

*The Visualization of Purpose:
Quickening the Pace of Executive Achievement
Through the Visualization of Purpose*

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Quickening the Pace of Executive Achievement Through The Visualization of Purpose

By Takashi Tanaka and Sharon Tanner

Executives today, faced with competing business demands, are frequently tasked with accomplishing a multiplicity of targets imposed by various enterprise leaders. These targets may be stated in general, non-quantified terms, or they may have definitive measures that are not accurately assessed to ensure they are achievable. Visualization is one tool that can help the executive clarify expectations of the team, improving communication and enhancing cross-team collaboration. Making knowledge work visible fosters continuous improvement and strategic planning. By reducing the “clutter” from a multiplicity of goals into the few clear, focus targets for the team, the executive can empower team members and drive execution and accountability.

Recent “white papers” from QV System, Inc., have addressed the application of the Toyota Management System (TMS) to western corporations.ⁱ In a 2007 paper “Quickening the Pace of New Product Development,” Takashi

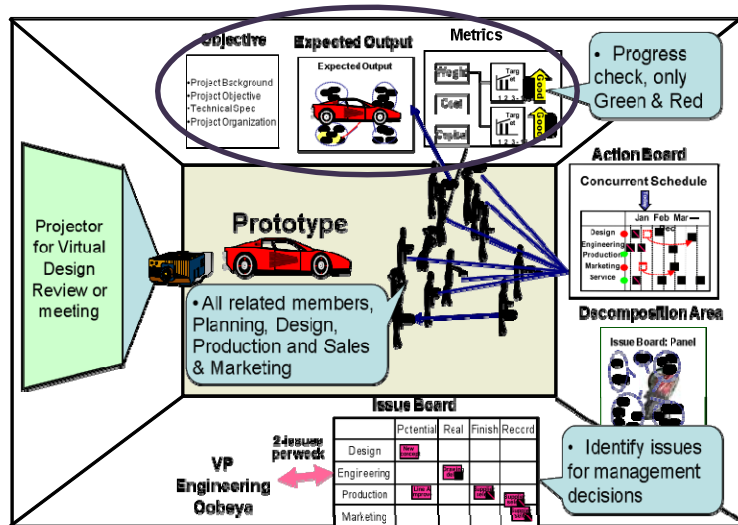


Figure 1, Oobeya (with Quality Portion Highlighted)

Tanaka presented an overview of the TMS. Toshi Horikiri, et.al, introduced greater detail on the oobeya (Japanese for “big room”) in the 2008 paper “Oobeya – Next Generation of Fast in Product Development.” The application of the TMS methodology to the western executive, including those outside of product development, was developed by Tanaka, et.al., in the 2010 paper “Lean for Leaders:

Toyota Management System in the Executive

Office.” While oobeya is but one of the many TMS tools, it is a good starting point for organizations seeking to change their working culture, bringing greater efficiency, productivity, and flow to their work. Oobeya uses clear objectives and visualization of the work to foster collaboration and enhance quick problem solving. The defined targets become the “engine” which focuses the teams and energizes their drive toward common goals. Individual teams break down the higher level targets to ones that are meaningful for their own work statement, in an activity called target decomposition.

The oval on Figure 1 highlights the starting point for the flow within the oobeya. The visualization of the organizational purpose is where it all begins. This paper will highlight that “purpose portion” of the oobeya and show its application in Product Development (PD) environment and beyond. Within PD, a project leader uses a single A4 sheet of paper to depict visually the overall objectives of the new product. Then, each major department or sub-organization within the project breaks down that vision or purpose into a meaningful structure for their particular components or application, again using a single sheet of paper. These depictions must include the planned improvements in both products and processes that will achieve the project’s overall objectives. These individual depictions are called “barashi.” Loosely defined, barashi means “the visualization of purpose.” (In Japanese, the word more closely means “the elaboration of scenario.”) Teams must determine and visualize their primary solution by which they will advance the overall effort to achieve the project objectives. Ideally, they will also include alternate scenarios to capture secondary approaches to be considered if the primary design was unsuccessful.

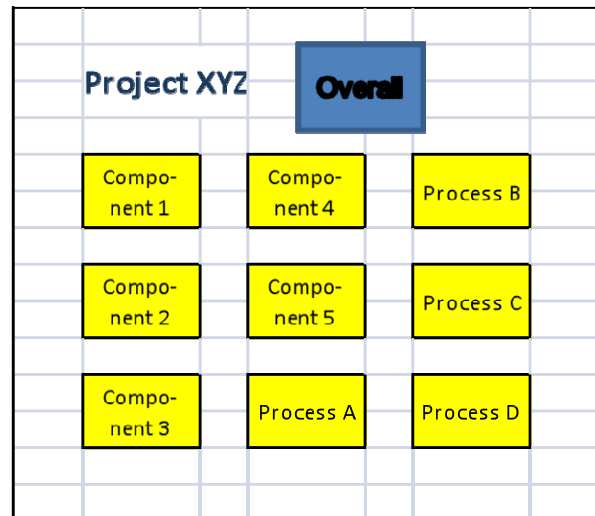


Figure 2, Depiction of PD Barashi

The barashi serves three primary purposes:

- The team benefits from the structured, disciplined process of creating the barashi. By doing so, they ensure they have understood the policy deployment (the direction set by the project executives) and have created a robust plan to achieve it.
- The barashi enhances communication among the overall project team. Each team leader understands the approach being used by all other leaders, enabling greater collaboration.
- The team’s barashi becomes their “elevator speech,” made powerful through its focus on targets and metrics. Through the barashi, leaders and team members can explain the critical points of their contributions within a short (3 minute) time span.

Perhaps the best way to understand barashi is to review an example. In 2006, Toyota Motor Company’s Vice President of Engineering set aggressive targets for quality improvements and cost reduction, covering his whole organization, an integrated system comprised of Technology, Production and Supply, and Sales and Marketing.

The executive leading the Human Resources (HR) department supporting this large integrated organization then created his barashi to depict how his team would contribute to the enterprise goals. Figure 3 represents that visualization. The HR executive decomposed the vice president’s objectives into meaningful concepts in his own area of expertise. HR could contribute by improving capacity in global operations through the use of certified trainers, promoting self-reliance as the means of achieving quality improvements and cost reduction. Thus, their mission is integrally linked to the Vice President’s objectives and targets, and their contributions are measurable through metrics (note the metrics in the upper right-hand corner).

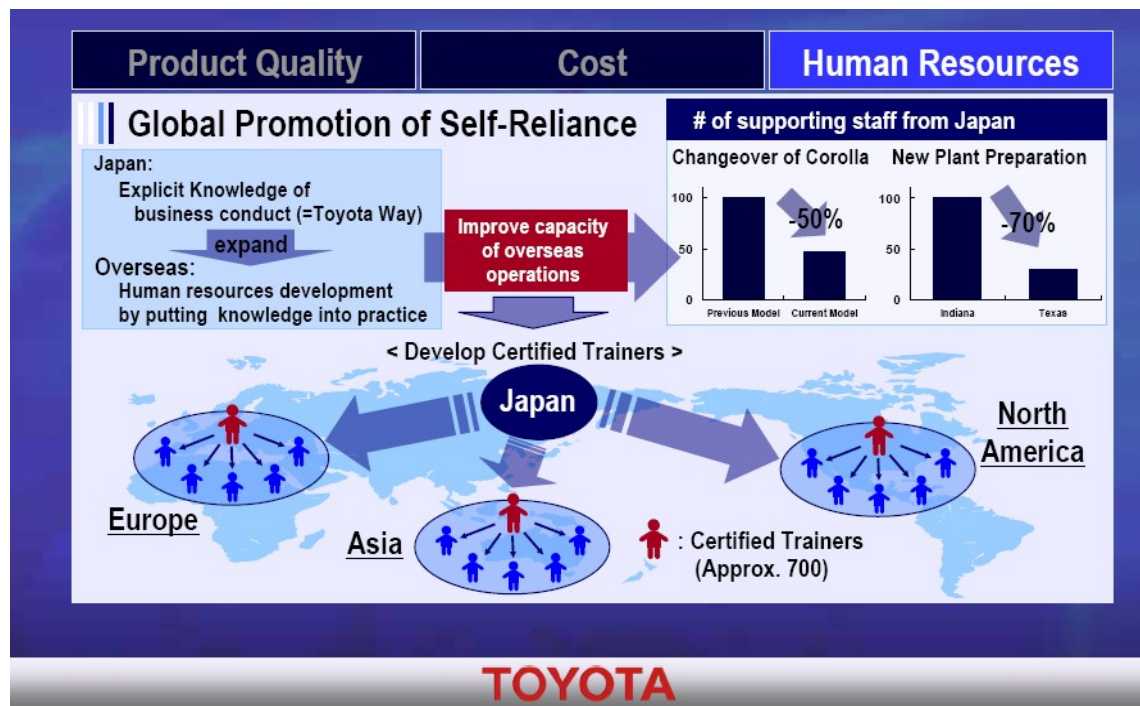


Figure 3, HR Barashi

Looking at a completed barashi can be deceiving because it appears simple and logical. To improve product quality and reduce costs, the global enterprise must understand “the Toyota Way” which has been so successful in the plants in Japan. HR identifies its contribution to accomplishing the targeted capacity improvement in the overseas operations—developing in-country certified trainers, who will then serve as the critical link between operations personnel overseas and the Toyota methods. The HR executive also set challenging but realistic goals for cost reductions by reducing the required number of support staff from Japan (up to 70% for a new plant!). Clearly, the barashi visualizes only the key points of this concept; HR would also have developed specific, detailed plans for implementing this new approach.

Developing your own barashi might seem like an impossible task at first. Many Westerners are accustomed to using extensive presentations to explain their current situation and to communicate their plans for the year. These presentations are often lengthy, sometimes exceeding 20 slides and requiring detailed explanations. An effective barashi cannot be created by simply reducing an existing presentation to a collection of thumbnails, coexisting on a single page! Instead, executives must strive to identify and visualize their essential contributions toward the overall objectives of the project or organization. This can be accomplished by concentrating on the value their team brings to the overall organization or enterprise.

One team within a client corporation was tasked with changing the working culture within the PD group by implementing TMS. Their barashi development is documented next, including a modified version of the final visualization. The new product team had set aggressive targets both for product improvements and process improvements. Fourteen executives comprised the leadership team, with the LeanLeader as one participant. To visualize her scenario, the Lean Leader had to focus on the *project* goals to show how she could impact the bottom line—product and process improvements. Her first attempt at a barashi centered on what she could control, visualizing and measuring the process of implementing TMS; she had ignored the project targets altogether! Her modified version still visualized the phased TMS implementation, but it began with the project targets and measured success based on achieving those overall project targets.

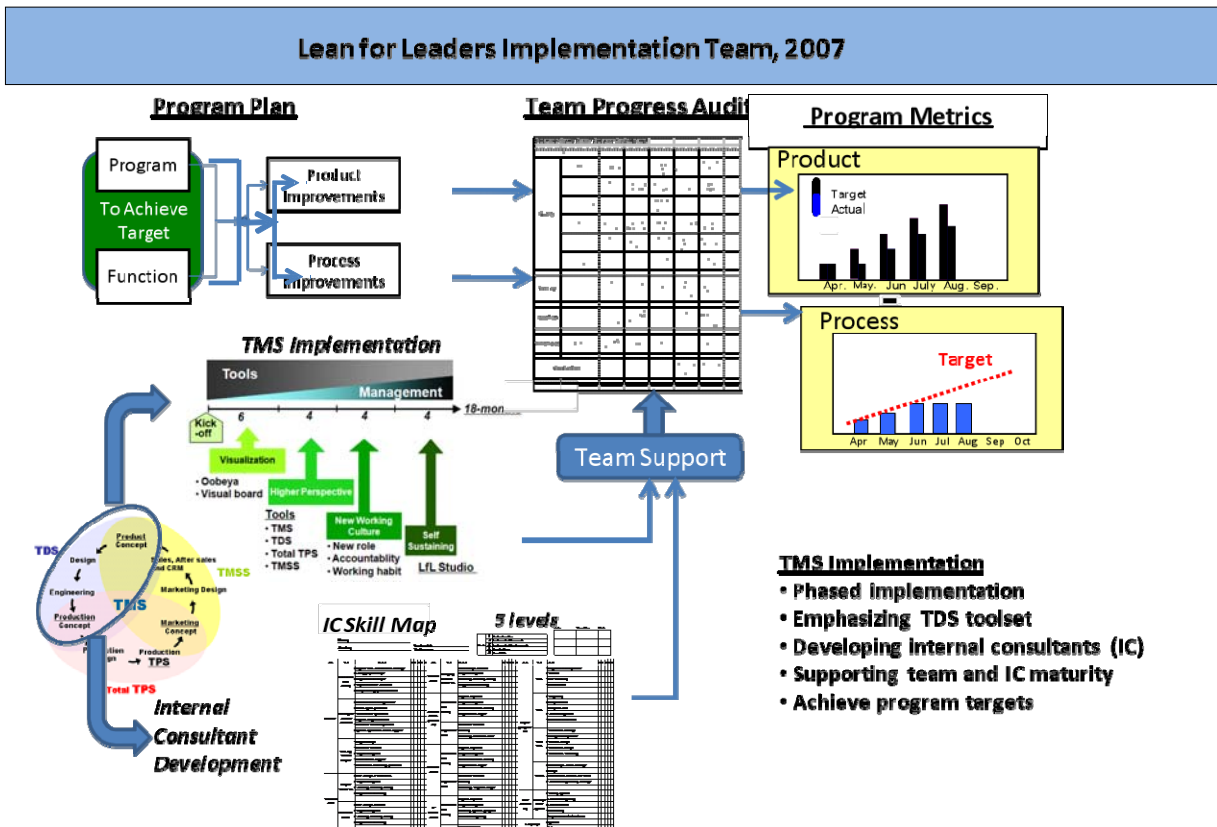


Figure 4, Lean Team Barashi

The thrust of the work was to develop mature teams and mature internal consultants so that the Toyota Development System (the key portion of the TMS system for PD) became a natural part of the company working culture. She needed to overcome the tendency to only measure what she could control; instead, she focused on how her team was contributing to the organizational targets.

General guidelines for creating a barashi are helpful as reminders. These include the following:

- Ensure you understand company policy and targets so that you can accurately reflect your contribution to them.
- Review the project targets to ensure your target decomposition is in good alignment with them.
- Include a visual depiction of your effort to facilitate clear communication with all team members and project leaders.
- Include your team's long-term objective in addition annual targets.
- Show your current status and metrics, if at all possible.
- Content is critical, while format is flexible.

A Visual Board, or Barashi Board, can provide an effective, disciplined approach to creating a single-page barashi, serving as the preparation step. In fact, outside of Product Development, in the "sustaining engineering" portion of the company, the Barashi Board is the tool most often used as the "visualization of purpose," without reducing that visualization to the single page view. The Barashi Board can be applied to a project or to an organization. It is usually formed by capturing data on a number of A4 pages and attaching them to a portable 4'x3' board.

Twelve elements make up the Barashi Board, as shown in Figure 5. A structured approach to creating the board begins with the collection of current data, followed by a time of deep, individual reflection for the leader. Next, the leader creates a draft of each element of the board, in a methodical, step-by-step manner. Allow each element inform the creation of the next element, avoiding the tendency to switch from one element to another in a random format.

If your team or organization does not have a defined vision or mission statement, creating it will become your first task. Your vision forms the basis of the Theme, which is included at the top of the Barashi Board and sets the tone and direction for all other elements on the board. It should be unifying for the organization and well integrated into the higher-level, enterprise mission so that all targets are linked. In the ideal, the Theme will inspire the team.

Once the Theme is identified, the Background becomes the focus. Various data make up the Background, answering the question "Why must we strive toward the theme?" Capture the data in a brief manner, including items such as the current status or major issues to overcome.

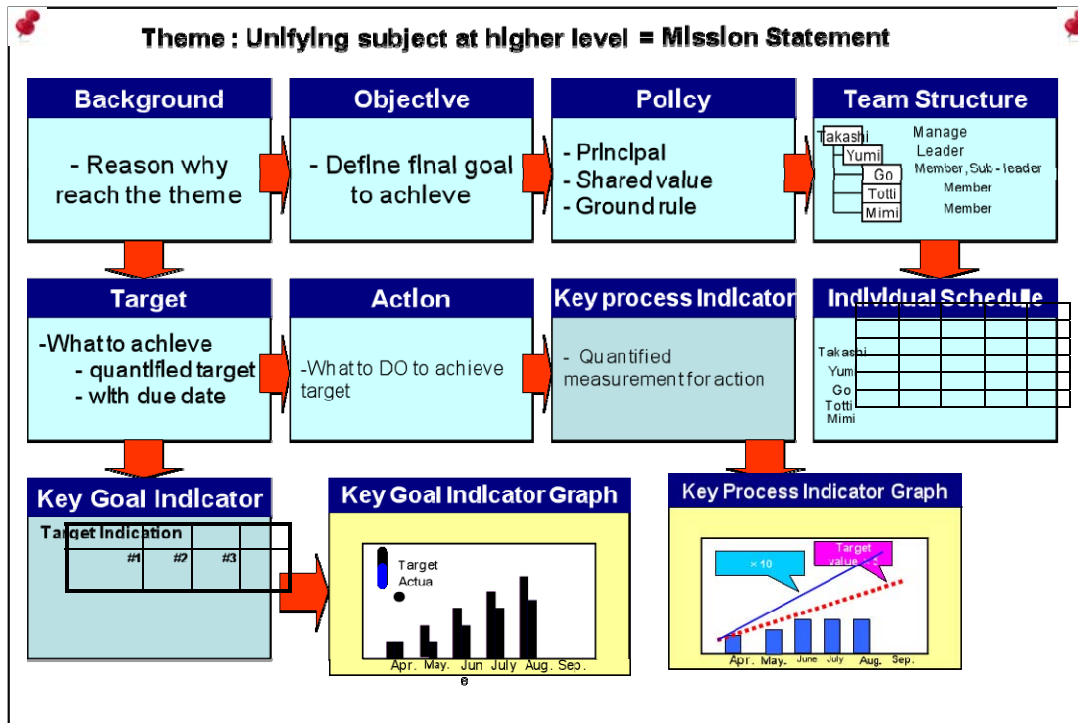


Figure 5, Barashi Board with Definitions

Next, address the Objective, or the long-term goal for your organization. This five- to ten-year look-ahead must be aligned with the enterprise mission because it determines what you want your team to achieve in that time frame. Your single-year targets (determined later) will move the team toward the long-term Objective. The Objective will fall into one or more categories: Quality, Cost, Delivery, and Service.

With the Theme, Background, and Objective determined, the next step is to consider the Policy statements. These include foundational principles accepted within the group, the expectations of leadership, ground rules for operations among the team, and shared values the team holds in common. For example, within an oobeya environment, a shared value should always be "A commitment made is a commitment kept."

The final element on the top row of the Barashi Board is the Team Structure. This differs from an organizational chart. Graphically depict what you need to successfully drive the project. Team members may come from various departments, contributing on either a full-time or part-time basis. Use the Team Structure to clarify roles and identify leadership responsibilities, ensuring each sub-team has a team leader. This graphic depicts the *team* structure, versus a hierarchical or managerial structure.

You are now prepared to tackle this year's Targets (second row of the Barashi Board). Limit the number of targets to three (ideally), with five as the maximum. Too many targets dilute the focus of your team and degrade the likelihood of their achievement. Targets (or Goals) should state specifically what the team is to achieve, expressed in a measurable, quantifiable manner, with a due date. Continue your focus on Targets by determining your means of measuring results. The Key Goal Indicator (KGI) and the KGI Graph on the third row provide the measure that allows the team to know instantly whether they are moving effectively toward the goal, quantifying their results as a function of time. The KGI Graph represents the data in an easy-to-understand graphic, ideally presenting both the target results with respect to time and the actual results. Initially, a rough sketch of the proposed graph is all that is required.

With the Target clearly defined, together with the KGI, you can consider *how* your team will achieve the target—what major actions or activities will be required to achieve the desired result. Clarity in the Action plan will enhance collaboration across the team. Just as the Target (or Goal) had a Key Goal Indicator, so each Action (or Process) will have a Key Process Indicator (KPI) and a KPI Graph. If the KPI Graph is green (showing success) while the KGI Graph is not, you know that your Action Plan was insufficient and must be revised.

The final step in creating the Barashi Board is to break down the Action plan according to the Team Structure, creating the Individual Schedule so all team members understand their responsibilities. The creation of the Board, however, is not the end of the process. This is a "living" board, updated and changed on an on-going basis, kept fresh with current metrics and through changes that arise from the team's continuous PDCA cycles.

The Barashi Board visualizes the executive's contribution to the enterprise, aiding upward communication and cross-team collaboration. At the same time, it clarifies the executive's expectations of the team, setting measurable targets for this year that move the team toward the long-term objectives.

As noted earlier, the Barashi Board can either be the tool used by the team for visual management or it can be a stepping stone to the creation of a single page barashi, frequently used within the Product Development environment where many teams are working concurrently toward the new product targets. Whichever tool is used, the executive will find significant advantages to making strategic plans and actions visible:

- The team is empowered.
- Accountability is enhanced.
- Quick problem solving becomes the norm.
- Waste is eliminated.
- Continuous improvement results.

Visualization, then, becomes a means to quickening achievement for the executive.

ⁱ "Quickening the Pace of new product Development," © 2007, QV System, Inc.; "Oobeya – Next Generation of Fast in Product Development," © 2008, QV System, Inc.; "Lead for Leaders: Toyota Management System in the Executive Office," © 2010, QV System, Inc.

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