order File Davides,		Waini Livestock		Anbon	Cylinder		18/05		13		5		Install adjudes & school electrical Gualts	Tepento						
	611076	Schick	V	Arton	Pump		17/05		2.9		4		W.P. Windost ETANNA OF 22/05							
	610279	Kiwi Hire		Anton	Reduction to Travel Molor		20/05		9		5		TO BE COMPLETED 20 HAY!							
	611142	K. Maize	1	*	Repair norseal cylinders		23105	5	-	1				_						
	610936	POT	V	David	TUB		25/05	-	8		5	_	Change out PR value							
	611156	AD Equip	V	Anton	PUMP SH460HD-38	220				1				Public	Public Holidays					
	610981	Taranaki Civil	V	David	LXTO PUMP	05/05	. *	18 00	7.5	-	45		Warranky under G.P. 26/05/177	5 June - Queens b-day (Honday)						
READY FOR INVOICING	611157	WEL N/SEESS	V				29/05	12-15	-	3			Estimate for reniar	-						
GIOSH-Resmans	BIIISF	NUMAX	-	Nathan	Travel Notor	17 65	*	*		-	4		Estimose for termin	-						
GIUSH-RESMANS	611150	Riverles Parel	V	David	FIX FOOL PUMP	22/05			1000	2		-	To arrive Mordey 22/05 Andrew 0272479741							
GIII40-LED H GIII37-Buce Bolt		Davis Lowith		×	Travel Motor Hela		-		-	2	5		Remove Contra print & outwork to Auto systemy	F	IRE PUI	MPS - GRAHAN	1			
611081-Performance Deser	611147		V	Nakhan	Crane Repair	13/05	23/05	10	29	-	5		Call in		Complete	DESCRIPTION	DAT			
611075- Sherwood. B	611138	Sala Paman	V	Ant /David	LDIDOD - Dumper	10/05	26/05	50-60	29	-	5	1	Kensten Excevator- AE EZ-Ze or 21/5-2/6	108 #	COSICHER					
	6/1019	Tom Wakelin	-	Stene	Repar Pilet Housing	6		60.4.8		3				1		(and (and contract)	23 05			
		Chas Walklin	V	Steve	Trecher		26/05			3						6V53 (0182 57343)	1000			
	GIILS	NES MAR	-	ANTON	Forklift	22 05	1000		2.5		5		David going back-bigger spring reg - frazilit	610921	Wormald	Pertins ENH Manifold				
	A State of the sta			David		11/05	×	*	2.5		-3-			610938		Contraction of the	100			
	611070	Motor + Mach.		Datio	TT DOT O	1.000						++			00176	ILH NORNA ROUSE	Anybin			
	-		1			1.000										IMPELLER	18 1			
6/11/1-6/00 McGuine-B 6/1100-Allan Bull-B														611/02	ZERO FIRE	Report Games INSTONS				
6//100 - HIIBIN BUILT 5	-		-		14 Contraction State									-		primer sale volut-				
ESTIMATES						-								1	1.	Second His Paleia	100			
Distal				12 12 19 19	a set of the second second	-		RIAC COM						-	1					
+ 610549 - Express Diesel				10000000									-		30.000					
	and the second second		-						All the A											
+ 610935- NO - 11- 1- Motors + 610279 - Kiwi Hire- T. Motors							-							_		1				
610 936- POT							-													
			201	-		1 Co								-						
TD JOBS COMPLETED O/T OVER TIME.						1.00.1	18					-		-		the second second				
WERE COMPLETED OFT OVER				1		100.000	18			-				1	-		1111			
10.000			100				12-22	Conserved and					A State of the second second	-						
In				10000		-			and the second		0	-								
	A TRACK STATE			1.		a state and														
		and the second second																		
		and the second	and the second																	
	The second																			

Progress

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.

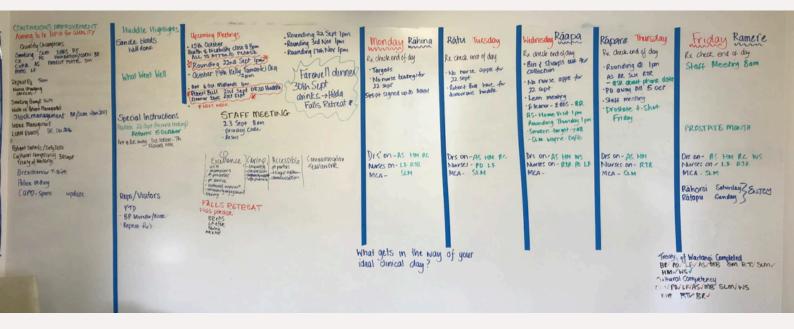
START	ETC	EST. HRS	CUR. HRS I	12	3	4	5	6	7	8	9	CO
11/05	+	*	7	-	-		5			-	-	
01/05	_	-	0	-		4						Fothering Cont
01/05	19 105	15	6.5			1.1		6				S.M.
28/03	-	-	0		3							Mark-back Thurs
23.105	24/05	8	3				5					BOOK In-Sharon
27/03	×	9	2.5			4						Drawings done
26/04	18/05	18	13				3		8.0			Install culinder + Kea
12/05	17/05	10	2.5			4						W.P. Windost
11/05	and the second division of the second divisio	30	a				5					TO BE COMPLET

TEAM BOARDS 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.

	Quality Targets		Tangat 7.	Clin	ical Measures	Treed 9 + +	Law law leader and light of the OCT
KEY MESSAGES.	Week 2 LEANE. John 31stoct	Nina and Anarowani Anarowa	95 95 95 95	000000000000000000000000000000000000000	100 100 100 100	••••	
MANAGEMENT MESSAGES	Alcreile Hocum taday Elske 13th +	Minimum Minimu	90 90 90 90	2 0 0	89.54 90.84 90.84 91.66		 8
REMINDERS	VISITORS		75 75	9 0	73.02 79.21	, 1) 1 @	9
CELEBRATIONS Jomas density Threaday	Cobil 2/014.	ERA A Start Brand	70 70 70 70	0 25 3 9	70.37 62.35 67.59 67.28		3 25 2 8 High Needs - 104 16da pap - 324
	2000 2000 2000 2000 2000	Anna an Anna an Anna an Anna an Anna an Anna an Anna an	70 70	0 0	82.35 78.35	↑ ● ↑ ●	



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 carshaped 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



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.

GET IN TOUCH:

Rob: rob@nzla.nz 021 068 6072

Kate: kate@nzla.nz 021 025 026 84

We recommend checking out these NZLA resources next:

Daily Stand Up Meetings

<u>Skills Matrix</u>