

Improvement Cymru Academy Toolkit Guide



Visual Management

Introduction

Visual Management is a way of communicating key information, instructions, and status in a visual way that can be easily understood without much thought by anyone. It is used through signs, markings, information displays and labels. It is a simple and highly effective way of communicating what should happen and what is happening in the workplace without having words or interruptions. The goal of Visual Management is to give you as much information as possible in a short space of time. Visual management closely aligns with lean concepts of 'Genchi Genbutsu' which means going to the process and see what is happening and '5S' which is based on organising workspaces to be more effective so that work can be done efficiently and safely (See our [5S Toolkit Guide here](#) for more information). You see visual management every day in your personal lives and through work. Some example of visual management techniques used are:

- **Colour coding**

You could use this to communicate information to differentiate between different resources, or information or to communicate status. A traffic light system is a form of colour coding visual management. Colour coding is a national standard for healthcare in the UK and healthcare environments should follow the Department of Health's HTM 07-01 Safe Management of Healthcare Waste Memorandum. Here are some examples of where colour coding is used in healthcare: In medical notes, applied to waste disposal, linen bags (green means unsoiled, red is soiled) and is sometimes used on floor markings to inform patients of which colour line will lead them to the correct room.

- **Andon Lights**

Andon comes from the Japanese word 'lantern'. These systems provide notification to others involved in the process of a problem. It works when an issue is detected, a member of the team can immediately notify support staff so that the issue can be managed. In healthcare, you will see Andon lights above clinic rooms, toilets, and in wards, so that if an alarm has been triggered and a member of staff or a patient needs help then you can clearly see where the alarm is coming from. In some hospitals, this information is fed

into a central board which shows which room the emergency is in. The fire alarm systems within a hospital also uses an Andon circuit board which tells you where the fire is.

- **Information Displays**

Information displays are used to display information about processes, safety, patients, and performance. This could be in the form of dashboards, boards, graphs, and posters. Examples of this in healthcare are radiation exposure signs, ward boards displaying information about patients, posters for patients with limited fluid intake, wet floor signs and signs for personal protective equipment (PPE) for infection control.

Rationale

Visual Management is used to share information, standards of work, highlight problems, and prevent problems from reoccurring. It allows teams to be able to go and see the work (Genchi Genbutsu) (see our [Gemba Toolkit Guide here](#) for more information), recognise flow, assess levels of stock, identify defects, detect any variation within the process and improve quality and safety. There are many benefits to Visual Management:

- Makes the process easily understood by looking at it
- Allows you to identify problems and waste so they can be investigated and resolved quickly.
- Allows for transparent and measurable performance and progress within teams which can be monitored and improved over time.
- Allows more effective communication and collaboration so that a culture of teamwork and continuous improvement can be adopted.

Background

Visual management has been rooted from the Toyota Production System and Lean for quality improvement, however visual management e.g., traffic light system, highway code etc... has been around since before Lean. Visual management is influenced by the principles of human factors, engineering, and psychology, which recognises the importance of visual perception in human cognition for improving

quality and safety. Visual Management has been adopted by many industries over the years including education, technology, healthcare, and project management.

When to use Visual Management

Visual management is a powerful tool that can increase quality and safety in the workplace. You would use Visual Management if you wanted to communicate information to make a situation easily understood and ensure that standards and best practises are consistent and clear so they can be followed and maintained.

How to use the Visual Management

You can create a visual to communicate information, instruction, and status by testing your improvement solutions using small cycles of change i.e. Plan, Do, Study, Act (PDSA) cycle or Plan, Do, Check, Act (PDCA) which is the term used in Lean methodology. These are also referred to as Plan, Do, Check, adjust cycles in some literature (See our Introduction to [Lean Toolkit guide here](#) for more information).

Step One

What are you trying to accomplish by setting up a new visual management? You will need to identify and set scope boundaries for the visual management system you want to create. What do you want the information to communicate? Who is the intended audience? Where will it be displayed? Why is this information needed? How will you keep it up to date? How will you know that impact it will have? Will you need to collect data to measure the impact? Engage with colleagues who have a vested interest in making an improvement.

Step Two

Next, you will need to choose the most appropriate visual management tools for your project. There are many forms of visual management such as signs, markings, information displays, Andon systems etc... You could also think about colours, symbols, images, graphs etc... that you may want to display.

Step Three

You will need to design and test your visual management system. You will need to monitor the impact the new visual management system is having. Collecting data will help you to determine if your solution has been successful.

Step Four

Study the results of your test; you will need to look at what impact the visual management has had - has it been positive, negative, or made no impact? For example, if you were to put handwashing signs around the ward or department would you want to monitor the rate of infections to see if they have decreased. It would also be a good opportunity to get feedback from staff and suggestions for improvement.

Step Five

You will need to decide whether you want to continue with the visual management system you have designed and test it over a few more cycles to ensure sustainability, you may decide that you want to adapt it slightly based on the results and feedback you obtained from the PDSA cycle, or you may want to abandon the idea and go back to the drawing board.

Step Six

Once you have decided that you want to adopt your solution of visual management, you will need to embed this into current practice by standardising ways of working, updating documentation, providing staff training if needed, and looking at the social dimension of this change to ensure a culture of sustainability. See our [Implementation Toolkit Guide here](#) for more information.

Step Seven

Once, fully embedded into practice, you could showcase your improvement with other areas and organisations to see if this innovation would benefit them. See our [Scale and Spread toolkit guide here](#) for more information.

What next?

Is there an area of your work that you think would benefit from visual management? If so, have a discussion within your teams and collect some data on why you think this type of intervention is needed.

Helpful tips

When thinking about creating a visual management system you must include all members of your team that will be using it. This will help with motivation and engagement and helps to understand why this is needed. Make sure that the visual management system is simple, clear, consistent, and avoids clutter or confusion.

Additional Resources

If you are interested in learning more about how improvement practices can benefit your workplace, we offer a range of training courses. Visit our website for more information. <https://phw.nhs.wales/services-and-teams/improvement-cymru/improvement-cymru-academy/> or email us improvementcymruacademy@wales.nhs.uk to find about the improvement courses we offer.

Further reading

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