Institute for Healthcare Improvement

IHI TOOL

# Visual Management Board



This tool was originally developed through a partnership with the HRET and the AHRQ Safety Program for Ambulatory Surgery.

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# What Is a Visual Management Board?

A visual management board is used as a key communication tool that provides at-a-glance information about process performance, both quantitative and qualitative data.

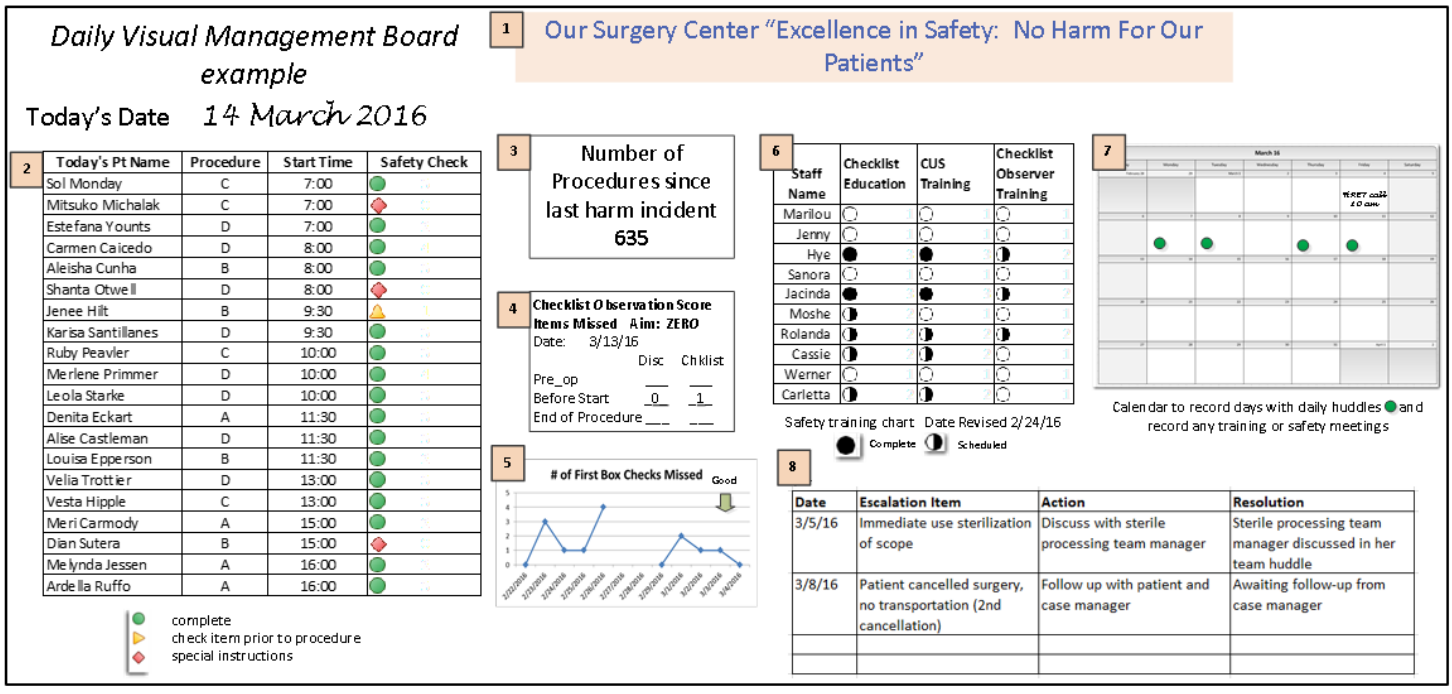
To sustain high performance in health care quality and safety, staff on the clinical unit need current information about process performance to coordinate and guide their daily work. Visual management boards, displayed publicly or semi-publicly, show key unit-level process indicators that align with system-wide strategic goals, such as improving quality and safety or lowering costs of care.

Data displayed on the board help teams track key metrics following an improvement project — to monitor performance over time and ensure that the new process is achieving desired results — and provide updates on ongoing improvement projects. In addition to key metrics, teams may find it useful to also display standard work (such as checklists) on the board.

These visual data displays are typically accompanied by a daily communication process, such as a daily huddle, to ensure that all staff understand the current context, issues, problems, and priorities for their work. The standard huddle agenda can also be displayed on the visual management board.

Although visual management boards can take many forms — dry-erase boards, paper taped to the wall, or a combination of the two — they should be easy to update, add notes to, and change.

**Example Visual Management Board: Safety in an Outpatient Surgery Center**



The example visual management board has the following key features, noted with corresponding numbers on the figure:

1. The board displays data for key metrics that are connected to the organization's strategy and/or vision statement: "Excellence in Safety: No Harm for Our Patients."
2. A surgical schedule shows patients to be seen that day, with a "stop light" (red, yellow, green) system to flag safety concerns.
3. The team tracks the total number of procedures without harm on a daily basis.
4. The team tracks use of the surgical safety checklist (part of their standard work) as observed by staff on a routine basis (e.g., daily).
5. A run chart tracks data over time for checklist compliance (i.e., the total number of checklist items missed).
6. Staff safety skills training is tracked in a table, clearly indicating completed and scheduled training for all team members.
7. A calendar shows the number of days when daily huddles were held, as well as safety meetings, training, and special events that occurred.
8. This team has formalized procedures for escalating problems to senior managers or other relevant staff when unable to solve them locally. During the daily huddle, the team identifies escalation items and tracks follow-up actions and resolutions on the board.

# Tips for Visual Management Boards

- Staff may be resistant to displaying performance data in public, especially if results are not yet meeting targets. To gain buy in, you may start by implementing a visual management board with senior leaders, to demonstrate support and create a culture where it's safe to show that improvement is needed. In addition, you may consider engaging team members in determining the metrics that get displayed on the board and keeping the board updated.
- The aim of the visual management board is to help the unit-level team manage quality and safety on a daily basis by displaying key performance data at a glance. To foster a culture of quality and safety, it's essential that the board is not a top-down management tool for judgment or blame on performance. The unit-level team has ownership of the board and determines the best way to use this tool to guide their daily work in alignment with overall organizational goals.
- Choose to focus on just a few items to start. Consider including items the team can use immediately, for example, safety issues that the team can work to improve or safety practices you want to reinforce for the team. Keep in mind that you'll want to choose items that can be updated with some frequency, and that you're ready to make visible to all staff.
- Other items that might be included on a visual management board: improvement project charters with documented PDSA cycles and related run charts; tools and analyses of problems such as fishbone diagrams or process maps; and examples of standard work such as checklists or care protocols.
- When determining where to display your team's visual management board, choose a space that is convenient for a stand-up daily huddle, even if the team is not yet conducting huddles.

# Implement a Visual Management Board Using PDSA Cycles

The following suggested Plan-Do-Study-Act (PDSA) cycles can help your team implement a visual management board as part of your improvement work.

| PDSA Cycle # | What question(s) are you trying to answer? | Plan | Do | Study | Act |
|---|---|---|---|---|---|
| 1 | Can we draft a visual management board for one day? | Using the example board in this tool for reference, identify items for your team's board<br><br>To help determine what information to display on the board, ask team members: "What do we need to know about the performance of our work unit every day?"<br><br>Locate wall space where you can display the draft board | Create the draft visual management board | Ask team members for feedback:<br><br>Were the board items easy to update?<br><br>Did the location work well? | Identify areas for improvement and incorporate changes for the next test |
| 2 | Can we use the draft visual management board in a daily huddle for one day? | Discuss at least one item on the visual board in the huddle<br><br>Consider including an item on your board that lists patients and procedures for the day and patient safety status | Update the board and conduct the daily huddle | Ask team members for feedback:<br><br>What worked well, and what could be improved? | Identify areas for improvement and incorporate changes for the next test |
| 3 | Can we use the management board in a daily huddle and update it daily for a whole week? | Carve out time to update the board and ensure the team knows the huddle protocol, including when to meet | Update the board and conduct the daily huddles | Did the team conduct huddles every day?<br><br>Did the board and huddle work well together?<br><br>Were items on the board easy to update?<br><br>Are items missing or not useful? | Adapt the items on the board and practices as needed, and continue the practice on a daily basis |

# Additional Resources


- Fausz A. Visual Management: What Makes It Tick? Lean Healthcare Exchange.
- Howey L. Visual Management System: Leadership Support for the Front Line. Presentation at the Saskatchewan Health Care Quality Summit; 2014.
- Institute for Healthcare Improvement. Daily Huddles.
- Kaiser Permanente Colorado's Medicaid Enrollment Project Team. Applying the 5S Tool to Healthcare Service. America Society for Quality.
- Scoville R, Little K, Rakover J, Luther K, Mate K. *Sustaining Improvement*. IHI White Paper. Cambridge, MA: Institute for Healthcare Improvement; 2016.