

VISUAL LEADERSHIP FOR OPERATIONAL EXCELLENCE: PRINCIPLES, PRACTICES, AND METHODS

Proposal submitted by
VISUAL THINKING•EUROPE AND 4RESULTS (AUGUST 17, 2022)

1.0. BACKGROUND



For over 30 years, Dr. Gwendolyn Galsworth, founder/president of Visual Thinking Inc. (“VTI”) has been in the business of assisting companies, large and small, implement the technologies of the visual workplace as a means of achieving and sustaining: 1) precision performance with trackable bottom-line results, 2) an empowered workforce, and 3) strategic and tactical leadership within and across the enterprise.

At the core of these outcomes is Dr. Galsworth definition of a visual workplace:

A work environment that is self-ordering, self-explaining, self-regulating and self-improving—where what is supposed to happen, does happen, on time, every time, day or night—because of visual devices.

VTI has developed a robust curriculum of these technologies (right) and successfully implemented them in companies all over the USA and abroad. We now offer them onsite, online, and through VTI’s Visual-Lean Institute, our educational arm.

With the publication of Dr. Galsworth’s Shingo award-winning books, *Visual Workplace/Visual Thinking* and *Work That Makes Sense*, VTI has established the field standard of excellence in what workplace visibility is and how to achieve it through people. (See Attachment A for Galsworth’s bio.)

Course Number	Course Title
Course 1	Visual Workplace-Visual Thinking Briefing + Pre-Launch Planning
Course 2	Visual Order-Visual Inventiveness Implementation Suite
Course 3	Work That Makes Sense: Operator-Led Visuality
Course 4	Becoming a Leader of Improvement (I): New Role for Supervisors & Managers Management by Sight: Visual Displays-Control Boards
Course 5	Visual Machine® Implementation Suite Machine Lubrication: Visual & Effective
Course 6	Becoming a Leader of Improvement (II): Policy Deployment (Dive Plans & The Operations Road Map) Creating a Business System Template
Course 7	Visual-Lean® Office Implementation Suite
Course 8	Becoming a Leader of Improvement (III): The Scoreboarding Process Visual Metrics-Visual Results Smart Production Control (Visual Management)
Course 9	Visual Adherence Achieving Zero Defects: Visual Guarantees (Poka Yoke) Visual Standards-Visual Controls

2.0. THE NEED

As companies pursue operational excellence, they often overlook the environment in which excellence happens: the physical workplace. This is the domain of visibility. The outcome of a successful implementation of workplace visibility is an interconnected network of visual devices that embed your current level of operational excellence. Even if you are not quite as excellent as you wish you would be right now (or know you will be in the not-too-distant future), visibility provides the platform which every company needs in order to stabilize, grow, and sustain.

Based on his recent assessment of company facilities, Irek Bilinski (CEO and senior consultant at 4Results/Warsaw) believes that a systematic application of visual leadership principles and practices will prove a powerful step in defining and driving important operational and developmental outcomes. Dr. Galsworth calls this process *Visual Leadership for Operational Excellence (VL4OE)*. We propose the following five deliverables in achieving enterprise-wide alignment and its next growth phase through the visual leadership process: *



- A. THE 10-DOORWAY/VISUAL THINKING BRIEFING: CREATING A WORKFORCE OF VISUAL THINKERS**
- B. BECOMING A LEADER OF IMPROVEMENT: A NEW ROLE FOR EXECUTIVES AND SUPERVISORS**
- C. VISUAL LEADERSHIP FOR EXECUTIVES: DEVELOPING AN OPERATIONS SYSTEM IMPROVEMENT TEMPLATE**
- D. VISUAL LEADERSHIP FOR EXECUTIVES: DEVELOPING THE X-TYPE MATRIX**
- E. VISUAL LEADERSHIP FOR EXECUTIVES: DEPLOYING THE X-TYPE MATRIX**

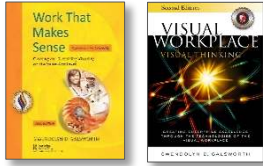
*See more in Chapters 3, 6, and 7 of Dr. Galsworth’s Shingo-award winning book, *Visual Workplace/Visual Thinking* (second edition).

3.0. PROPOSED DELIVERABLES

DELIVERABLE A. THE 10-DOORWAY/VISUAL THINKING BRIEFING. This briefing provides a conceptual understanding of the visual workplace, with some 100 examples of visual solutions from many companies. After an overview of Galsworth’s *Ten Doorway* model, which is at the heart of every visual transformation, your group considers a company case study. Our Briefing is the perfect way to introduce and kick-off visibility in your organization.

SPECIFICATIONS

- SESSION.** The Briefing is about six hours in length, usually preceded by a walk-about visual assessment of your operations.
- GROUP AND GROUP SIZE.** The Briefing works well with at least ten employees attending but is scalable to 30, 70, or even 200 attendees.
 - Executives, managers, and supervisors usually attend as well as team leads, CI specialists, trainers, and union representation (if yours is a union shop.).
 - Please consider the assistance of an English-Polish translator to facilitate the discussion and the learning.
- MATERIALS.** Each participant receives a Briefing Manual.



- We encourage you to provide each attendee with a copy of Dr. Galsworth's Shingo Prize book, *Visual Workplace/Visual Thinking*, on which this briefing is based. (\$49 retail/book; \$35/book if bought under this proposal.) Let us know of your interest and we will have them shipped to you.
- We also recommend the distribution of Dr. Galsworth's other Shingo award-winning book, *Work That Makes Sense: Operator-Led Visuality*. Above rates apply.

DELIVERABLE B. BECOMING A LEADER OF IMPROVEMENT (BLI): A NEW ROLE FOR EXECUTIVES AND SUPERVISORS

Just as visuality can be used to build performance excellence in operations, so it can be deployed to help define, shape, and strengthen site and corporate leadership.

Company leadership is responsible for the corporate intent: finding, focusing, and driving strategic growth and tactical improvement. To do this, many executives, managers*, and supervisors* need to develop a fresh understanding of what effective leadership means and how to achieve it. They need to learn the principles and practices of *Visual Leadership*.



In our second VL4OE deliverable, we introduce your executives (from GM to CEO to site managers) and direct reports to their role as *Leaders of Improvement*.



As part of this, Dr. Galsworth defines the skills profile she has developed for executives as improvement leaders—and the associated profile for supervisors and managers. Each profile has seven core elements. Discussion anchors the learning.

SPECIFICATIONS

- SESSION.** The BLI session is delivered the day after the above 10-Doorway Briefing.
 - GROUP AND GROUP SIZE.** With this session, the VL4OE focus shifts to your executive/s and direct reports. Preferred group size ranges from 8 to about 18 active participants. Others may attend as observers.
 - MATERIALS.** Each participant receives a BLI Manual.
1. * In her visual leadership paradigm, Dr. Galsworth groups supervisors and managers together as implementers of the corporate intent.

DELIVERABLE C. VISUAL LEADERSHIP FOR EXECUTIVES: THE OPERATIONS SYSTEM IMPROVEMENT TEMPLATE (OSIT)



In many companies, the function of executives is often only partly defined and therefore not well understood, especially when operational excellence is a corporate objective. At the start, the executive needs to grasp the tight, dynamic relationship between the customer and improvement and the practical link between the company vision, mission, and values as well as other core elements of the strategic horizon.

That is the focus of the next VL4OE deliverable: *Operations Systems Improvement Template/OSIT*—an organizing framework designed to build and begin to operationalize a visual language of executive leadership that allows GMs, CEOs, and site managers to define, align, and drive methods and outcomes across the entire enterprise.

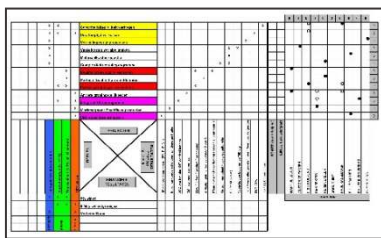
Many people who glance at the template (shown here) for the first time conclude that they already know it and understand it. Few do.

SPECIFICATIONS

1. **SESSIONS.** The OSIT content is presented across three sessions, with homework (action assignments) given at the conclusion of each (see *VL4OE Deliverables Grid* on page 4 for details).
2. **GROUP AND GROUP SIZE.** Preferred group size ranges from 8 to about 18 active participants. Others may attend as observers.
2. **NOTES AND HOMEWORK:**
 - a. Your ranking site and/or corporate executives are the focal point of the three OSIT sessions because the executive owns the OSIT. Direct reports typically attend as participant observers but session content and associated homework assignments target the needs, goals, and outcomes of the executive function. This division is meant to strengthen each role, not exclude them. See below for more.
 - b. If a version of this template is already in place, we ask the executive/s to develop his/her own OSIT version and then look for points of comparison and differences between them. In this way, the existing OSIT is de-constructed so that it can be validated for alignment and completeness and thereby more deeply owned.
 - c. Each of the three action assignments typically takes three to eight hours to complete, usually occurring across a span of three to six weeks. There is no rush. It depends on an executive's available time to think, consider, and draft.
 - d. This is highly personalized work, best undertaken directly by your ranking executive/s, with little or no input from others until *after initial drafts are in place*. Therefore, Dr. Galsworth asks each executive to work solo, with the option of inviting one other person to act as a sounding board. Dr. Galsworth coaches at-a-distance by phone and/or online.
 - e. Many executives find wisdom in assigning the same homework to direct reports as well, with the condition that each works with only one other partner and no one else. Team review and discussion are scheduled after that.
3. **MATERIALS.** Each participant receives an OSIT Manual.

DELIVERABLE D. VISUAL LEADERSHIP FOR EXECUTIVES: DEVELOPING THE X-TYPE MATRIX

Compelling, natural leaders are rare in any field, especially in industrial settings where priorities can change quickly and compete for resources and attention. In the next step of the visual leadership process, Dr.



Galsworth introduces your executives to a powerful visual framework for focusing and then driving key corporate outcomes that allows those executives to say *Yes* to the few (and know why) and *Wait* to the many (and know why).

This framework is *the X-Type Matrix*—a mechanism specifically designed to help executives clarify, align, and drive high-level strategic and tactical outcomes. Again, many profess an understanding of this tool. Results

demonstrate that few do.

In this and the next session, Dr. Galsworth presents and explains the elements and sections of the X-Type Matrix configuration in detail. It soon becomes clear how they work together to clarify and support an executive's core functions.

Your executives develop their own X-Type Matrices as their action homework assignment.

SPECIFICATIONS

1. **SESSIONS.** The X-Type Matrix Development deliverable is explained and delivered in two sessions.
2. **GROUP SIZE.** As above in OSIT.
3. **HOMEWORK:** As above in OSIT—your executive/s undertakes the development of X-Type Matrix solo, with the option of inviting one other person to act as sounding board. Dr. Galsworth coaches at-a-distance. As with OSIT, many executives find wisdom in assigning the same homework to direct reports as well, with the condition that direct reports work with only one other partner. Team review and discussion are scheduled as in above OSIT section.
4. **MATERIALS.** Each participant receives an X-Type Manual.

DELIVERABLE E. VISUAL LEADERSHIP FOR EXECUTIVES: DEPLOYING THE X-TYPE MATRIX

It is time for each executive to present his/her X-Type Matrix to direct reports for response and reaction. If direct reports have also undertaken the same homework, they present their matrices first. This discussion can prove a vital part of the shaping and alignment of a final X-Type that is ready for pilot. Galsworth and Bilinski observe these discussion, ready to coach, clarify, and reinforce in support of an effective real-time launch.

The matter of the how and the why of deployment now comes to the forefront of the discussion and the learning. Once launched, the X-Type becomes a field of dynamic learning, with regular coaching sessions.

In addition, we provide your executive/s with phone and online coaching/check-in/troubleshooting sessions as needed. We provide similar sessions for direct reports, with and without executive/s in attendance.

This pilot is an active period of integration that usually spans one to two quarters. During that time, the content of your executive’s X-Type Matrix is clarified and strengthened, tested and transformed. This is the purpose of the first cycle. The second cycle is a refinement process and part of *VL4OE Level.2 Maturity Process* (see below).

4.0. SUMMARY OF DELIVERABLES

The below *VL4OE Deliverables Grid* shows the products and services described in this proposal, provided by 4Results and Visual Workplace/Europe across five onsite visits.

VL4OE: ONSITE VISITS AND DELIVERABLES	NUMBER OF ONSITE DAYS	HOMEWORK
ONSITE VISIT 1		
DELIVERABLE A		
<i>Visual Site Assessment Scan</i>	Day 1	
<i>The 10-Doorway/Visual Thinking Briefing</i>	Day 1	
DELIVERABLE B		
<i>Becoming a Leader of Improvement: A New Role for Supervisors and Executives</i>	Day 2	
DELIVERABLE C		
<i>Visual Leadership for Executives: Developing an Operations System Improvement Template (OSIT: Part 1)</i>	Day 3	Homework
ONSITE VISIT 2		
HOMEWORK DISCUSSION AND REVIEW		
<i>OSIT: Part 1</i>	Day 1	
DELIVERABLE C (CONTINUES)		
<i>Visual Leadership for Executives: Developing an Operations System Improvement Template (OSIT: Part 2)</i>	Day 2	
DELIVERABLE C (CONTINUES)		
<i>Visual Leadership for Executives: Developing an Operations System Improvement Template (OSIT: Part 3)</i>	Day 3	Homework
ONSITE VISIT 3		
HOMEWORK DISCUSSION AND REVIEW		
<i>OSIT: Parts 2 and 3</i>	Day 1	
DELIVERABLE D		
<i>Visual Leadership for Executives: Developing the X-Type Matrix (Part 1)</i>	Day 2	
DELIVERABLE D (CONTINUES)		
<i>Visual Leadership for Executives: Developing the X-Type Matrix (Part 2)</i>	Day 3	Homework
ONSITE VISIT 4		
HOMEWORK DISCUSSION AND REVIEW		
<i>X-Type Matrix Development: Parts 1 and 2</i>	Day 1	
DELIVERABLE E		
<i>Visual Leadership for Executives: Deploying the X-Type Matrix (Part 1)</i>	Day 2	
DELIVERABLE E (CONTINUES)		
<i>Visual Leadership for Executives: Deploying the X-Type Matrix (Part 2)</i>	Day 3	Homework
ONSITE VISIT 5		
HOMEWORK DISCUSSION AND REVIEW		
<i>X-Type Matrix Deployment: Parts 1 and 2</i>	Day 1	
VL4OE INTEGRATION		
<i>BLI + OSIT + X-Type: Working Together</i>	Day 2	
VL4OE INTEGRATION CONTINUES AND NEXT STEPS PLANNING		
<i>BLI + OSIT + X-Type: Working Together</i>	Day 3	Homework

5.0. NEXT SET OF VISUAL LEADERSHIP DELIVERABLES AT-A-GLANCE (VL4OE LEVEL.2)

In our VL4OE approach to visual leadership, executive leaders first identify and resource the corporate intent; then they direct managers and supervisors to deploy it. This combination creates a vital connection between intended activity and needed outcomes in the enterprise.

The five deliverables described above (A THROUGH E) create a foundation for executive leadership that defines, aligns, and stabilizes—and allows the company to grow, even as it educates and grooms leaders on key organizational levels. That is their purpose. Effectively implemented, that is what they achieve. This is Level.1 of the process.

As these principles and practices become more active in your company, new methods and learning are needed to allow the leadership to mature, refine, and widen. The following are part of VL4OE Level.2 and continue the development of Dr. Galsworth's platform for growing and grooming leaders across the organization.

F. VISUAL LEADERSHIP FOR SUPERVISORS: VISUAL DISPLAYS & VISUAL SCHEDULING Supervisors develop and deploy management-by-sight

G. TEE-SHIRT ALIGNMENT: OPERATIONALIZING OSIT PRINCIPLES Embedding self-leadership into the daily life of your operations

H. VISUAL PROBLEM-SOLVING/VISUAL DEVELOPMENT Driving down the causal chain to robust solution-making

I. THE OPERATIONS ROADMAP Translating X-Type Matrix goals into daily operational outcomes



We are happy to discuss these opportunities with you when you are ready. Kindly let us know of your interest.

THANK YOU, FURTHER DISCUSSION, AND REFERENCES

Thank you for your consideration of our proposal. We value this opportunity to present our products and services to you.

Please let us know if you wish to discuss this opportunity further, including your interest in a conversation with us online.

In addition, we are fortunate to count many satisfied companies across an array of industries in our client base. While clients have asked us to guard their time closely, most are willing to serve as reference points to organizations genuinely interested in our products and services.

We would be happy to arrange for such contact when you are ready. We are here to help.



IREK BILINSKI

PARTNER/CEO/PRESIDENT OF THE
BOARD OF QRM CONSULTANTS

THE 4RESULTS GROUP

WARSAW, POLAND

MOBILE: +48 504 144 110

EMAIL: IREK.BILINSKI@4RESULTS.PL



Gwendolyn D. Galsworth, PhD, is president/founder of *Visual Thinking Inc.* and *The Visual-Lean Institute®* (collectively “VTI”). Dr. Galsworth formed her company in 1991 as a consulting, training, and research firm, specializing in the technologies of the visual workplace. Since then, she has focused on codifying the field of visuality into a single coherent framework of thinking and application.

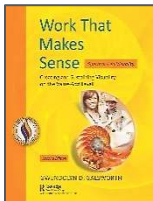
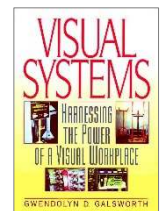


Track	Track Content/Courses
Track 1	Visual Workplace/Visual Thinking Briefing + Pre-Launch Planning
Track 2	Visual Order/Visual Inventories Implementation Suite
Track 3	Work That Makes Sense: Operator-Led Visuality
Track 4	Becoming a Leader of Improvement (LII) - Management by Sight New Role for Supervisors & Managers - Visual Displays/Control Boards
Track 5	Visual Machine - Implementation Suite
Track 6	Becoming a Leader of Improvement (LII) - Problem Solving & Operator Creating a Business Systems Template - Visual & On-line Visual Map
Track 7	Visual-Lean® Office Implementation Suite
Track 8	Becoming a Leader of Improvement (LII) - Visual Problem-Solving Visual Memory/Visual Boards - Visual Standard-Making
Track 9	Visual Adherence - Achieving Zero Defects: Visual Execution Visual Standard/Visual Control - Achieving Zero Defects: Visual Execution Poka-Yoke

In 2005, Dr. Galsworth established the Visual-Lean® Institute where in-house trainers and external consultants are trained and licensed in nine core visual workplace courses—including Work That Makes Sense/Operator-Led Visuality, Visual Displays, Visual Machine®, Visual-Lean® Office, and Visual Leadership. In this way, they can train and implement these methods in their own companies (or with their clients) and achieve a fully-functioning, self-sufficient visual enterprise. VTI conducts seminars, workshops, and train-the-trainer events in the USA and globally.

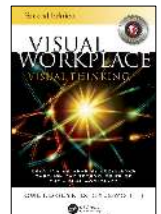
Dr. Galsworth’s abiding focus is in helping companies all over the world accelerate their rate of visual transformation, build and/or strengthen cultural alignment, and achieve long-term, sustainable bottom-line results. Her clients include: Lockheed-Martin, Hamilton Standard, Pratt & Whitney, Hitchcock Industries, Royal Nootboom Trailers/Holland, Crown Equipment/Mexico, Trailmobile/Canada, Parker Denison, Rolls-Royce/UK, TVS Sundaram Clayton/India, Crompton Greaves/India, Sears Home Services, United Electric Controls, and Wilson Transformer/Australia.

Dr. Galsworth is continually transforming her onsite discoveries into new knowledge and know-how in the form of visual workplace methods, models, and constructs in order to better assist companies on their journey to operational excellence. Many of her methods are now available as online training systems, fully designed and narrated by Dr. Galsworth. Her *Work That Makes Sense Training System*, for example, is a 13-module process for operator-led visuality (in English and Spanish). Also *Mistake-Proofing for Perfect Quality*, created in collaboration with Dr. Martin Hinckley, NASA scientist and author of *Make No Mistake*.



Recognizing the fit between The Shingo Prize and workplace visuality, Robert Miller, former executive director of The Prize, put it this way: *“The visual workplace, as taught by Gwendolyn Galsworth, is in perfect harmony with the model of Operational Excellence represented by The Shingo Prize. The concepts, tools, and methods of visuality are essential as we pursue other guiding principles of seeking perfection, quality at the source, and the continuous flow of value to customers.”*

Dr. Galsworth is a Faculty Fellow at the Shingo Institute and author of seven books on workplace visuality and strategic improvement. Her ground-breaking book, *Visual Workplace-Visual Thinking* (now in second edition), contains 200 visual solutions, and provides a complete foundation in her visual principles, practices, and 10-Doorways model. *Work That Makes Sense: Operator-Led Visuality* (now in second edition) contains over 500 full-color visual solutions and provides a step-by-step process that operators follow to convert their work areas to visuality that is sustainable. Both books are winners of the prestigious Shingo Prize.



Her book on the cost of complexity, *Smart Simple Design/Reloaded*, takes a hard look at the costs and challenges of product diversification. In it, she maps out the *Variety Effectiveness Process (VEP)*, a proven method for de-complicating the organization by simplifying product architecture and dismantling layers of embedded complication that choke a company’s infrastructure and product design process. Once VEP is effectively applied, the need for both visual and lean is significantly less urgent. Galsworth’s books are available globally from our website (www.visualworkplace.com) and on Amazon, in print and on Kindle.



Dr. Galsworth’s career in operational excellence began as the head of training and development at Productivity Inc. in the early 1980s. There she worked closely with Dr. Ryuji Fukuda to adapt the CEDAC® method for western audiences—and with Dr. Shigeo Shingo to develop, among many things, *poka-yoke* as an implementation methodology for the West. While there, she was also principal developer and implementer of *Visual Factory*, *TEIAN* (operator-led suggestion systems), and *Hoshin Kanri/X-Type Matrix Planning* (policy deployment). She was a Baldrige Examiner and Shingo Prize Examiner for many years and Senior Fellow at the Center for Competitive Change at the University of Dayton’s Business School for a decade.

Galsworth holds a Ph.D. from Indiana University, has led study missions to some of the world’s finest companies, including in Japan, and is a frequent keynote speaker. Dozens of podcasts from her radio show, *Visual Workplace Radio*, and over 100 articles from *The Visual Thinker* Newsletter can be found on her website, www.visualworkplace.com. See Wikipedia for more.

While she still has an active array of US clients, Gwendolyn Galsworth recently moved to Poland to establish *Visual Thinking-Europe* in partnership with *4Results*. You can reach her through *4Results* or through contact@visualworkplace.com. ☐