

Operations – Lean Strategy

SBE Carcavelos, 10th April 2025

Francisco Vasconcelos, Senior Principal, Kaizen Institute

OUR
MISSION...



善

ZEN

=

改善

KAIZEN™

CONTINUOUS
IMPROVEMENT

+

改

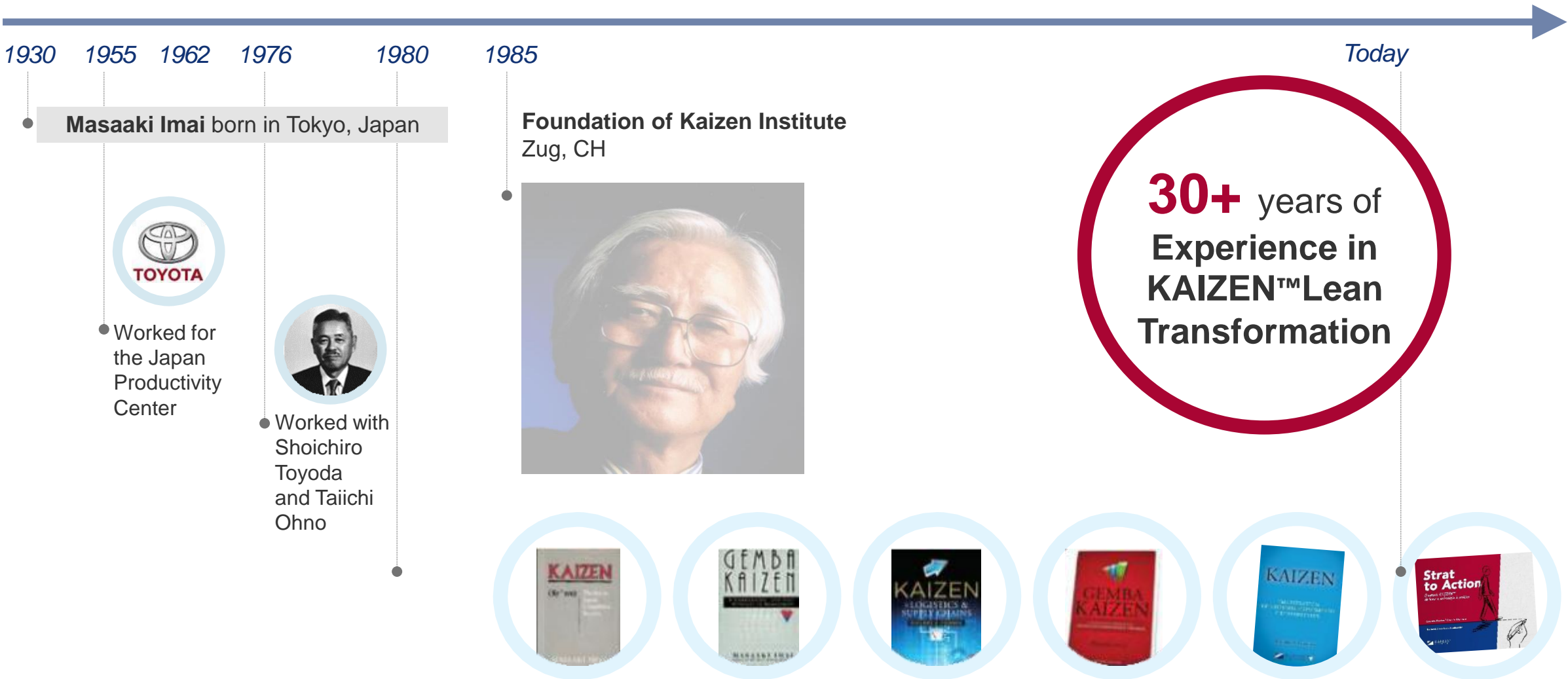
KAI

BETTER

-

Everyone!
Every day!
Everywhere!

CHANGE



Kaizen Institute Published Books - Masaaki Imai, Euclides Coimbra & Alberto Bastos

WE DELIVER VALUE
AND RESULTS, THROUGH OUR
CONSULTING AND TRAINING SERVICES

Founded in **1985**

+700
People

+45
Sectors

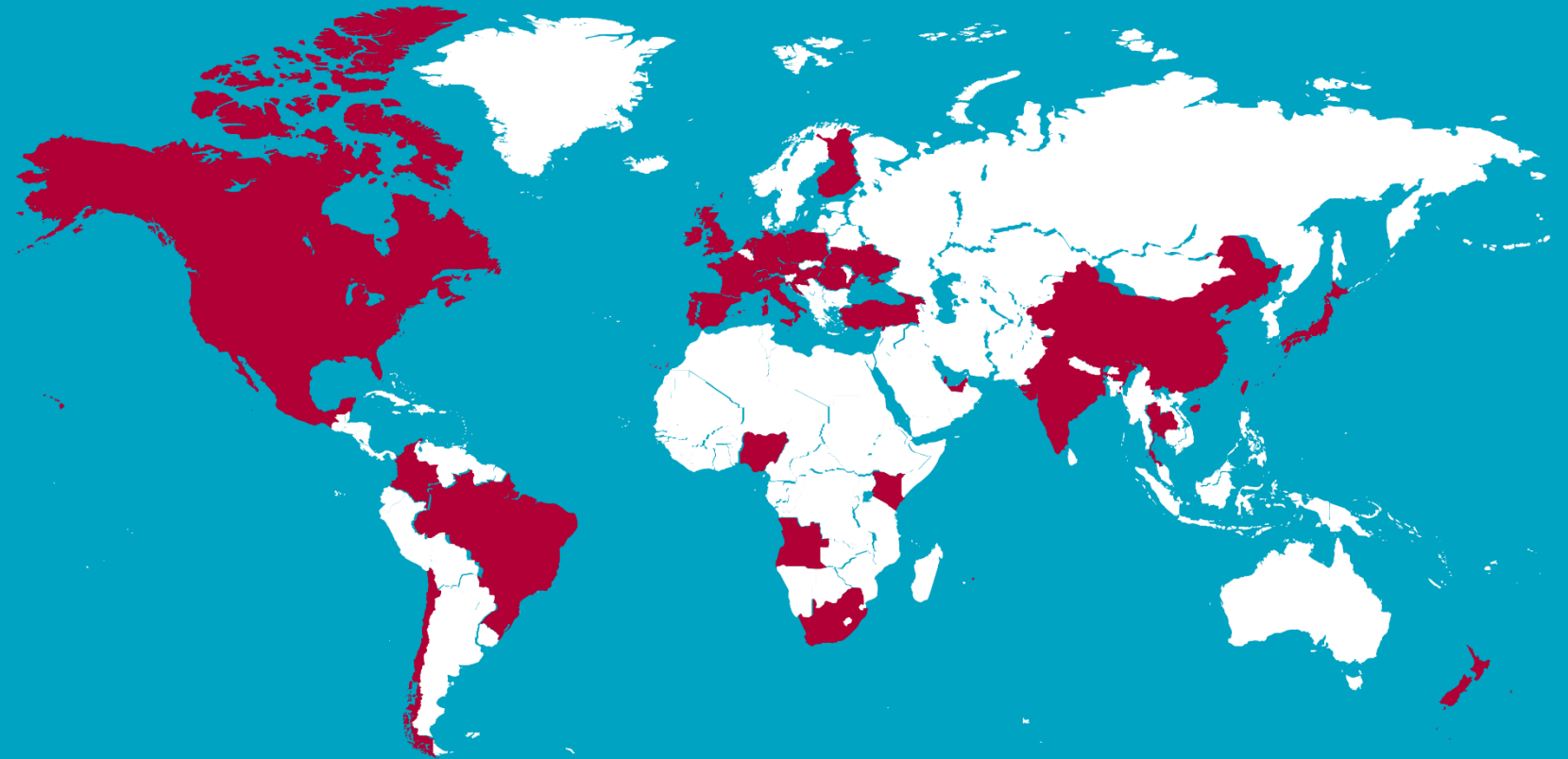
+60
Countries

Our Presence

Kaizen Institute Worldwide

We are based in the following countries around the world:

Angola	Mexico
Austria	Netherlands
Brazil	New Zealand
Canada	Nigeria
Chile	Poland
China	Portugal
Colombia	Qatar
Croatia	Republic of Ireland
Czech Republic	Romania
Finland	Singapore
France	South Africa
Georgia	Spain
Germany	Switzerland (Global Operations)
Hungary	Thailand
India	Turkey
Italy	United Arab Emirates
Japan	United Kingdom
Kenya	Ukraine
Malta	United States of America
Mauritius	



● Countries where we have
Kaizen Institute offices

KAIZEN™ in All Sectors of the Economy

DISCRETE PRODUCTION & ASSEMBLY



CONTINUOUS PROCESS INDUSTRIES



TRANSPORTATION & WAREHOUSING



SERVICE BASED, RETAIL & HOSPITALITY



PUBLIC SECTOR & HEALTHCARE



PROJECT BASED MINING, OIL, GAS, & CONSTRUCTION



Consulting

WE TRANSFORM TEAMS INTO REAL KAIZEN™ PLAYERS, CAPABLE OF LEADING CHANGE WITHIN THEIR ORGANISATIONS



Daily KAIZEN™

Under the Daily KAIZEN™ programme, teams and their leaders acquire management and problem-solving skills that will enable them to improve their results.

They will be able to design and implement incremental improvements in their teams.



Value Stream KAIZEN™

With the Value Stream KAIZEN™ skills, leaders will be able to improve business processes by implementing innovative solutions together with project teams.

They will transform interdepartmental processes, contributing with disruptive improvements to key performance indicators.



Strat KAIZEN™

The success of the business strategy will be made possible through an effective methodology of selecting strategic initiatives, deployment across the organisation and gaps correction.

The strategy will be understood by all collaborators and each one will have a clear contribution for the growth of the organisation.

WE ENSURE THE SUCCESS OF OUR CUSTOMERS, WITH A HANDS-ON APPROACH

Our approach is practical, pragmatic and collaborative

We work with our customers' teams, in their Gemba, at their place of work, be it an industrial or office environment. We are on site where the action takes place and observe the opportunities first-hand.

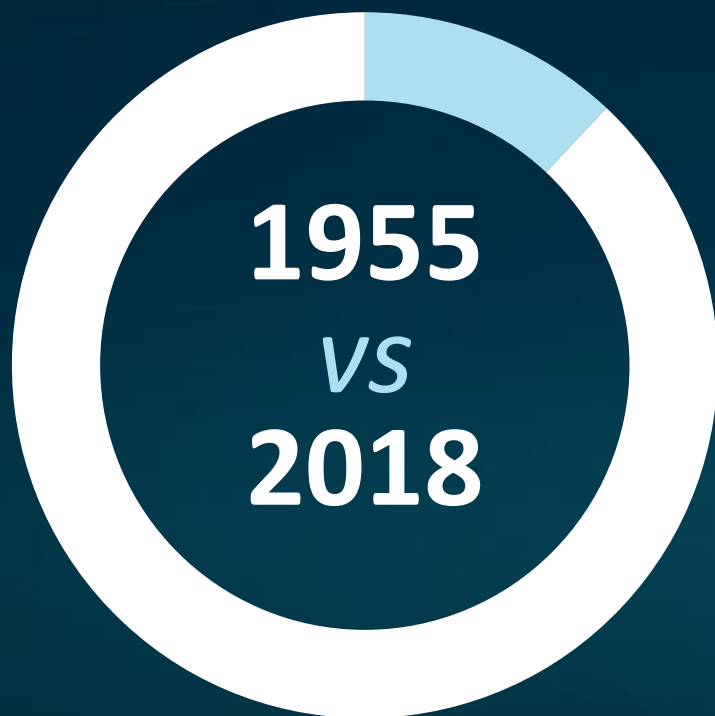
The contribution of the teams is key for the success of any transformation

From day one, all collaborators are involved in the project. During implementation, our customers' teams develop skills that will enable them to build sustainable improvements.

We support the implemented solutions with analytical tools

The decision processes are supported by robust data collection and data-processing models, from the diagnosis phase to the project implementation phase. This information is arranged in a simple, visual way, and is accessible to everyone.





Only **12%** of the companies listed in the **Fortune 500** magazine in 1955 are still part of this list after 63 years



Kodak

Share
Memories,
Share **Life**



Change Resistance



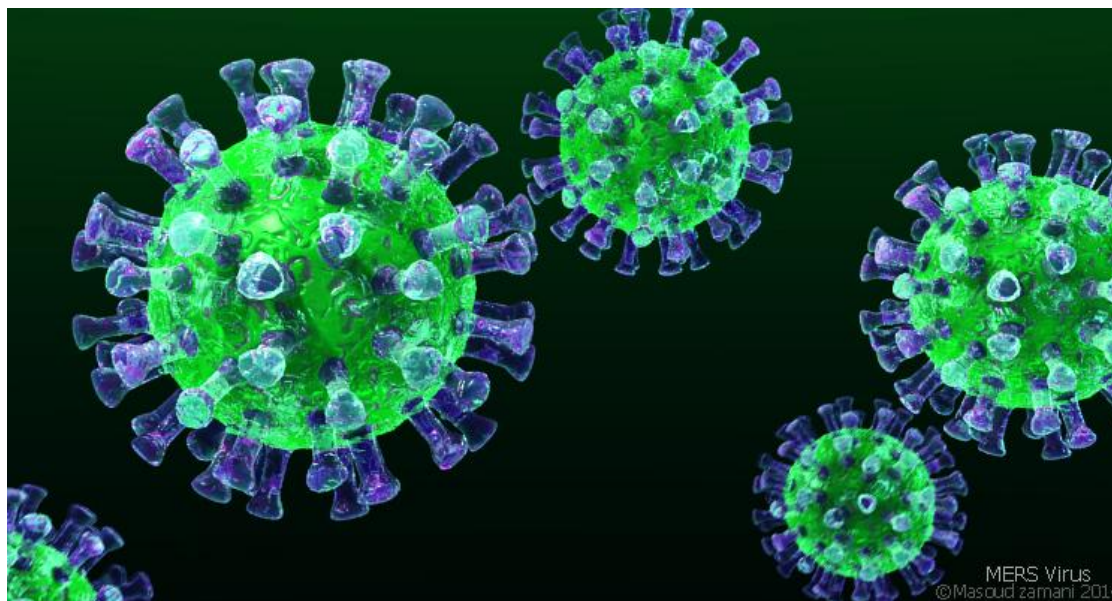
Never be
without
a **Movie**



Change Resistance



*When a **paradigm** changes,
everyone goes back to zero*



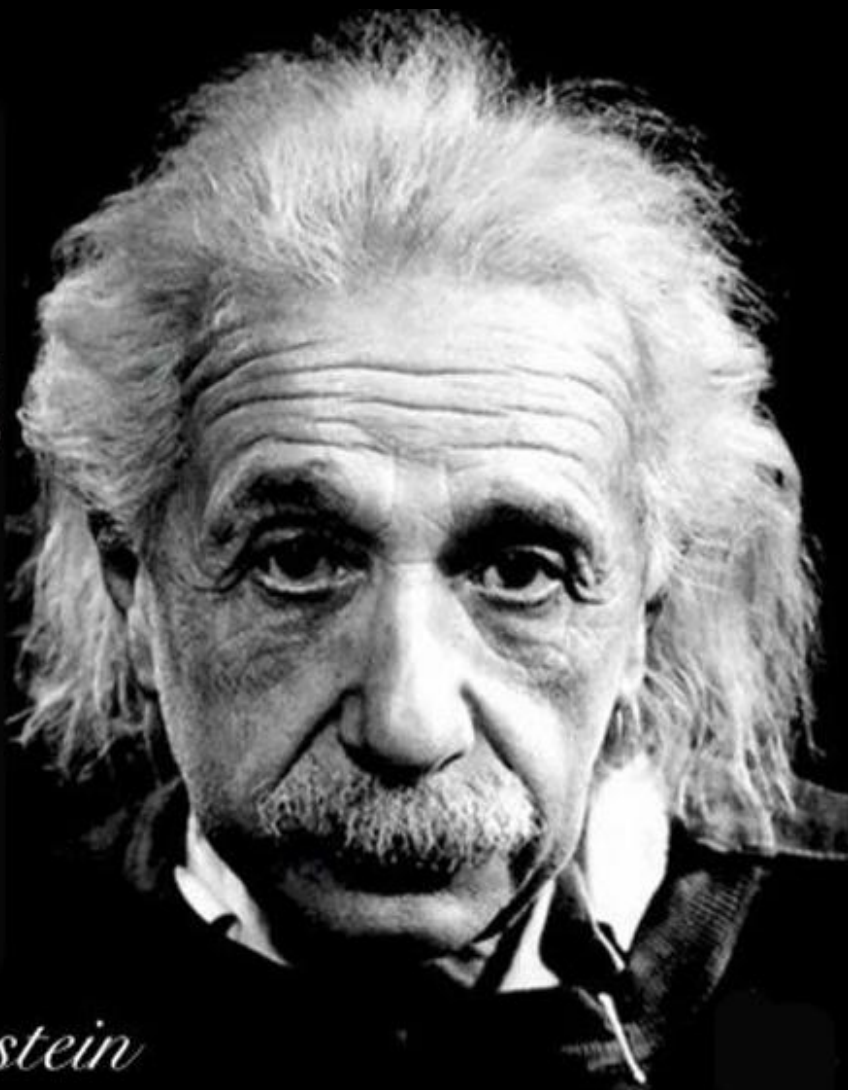
“ *The survival of the fittest*

IT IS NOT THE STRONGEST SPECIES THAT
SURVIVE, NOR THE SMARTEST, BUT THE
MOST ABLE TO CHANGE

”

Insanity:
doing the same thing
over and over again
and expecting
different results.

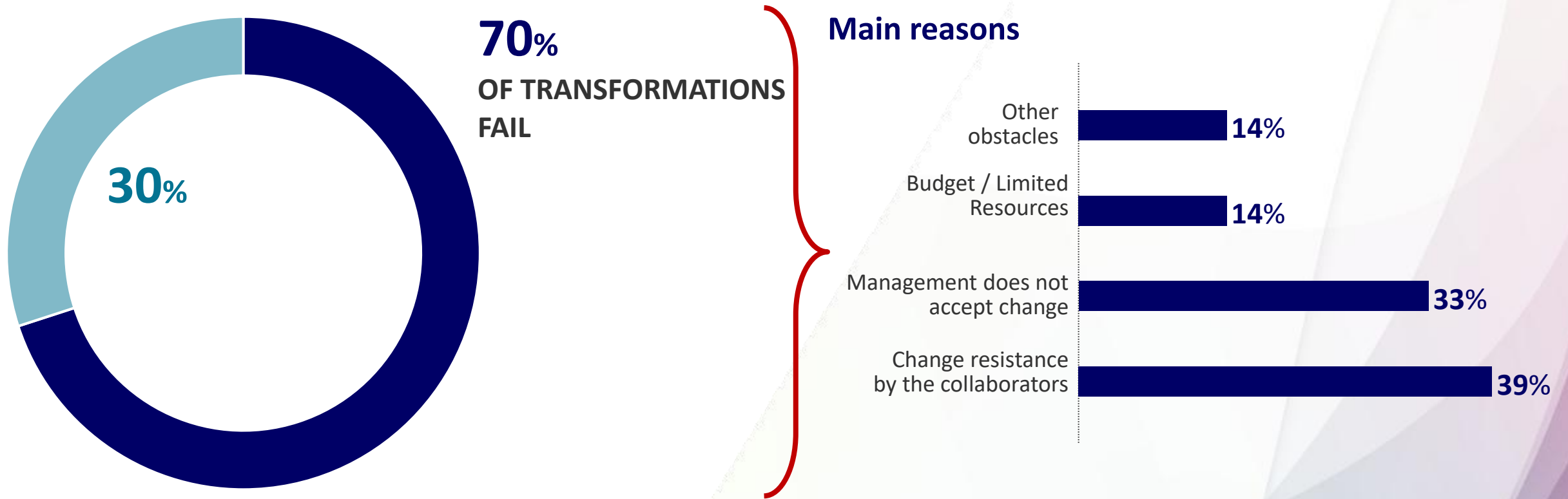
- Albert Einstein



***Only 20% of the organisations
that started a Lean
implementation achieved
success...***

Source: Survey to Executives of 184 Organisations by Bain & Company

REASONS FOR LEAN TRANSFORMATION FAILURES



ON AVERAGE THE RESULTS ARE NOT BRILLIANT

Resistance to Change



KAIZEN[™] cannot be delegated, *it has to be led!*

Top Management Engagement

All successful KAIZEN Transformations were led by a Present and Interventive **Top Management**

All successful **Management Teams** participated in KAIZEN[™] Events / Projects



**“ONLY STRONG MANAGEMENT LEADERSHIP
WILL GET THE ORGANISATION ON THE NEW PATH...
I UTILISED MY AUTHORITY TO THE FULLEST EXTENT**

TAIICHI OHNO, EVOLUTION OF THE TOYOTA PRODUCTION SYSTEM

”

KAIZEN™ is Based on Fundamental Principles

1. Create Customer Value



Capture the **Voice of the Customer**

Quality First

Improve **Customer Experience**

2. Create Flow Efficiency



Reduce **Muda, Mura and Muri** = waste

Implement actions to improve the **End-to-End Flow**

Pull at Customer demand

3. Be Gemba Oriented



Gemba = where Value is Added

Go to Gemba to solve problem at **Root Cause**

Standardize processes

4. Empower People



Develop high performing **teams**

Set **strategy aligned** team goals

No **blaming**

5. Be Scientific & Transparent



Long Term Thinking

Speak with **Data**

PDCA/SDCA

Reflect, Learn & Improve

Goal: Creation of Flow and Elimination of NVA

ELIMINATE NON VALUE ADDED (NVA) ACTIVITIES



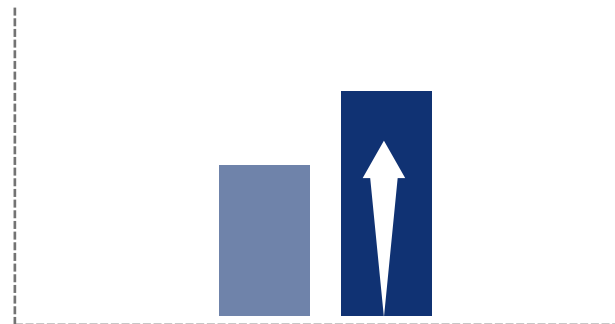
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- LESS STOCKS
- REDUCED COMPLEXITY
- LESS COST

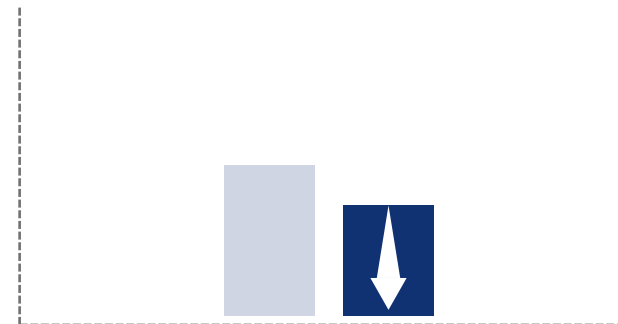
THROUGHPUT TIME



PRODUCTIVITY



COSTS



+

- HIGHER FLEXIBILITY
- BETTER SERVICE
- BETTER QUALITY

Eliminate Muda (Waste)

Added Value (VA) Definition



Taiichi Ohno (1912-1990)

What represents **Added Value (VA)** in your Company?

“ONLY ACTIVITIES THAT THE CUSTOMER IS WILLING TO PAY FOR.”

Eliminate Muda (Waste)

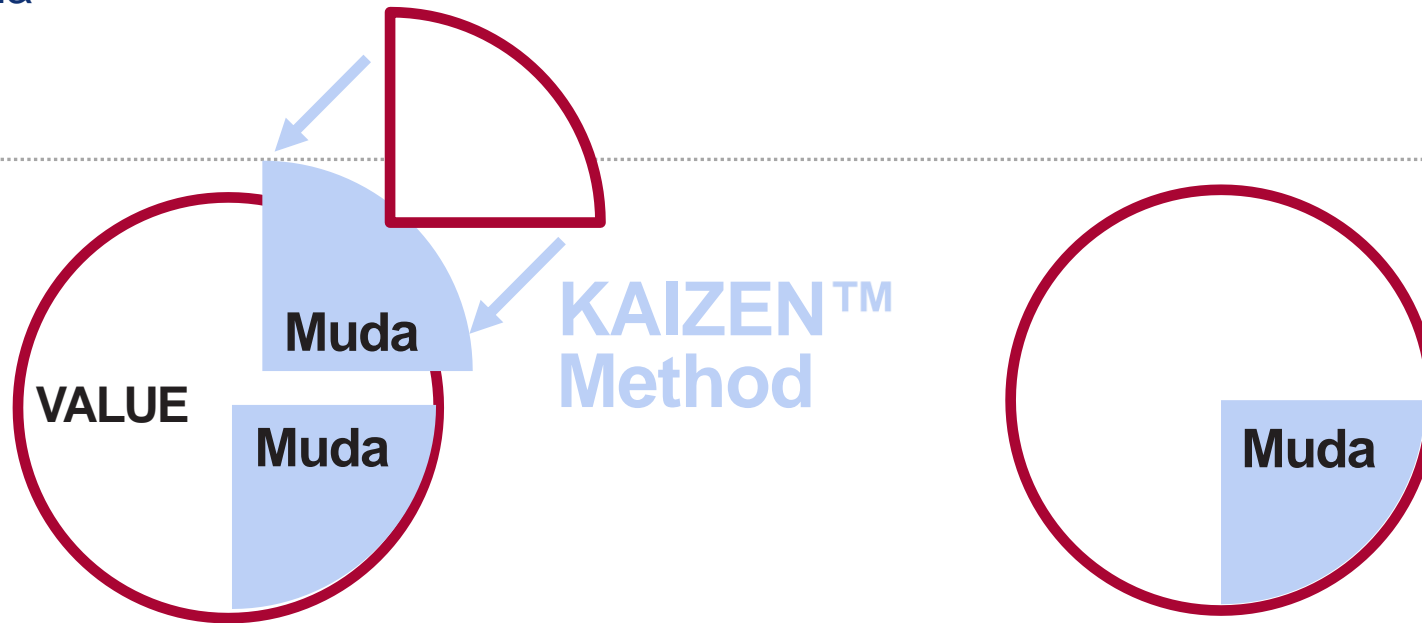
Added Value vs. Muda

**WHICH TASKS
TRANSLATE
TYPICALLY
INTO ADDED
VALUE?**

Move | Store | Remove | Count | Copy |
Search | Group | Handle | Inspect | Order |
Signal | Discard | Repair | Check | Restart |
Monitor | Print | Disassemble | Write |
Sequence | Process | Clean | Adjust |
Cancel | Change

Eliminate Muda (Waste)

Added Value vs. Muda



1st STEP

Perceive what is Added Value to consumers and costumers



 Muda Activities (Waste)

 Added Value Activities

2nd STEP

Eliminate what consumers and costumers don't care about (Muda)



3rd STEP

Reinforce Added Value



Eliminate Muda (Waste)

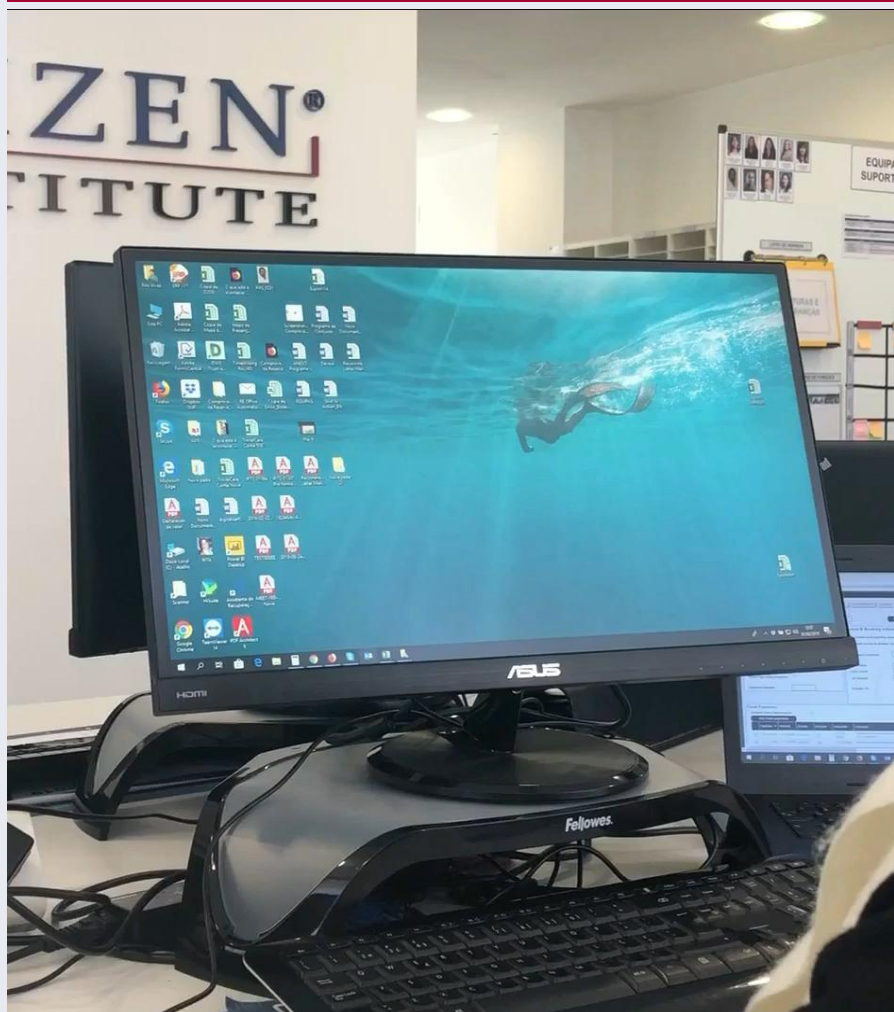
Added Value vs. Muda



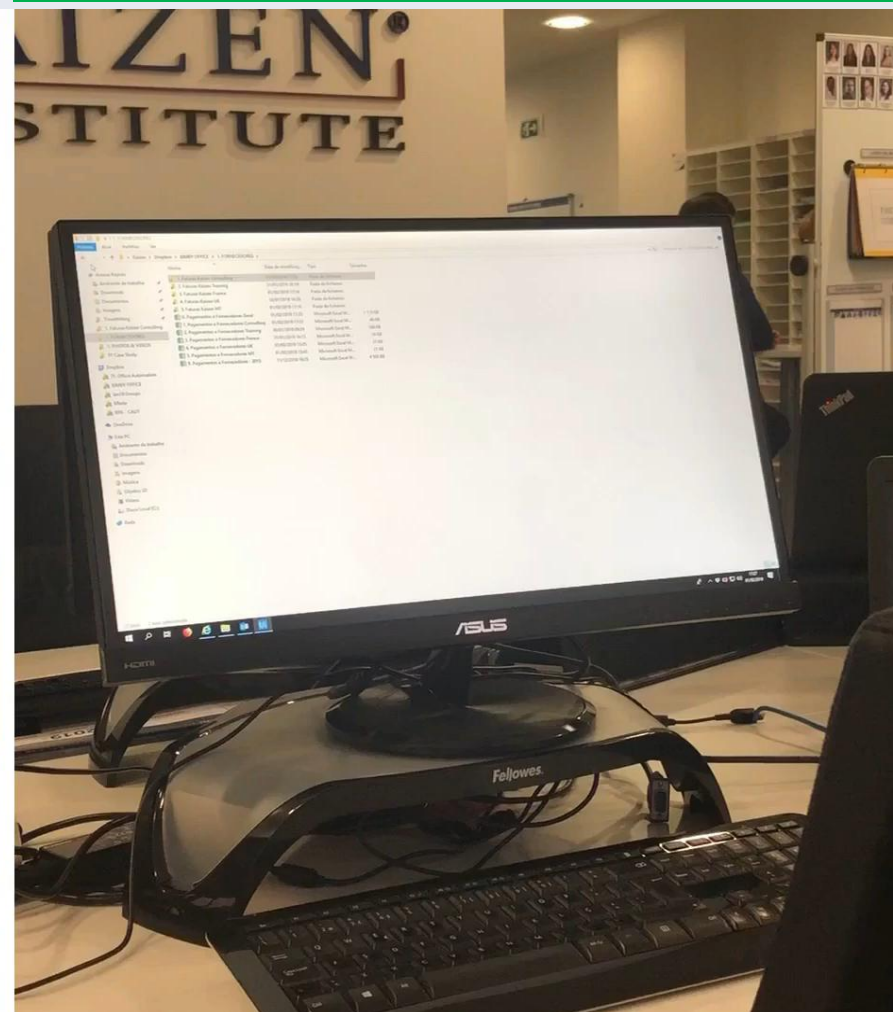
Vídeo

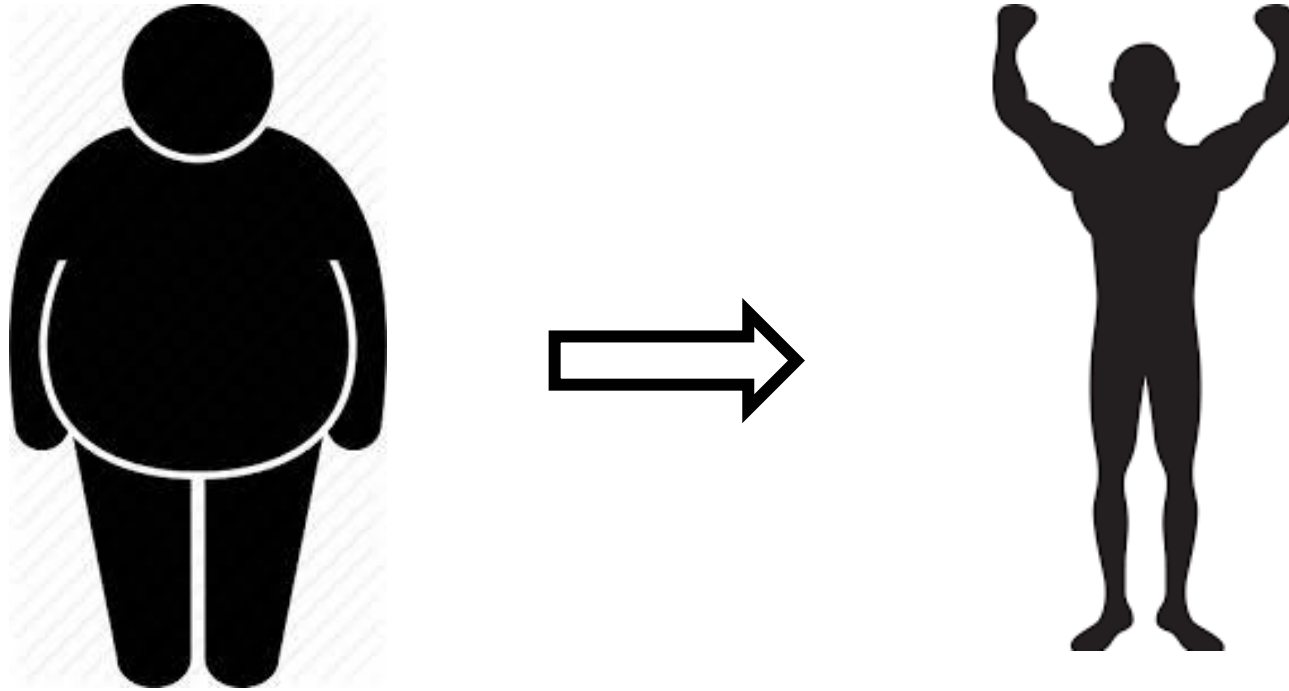
Exemplo de Office Automation

ANTES



DEPOIS





Implement Kaizen to become Lean

Analogy



LEAD THE CHANGE

Decision/commitment of the self,
cannot delegate



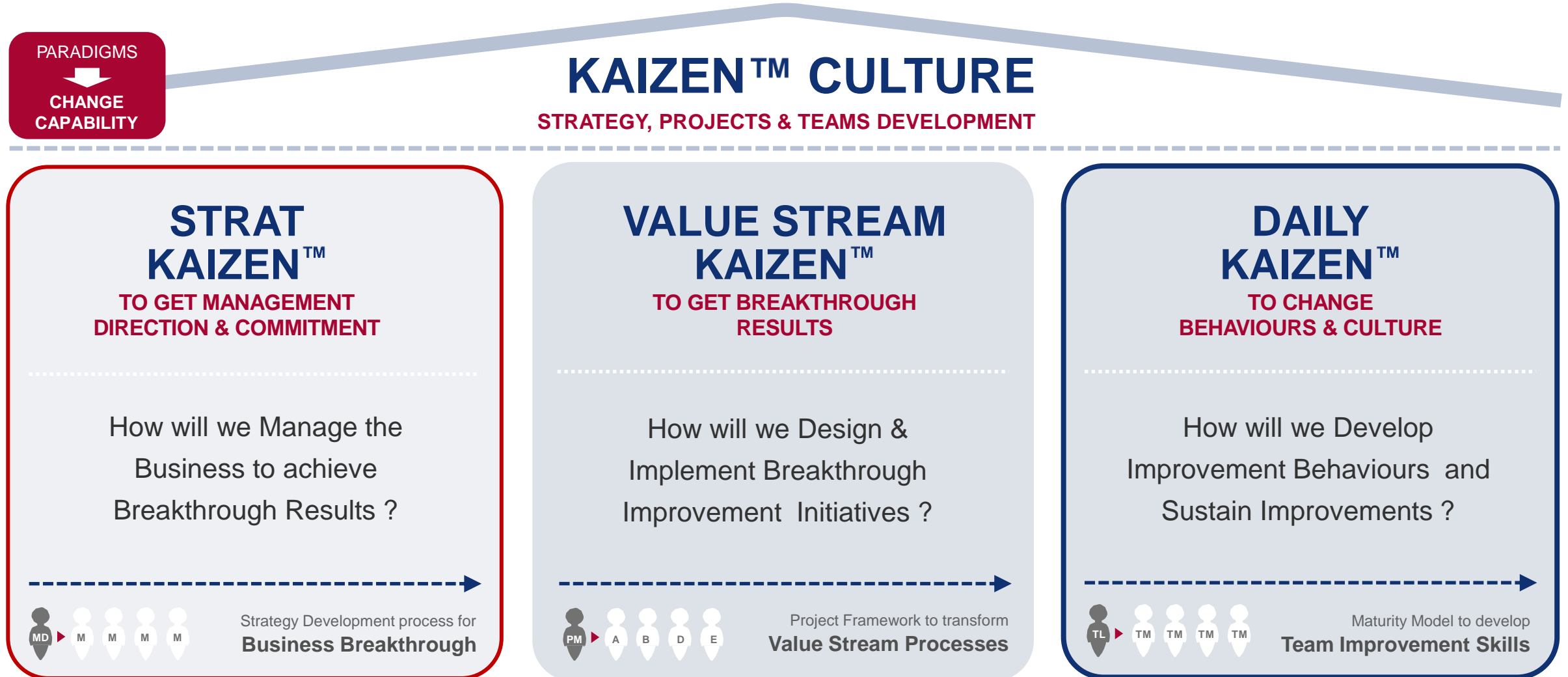
Intense exercise, calories cutting, calories counting, frequent measurements (breakthrough improvements)



New routines, study the subject, weight
monitorisation (incremental improvements)

KAIZEN™ CHANGE MODEL

3 Pillars to Implement a CI Culture



KAIZEN™ CHANGE MODEL

3 Pillars to Implement a CI Culture

PARADIGMS



CHANGE
CAPABILITY

KAIZEN™ CULTURE

STRATEGY, PROJECTS & TEAMS DEVELOPMENT

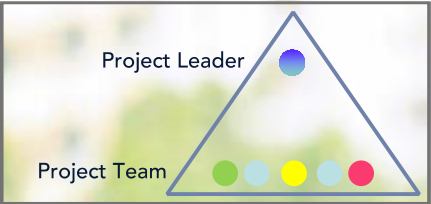
VALUE STREAM KAIZEN™

TO GET BREAKTHROUGH
RESULTS

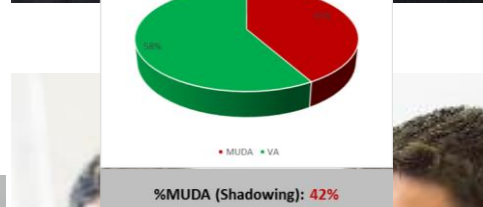
How will we Design &
Implement Breakthrough
Improvement Initiatives ?



Project Framework to transform
Value Stream Processes



Value Stream Planning to get Breakthrough Results



Value Stream Mapping

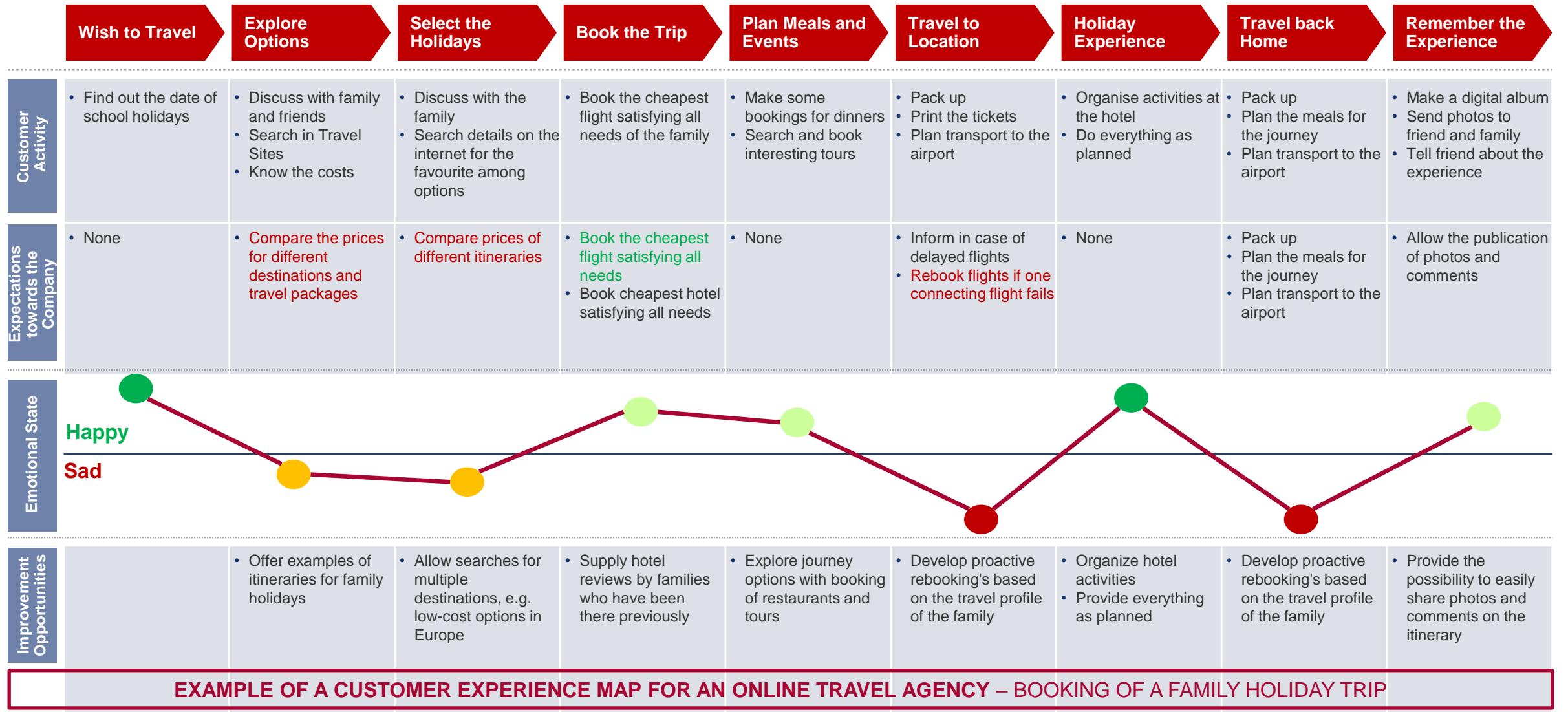


Value Stream Planning to get Breakthrough Results



Customer Experience Map

PROCESS STATES:



Breakthrough Process

Transversal to any methodology/area

DISCRETE PRODUCTION & ASSEMBLY INDUSTRIES



CONTINUOUS PROCESS INDUSTRIES



TRANSPORTATION & WAREHOUSING



SERVICE BASED, RETAIL & HOSPITALITY



PUBLIC SECTOR & HEALTHCARE



PROJECT BASED MINING, OIL, GAS, & CONSTRUCTION



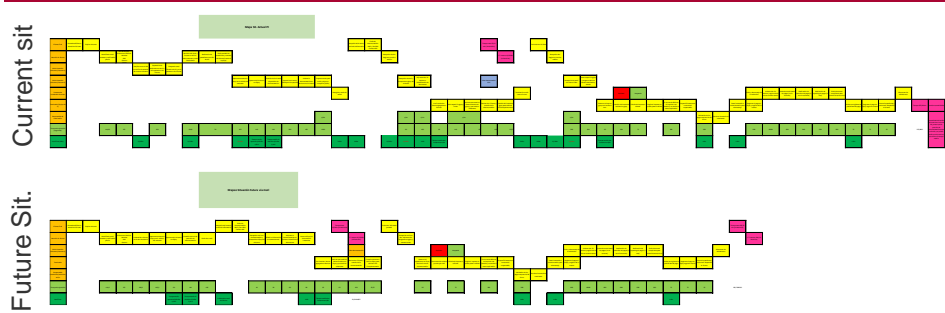
OPERATIONAL AREAS

TRANSACTIONAL AREAS

Material Flow



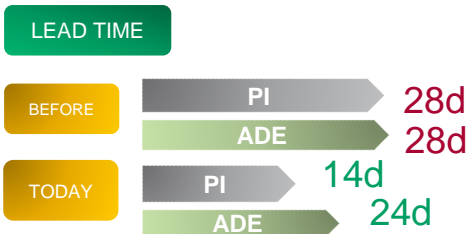
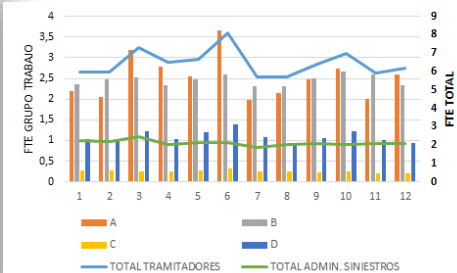
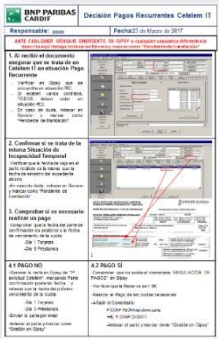
Pictures before



Used tools:

- Process Mapping, Standard Work, Daily Kaizen and Capacity Calculation

Pictures after



Problem definition

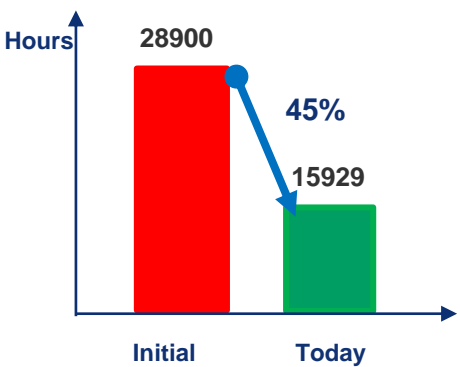
Before State

- Disintegrated processes, with many stakeholders, and high lead times
- Execution of tasks by external companies increasing Lead Time
- Information not available for all areas
- Low productivity and a lot of MUDA in operations
- Too much variability in workload

Target State

- Integration of operations, creation of flow and reduction of participants;
- Improved communication with customers;
- Standardization of tasks and reduction of waste
- Automation of reports
- Improvement of daily management, organization of equipment and spaces, and dynamics of continuous improvement (Daily Kaizen Program)

Value & Impact

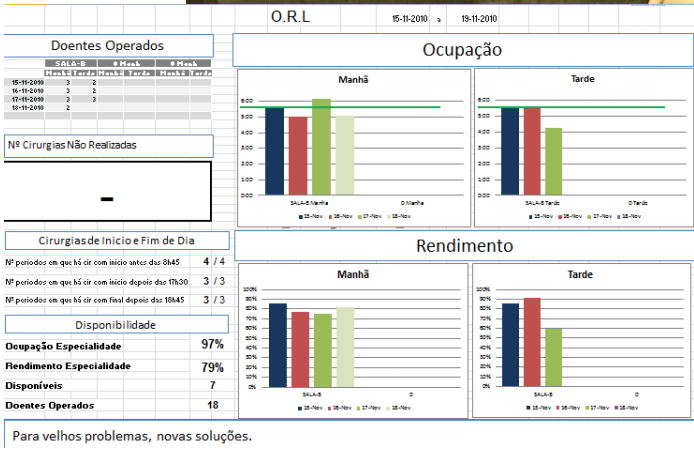
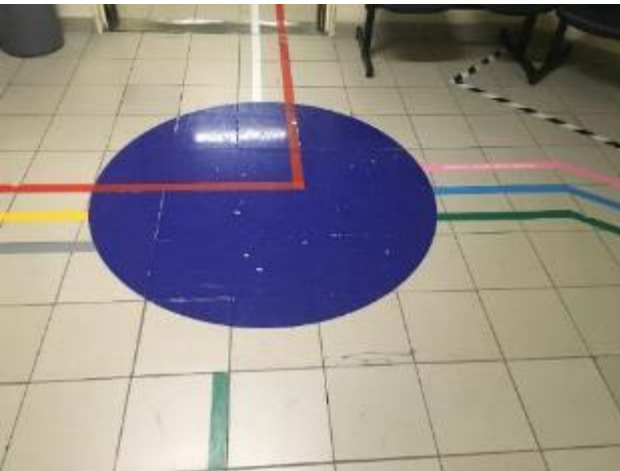


KPI	Initial	Today	Obj.
T. Process	28d	14d	14d
T. Realization	55min	45min	50min

12971 hours gained in productivity

Patient Flow

INTERNAMENTO	ACOLHIMENTO BLOCO	SALAS BLOCO	RECUBRO BLOCO
Ortopedia 2º Joana Silva	1º João Silva Ortopedia	Sala 1	Joana Silva Ortopedia Protese Anca Entrada recubro: 08:15
Cirurgia 3º José Pinto	2º Rita Gomes Cirurgia	Sala 2 1º Inês Sousa Cirurgia	Ana Sousa Ortopedia Protese Joelho Entrada recubro: 10:30
ORL 1º Rui Pinho 2º Rui Sousa 3º José Silva		Sala 3 Sala 4	



Customer Flow



Lean Project Management

1. New Car



2. New Plant or Production Line



3. New Computer Program



4. New Building or Road



APPLICATION AREAS

1. NEW PRODUCT

2. NEW PLANT

3. NEW SOFTWARE

4. NEW CONSTRUCTION

5. NEW EVENT

6. MAINTENANCE OVERHAUL

7. NEW BUSINESS

8. NEW SERVICE

5. Olympiads or Move to New Building



6. Renewal Maintenance Overhaul



7. New Business Process



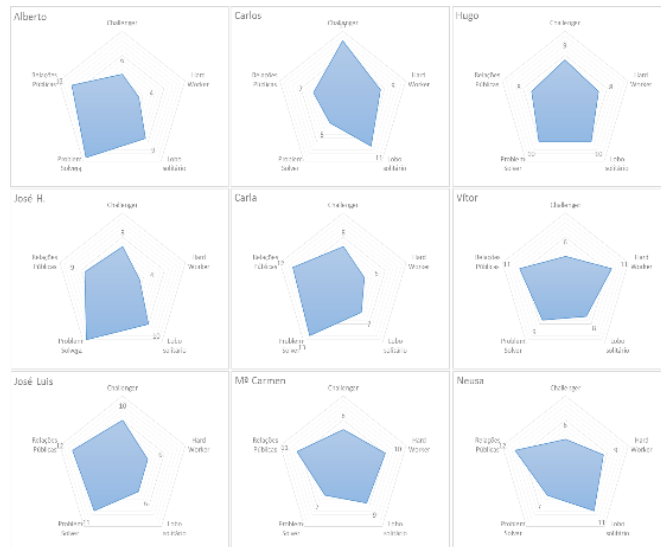
8. New Service



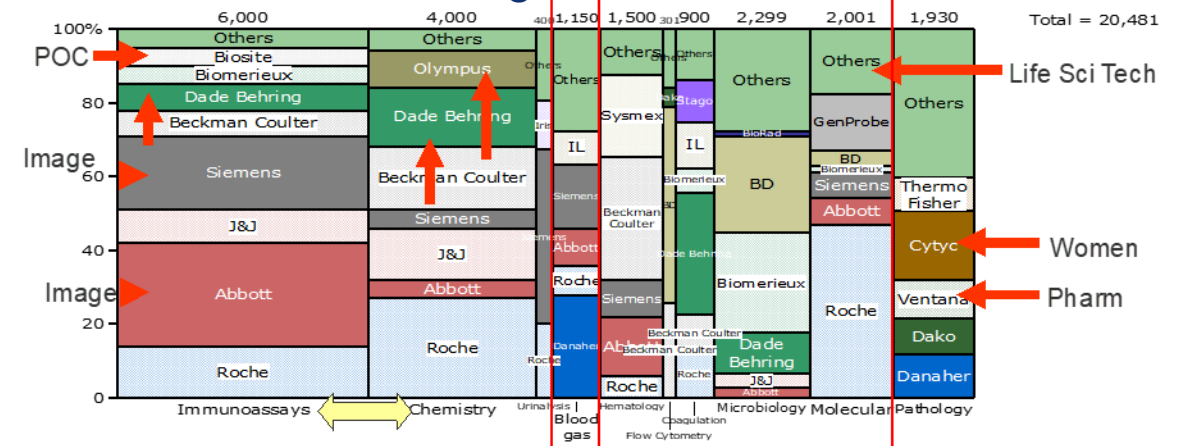
KAIZEN™ IN PROJECT BASED ORGANISATIONS

Marketing & Sales

Salesman Profile



Market Segmentation

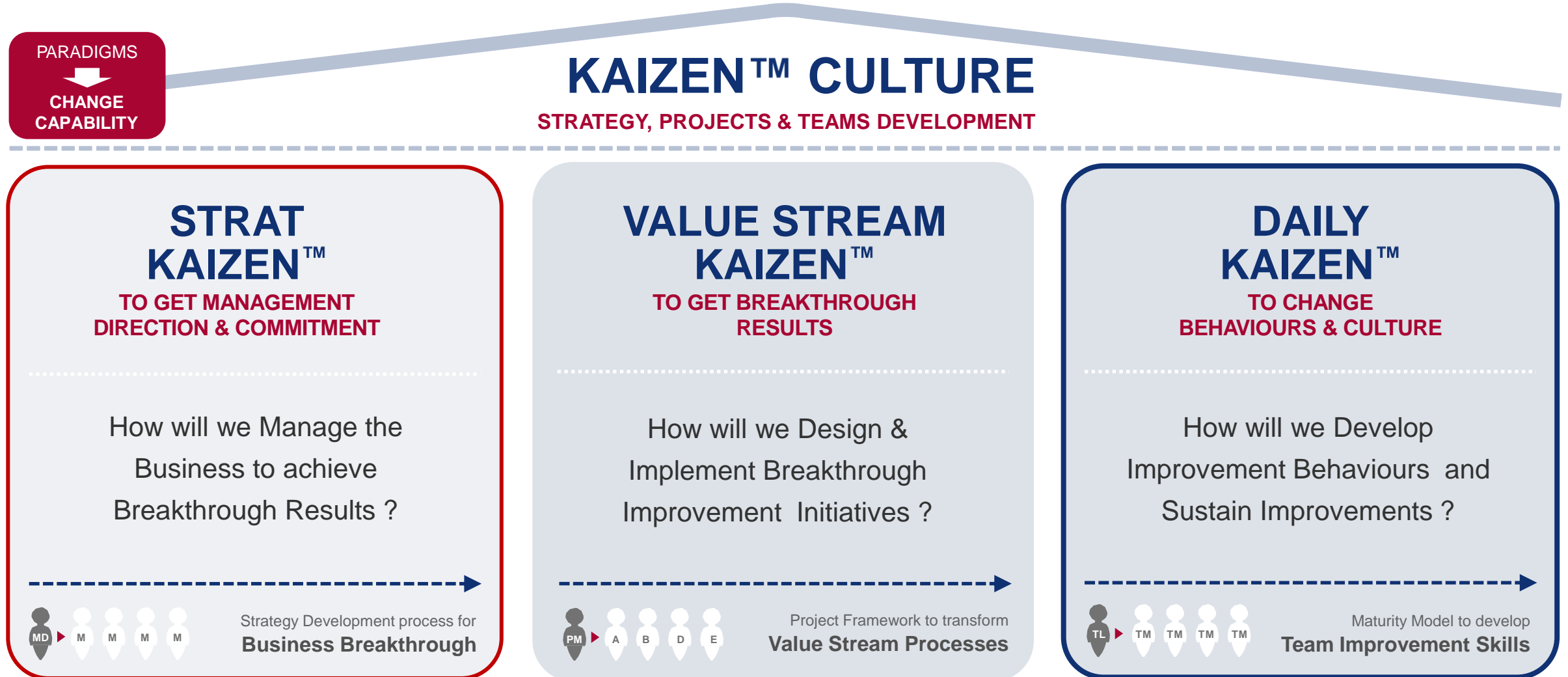


Voice of Customer



KAIZEN™ CHANGE MODEL

3 Pillars to Implement a CI Culture



KAIZEN™ CHANGE MODEL

3 Pillars to Implement a CI Culture



KAIZEN™ CULTURE

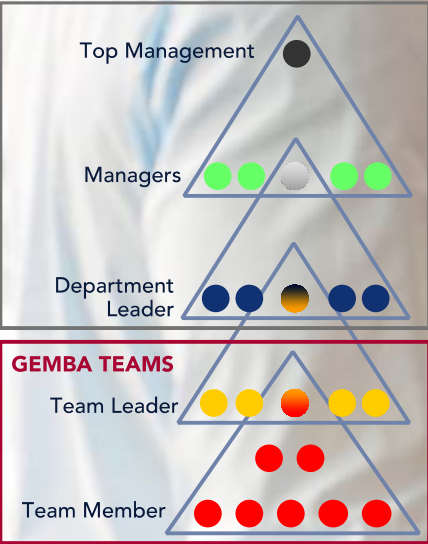
STRATEGY, PROJECTS & TEAMS DEVELOPMENT

**DAILY
KAIZEN™**
TO CHANGE
BEHAVIOURS & CULTURE

How will we Develop
Improvement Behaviours and
Sustain Improvements ?



Maturity Model to develop
Team Improvement Skills



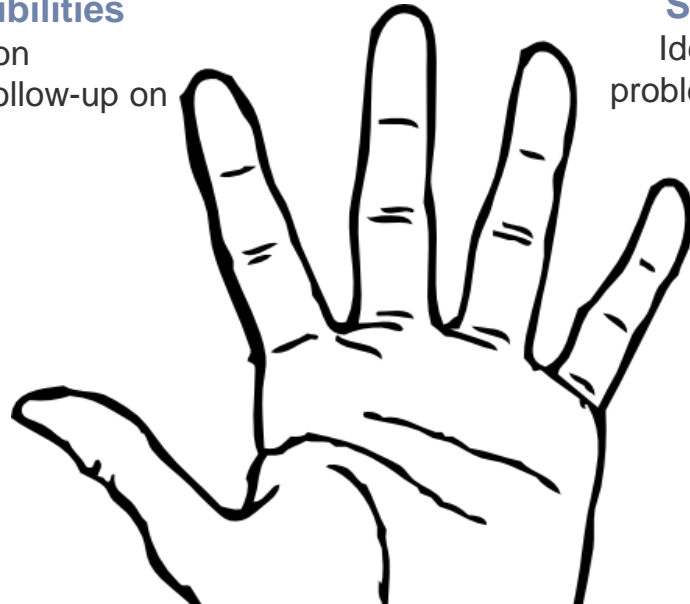
5 QUALITIES OF SUPERVISION

Skills to Teach

Share knowledge,
train team members

Knowledge of Responsibilities

Awareness of the impacts on
customers and suppliers, follow-up on
the team's work



Skills to Improve

Identify waste, solve
problems, improve the KPI

Knowledge of Work

Materials, tools, equipment,
products, services, standard
processes

Skills to Lead

Motivate people, manage
conflicts, create empathy

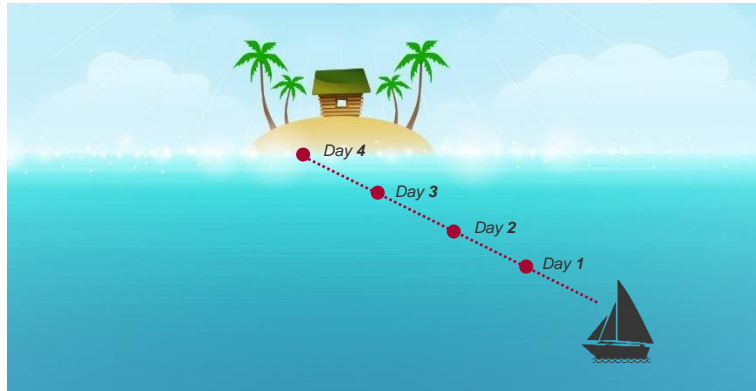
3 GOLDEN RULES

React Quickly to alerts signaled
by the Team Members

Monitor and communicate the
Team's Performance

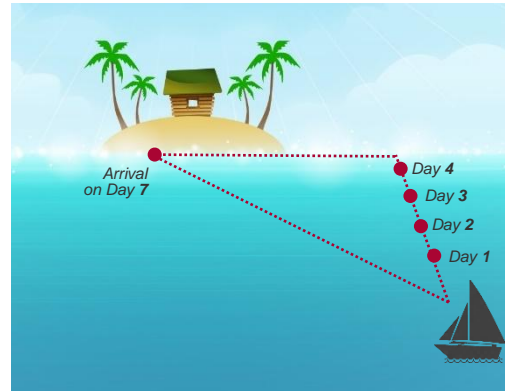
Implement necessary
improvements

Frequent Measurement



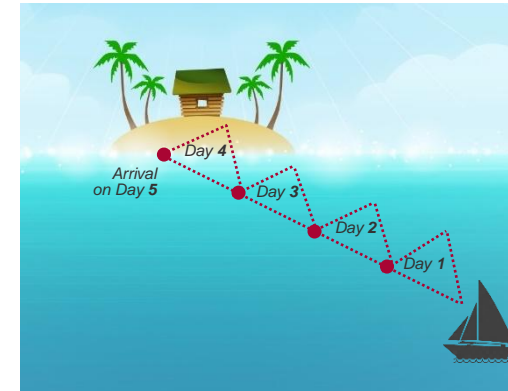
A BOAT TRIP WAS PLANNED
TO TAKE **4 DAYS**

DURATION: **7 DAYS**



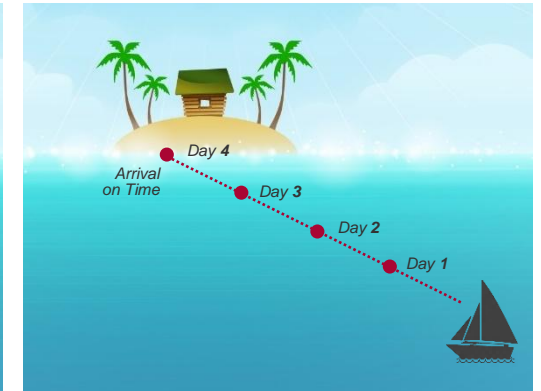
After four days the captain
checks his position

DURATION: **5 DAYS**



The captain checks his
position **every day**

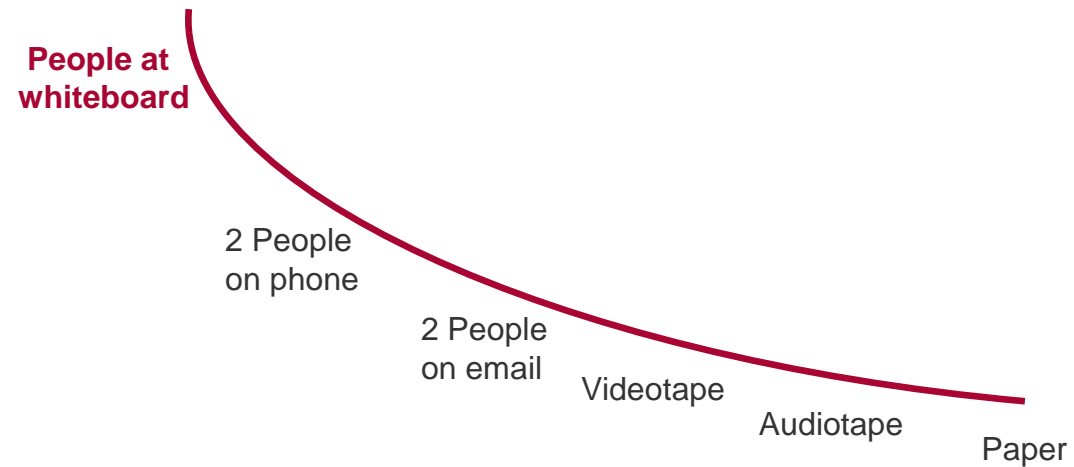
DURATION: **4 DAYS**



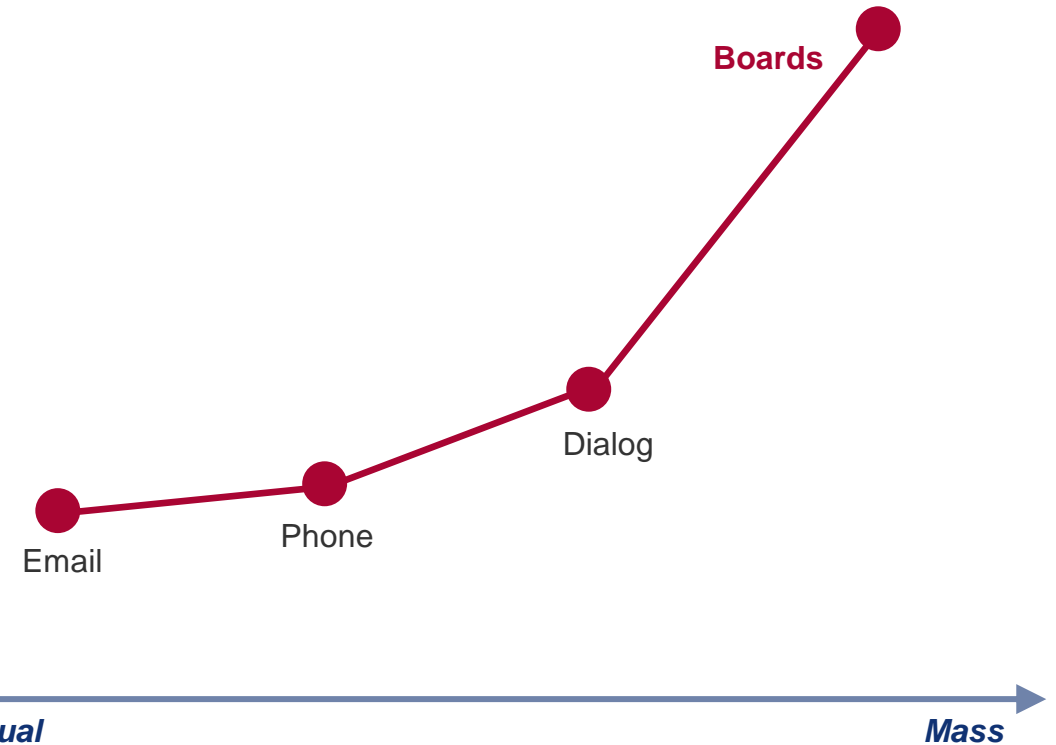
The captain checks his
position **every hour**

**MEETINGS ALLOW TO ALIGN THE DIRECTION AND PERFORMANCE OF THE TEAM IN ORDER TO
ELIMINATE DEVIATIONS**

COMMUNICATION EFFECTIVENESS



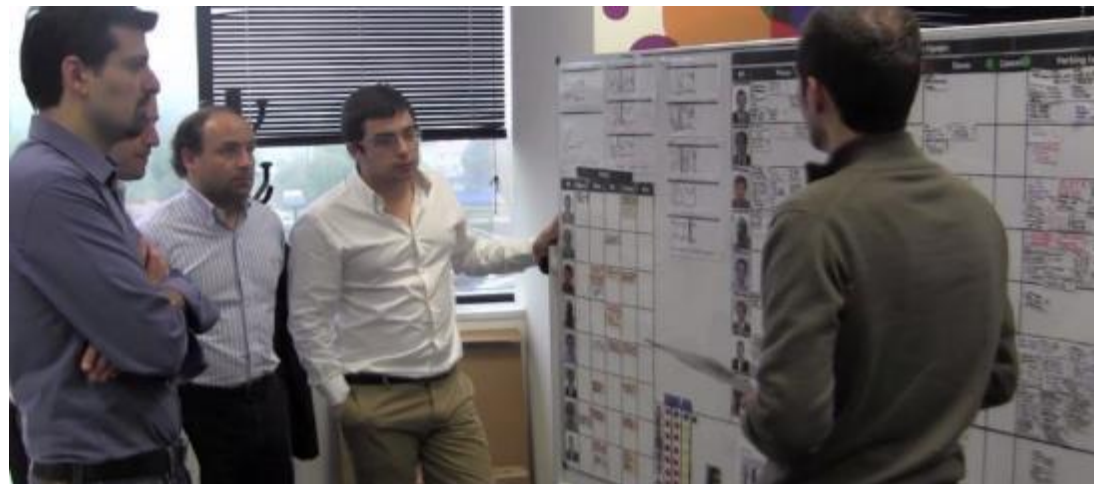
BRAIN ACTIVITY



Visual Management



Team Meetings



Organisation of Workplaces



Where is the medicine???

Organisation of Workplaces



1. SEIRI

Sort what is necessary and what is not

2. SEITON

Straighten what is needed in a simple and visual way

3. SEISO

Scrub to restore the area and equipment condition

4. SEIKETSU

Standardise to maintain the new conditions

5. SHITSUKE

Sustain to comply and improve the standards



5S correspond to **5 steps** that start with an **S** in Japanese

Method to **organise** work **spaces** and increase **efficiency**

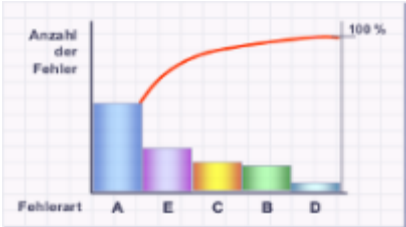


Problem Solving

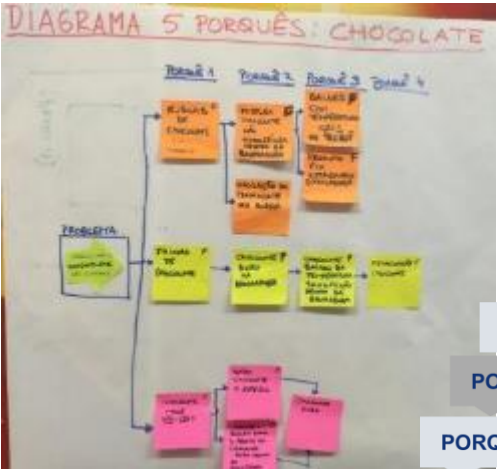
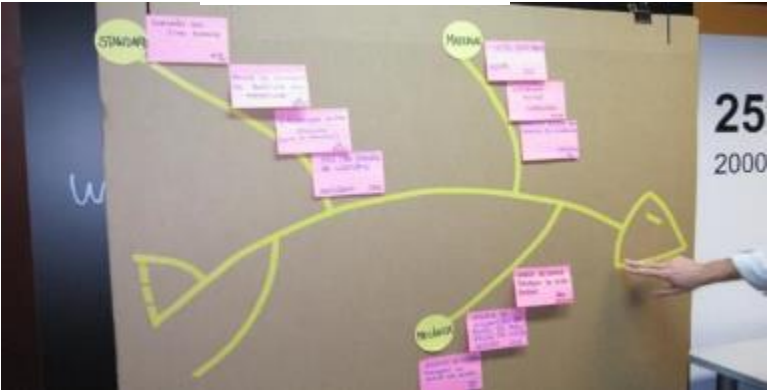
5 Whys

Ishikawa

Gemba Work



FOLHAS DE VERIFICAÇÃO				
PROBLEMA	TURNO			TOTAL
	1	2	3	
A	////		////	20
B	/		/	4
C		/		5
D	////		///	9
E	////	///	////	17
Resultado	21	10	24	55



Kobetsu

3C

#:

Equipa:

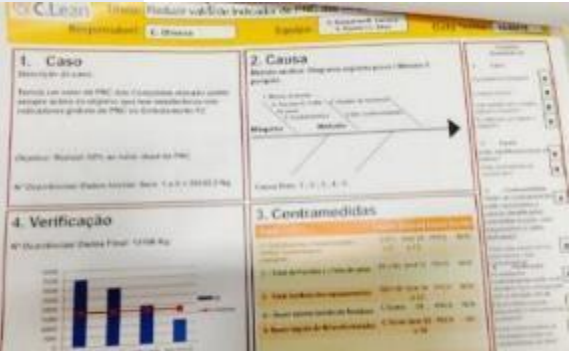
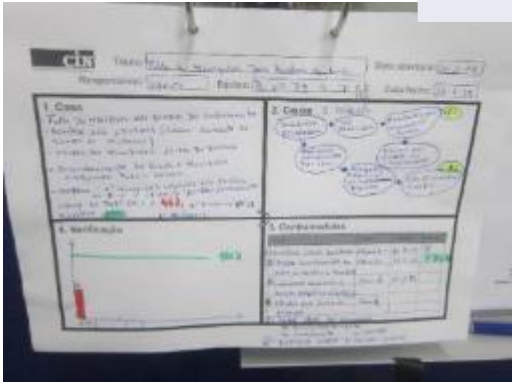
Data:

1. DESCREVER O PROBLEMA (CASO)

2. ANALIZAR CAUSAS RAIZ (CAUSAS)

3. DESENHO E TESTE DE SOLUÇÕES (CONTRAMEDIDAS)

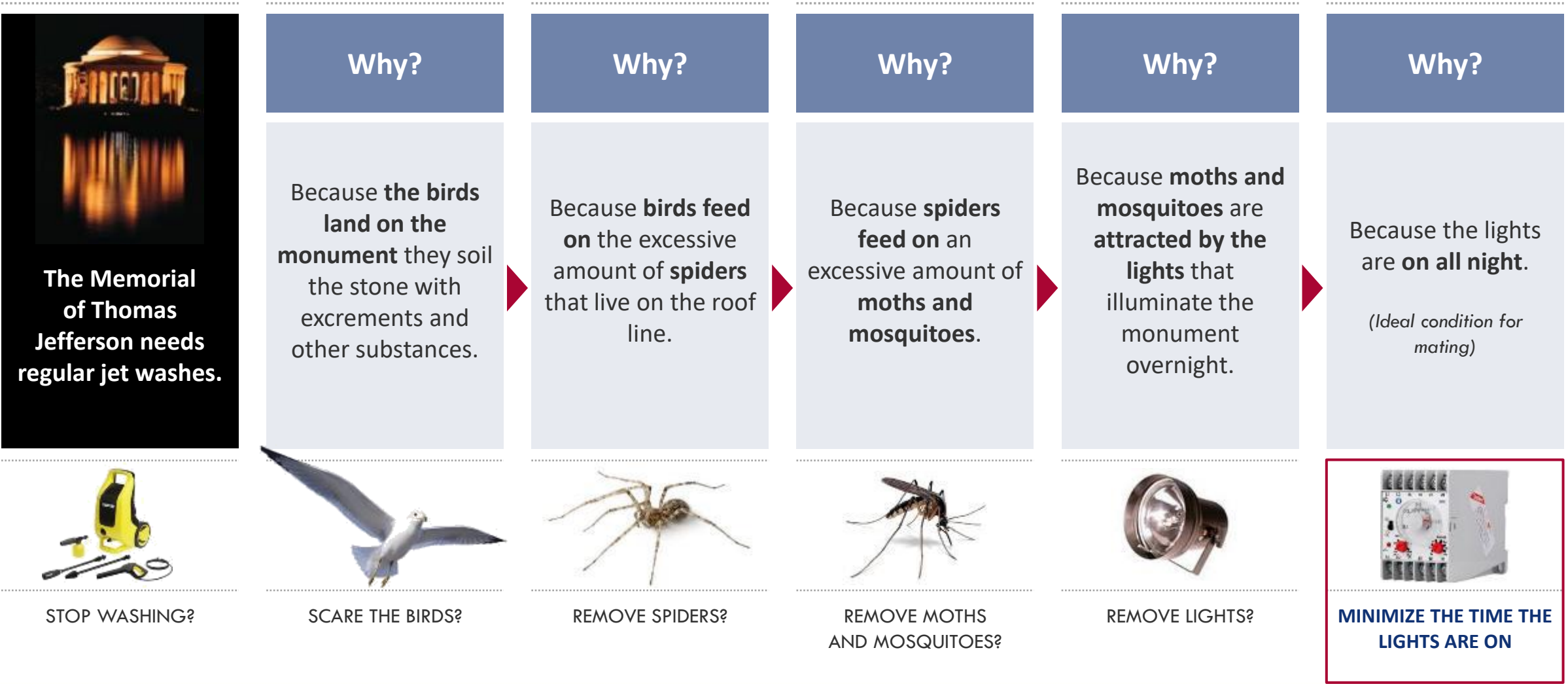
4. VERIFICAR RESULTADOS



“Recognising the problem is more important than finding a solution, because the exact description of the problem leads almost automatically to the correct solution.”

Albert Einstein

5 WHYS - IDENTIFY ROOT CAUSES

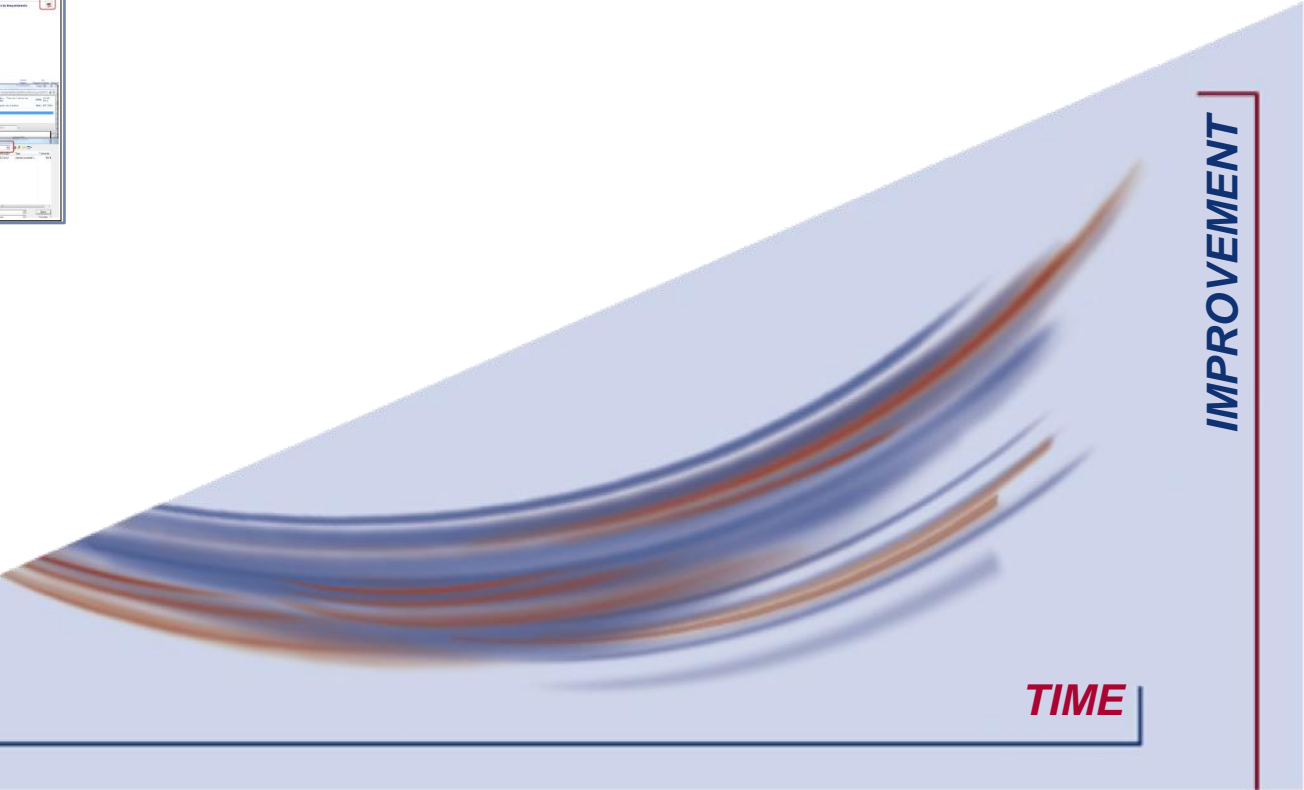
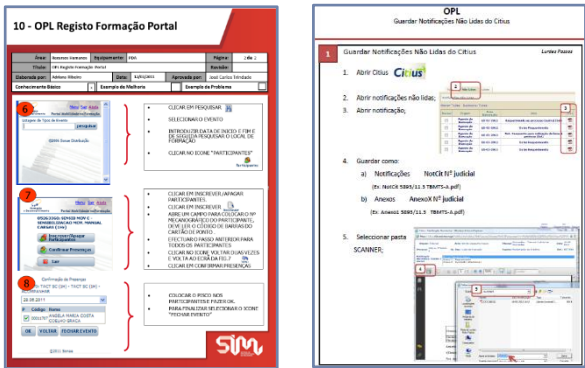


Low Cost Solutions



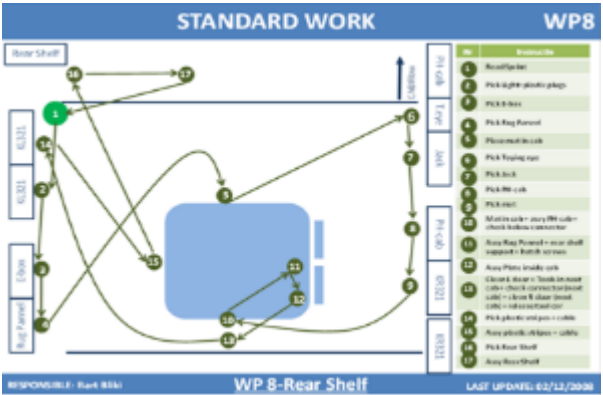
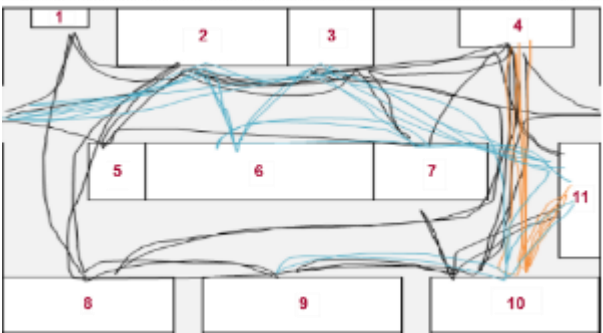
Standards as an Improvement Foundation

Definition



THE EASIEST, SIMPLEST AND SAFEST WAY OF DOING THE WORK, KNOWN SO FAR

Standard Work



10 - OPL Registo Formação Portal

Área: Recursos Humanos Equipamentos: PDA Página: 2 de 2

Título: OPL Registo Formação Portal Revisão:

Elaborado por: Adriana Ribeiro Data: 12/07/2011 Aprovado por: José Carlos Trindade

Conhecimento Básico Exemplo de Melhoria Exemplo de Problema

6. Pesquisar

Selecionar o evento

Introduzir data de início e fim e de seguimento para pesquisar o local de formação

Clickar no ícone "PARTICIPANTES"

7. Inscrever/Apagar Participantes

Clickar em INSCREVER/APAGAR PARTICIPANTES

Clickar em INSCREVER

Abre um campo para colocar o Nº MECANOGRÁFICO DO PARTICIPANTE, DEVE-LE O CÓDIGO DE BARRAS DO CARTÃO DE PONTO

Efectuar o passo anterior para todos os participantes

Clickar no ícone VOLTAR DUAS VEZES E VOLTA AO ECRÃ DA FIG.7

Clickar em CONFIRMAR PRESENCAS

8. Confirmação de Presenças

Clickar em TACT SC (SH) - TACT SC (SH) - ACOMPANHAR

28.06.2011

Código Home

00011707 ANGELA MARIA COSTA COELHO GRACA

OK VOLTAR FECHAR EVENTO

OPL

Guardar Notificações Não Lidas do Citius

1. Guardar Notificações Não Lidas do Citius

2. Abrir Citius

3. Abrir notificações não lidas;

4. Abrir notificação;

5. Guardar como:

a) Notificações NotCit Nº judicial (Ex: NotCit 5893/11.3 TBMTS-A.pdf)

b) Anexos AnexoX Nº judicial (Ex: Anexo1 5893/11.3 TBMTS-A.pdf)

6. Seleccionar pasta SCANNER;

TOWER COOLING AND EXTRUDER 1 COOLING

Ensure the correct functioning of the cooling tunnel from extruder 1. Whenever necessary to use the cooling tunnel, the shift coordinator should before (30 minutes earlier) ensure the system maintenance:

1. On the panel near Extruder 1 turn the pump to "0" - pump off

2. Place the bottom "tower" in position "0" on the panel near the cooling tower

3. Check tank's water level.

4. Remove filter protection


5. Relieve the tightness of the filter

6. Remove filter and clean with water

7. After cleaning place filter back into position and secure it

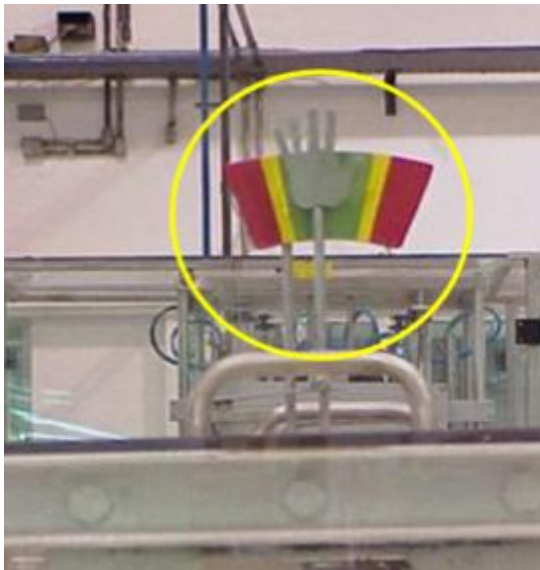
8. Check on the board by the water circulation system if all switches are in position "A or 1"

9. On the panel by the Extruder 1 place the pump in "A" - pump in automatic

 centro hospitalar do Porto	STANDARD TO COLD CHAIN	1/1
	Daily Individual Distribution	

- Prepare the cold medicine when DID suitcases will leave, in individual plastic bags.
- Put it in the patient drawer, in DID suitcase, the cold medicine alert card.
- Place the cold medicine inside the thermal suitcases with cold accumulators.
Note: each Service has 2 thermal bags identified
- Put in the thermal suitcase the cold medicine list by patient.
- On the Service, AAM leaves the thermal suitcase full and the Nurse signs the cold medicine list received.
- Bring to Pharmaceutical Services the thermal suitcase of the previous day with the respective returns.
- The DID Technician checks, returns and put back in place the medicine returned on the thermal suitcases

Make the Gemba Visual



Managing the Change



Examples

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PRACTICE AND PERSEVERANCE IS NEEDED"



THANK YOU