

Boards Best Practices

It's important to set up your Boards to support your Users for their unique needs and responsibilities in KaiNexus. That's why we build Boards based upon Persona. Here are some examples and tips for creating an engaging Board!

KaiNexus

Frontline Board

The screenshot displays a 'Frontline Board' interface with several sections:

- Have an Idea?**: A green header with a 'Submit Here' button.
- The Impact of My Ideas**: A summary card showing 'Ideas Submitted: 35', 'Financial Impact: \$0.00', and 'Hours Saved: 0h'.
- Need Help?**: A card with a 'Visit the KaiNexus' link and 'KaiNexus Training Board'.
- (11) My Ideas**: A list of idea cards, including 'Always Have Someone at the Registration Table', 'Kick off the conference with a video', 'Use Canva Premium for Slides', and 'Do a condensed product roadmap at the beginning'.
- (92) My Assigned Items**: A list of assigned items, including 'Podcast Advertising', 'Marketing Swag', 'Marketing collateral for Healthcare', and 'Indiana Lean Healthcare Summit 2022'.
- (0) My Overdue Items**: A red header card indicating 'No results matched your filters.'
- (3338) My Location's Items**: A Kanban board with columns for 'New', 'Planned', 'Active', 'Overdue', 'Resolution Submitted', and 'Complete'. Each column contains task cards with details like status, due dates, and responsible parties.

'My Location's Items' Kanban Card

The tasks your Location submits can appear on the Location's Kanban Card. Quickly see what Items your Location is working on and what is overdue. Tracking the statuses of Items is crucial for success in KaiNexus.

Additional Resources

Keep all of your important resources in one place. Embed links, files, images, and videos directly to your Board using a freestyle card. This card type is useful for posting announcements, instructions, or other important resources like training videos that you regularly access.

Idea Submission Button

You want to make improvement easy and accessible for your frontlines. One way to do that is by adding a submit button to the top of your frontline Board. This visual cue will help your employees build a habit of submitting ideas.

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Leader Board

The screenshot displays a comprehensive dashboard for a 'Leader Board'. At the top, there are three main sections: 'Have an Idea?' with a 'Submit Here' button, 'My Location's Impact, YTD' showing 381 Ideas Submitted, \$0.00 Financial Impact, and 0h Hours Saved, and 'Need Help?' with a link to 'Visit the KaiNexus KaiNexus Training Board'.

Below these are three rows of cards. The first row includes 'Items Requiring Assignment' (1375), 'Items with Resolution Submitted' (6), and 'Stagnant Items' (1983). The second row features 'My Team's Activity' with a bar chart showing activity from Nov 2022 to Apr 2023, and 'My Team's Status' with a table of user performance.

The 'My Team's Status' table is as follows:

User	Total	Change (%)	Status Bar
Laura Ham	1,323	56%	[Progress Bar]
Emily Kauten	954	23%	[Progress Bar]
Matt Banna	913	97%	[Progress Bar]
Linda Vicaro	702	100%	[Progress Bar]

The bottom section, 'My Location's Items', is divided into six columns representing different statuses: (90) New, (168) Planned, (82) Active, (1) Overdue, (0) Resolution Submitted, and (2997) Complete. Each column contains a list of items with details like status, creation date, and author.

Items that Need your Attention

Get a quick snapshot of the health of your improvement culture by skimming the bottleneck cards on this board. These cards are a quick visual tool for you to see where the bottlenecks are developing in KaiNexus, so you easily know where to focus your coaching efforts.

A few different bottleneck cards you can use are Items Requiring Assignment, Items with Resolution Submitted, and Stagnant Items.

Team Activity

The reports section on this board can be customized to show which reports are most relevant for you and your organization.

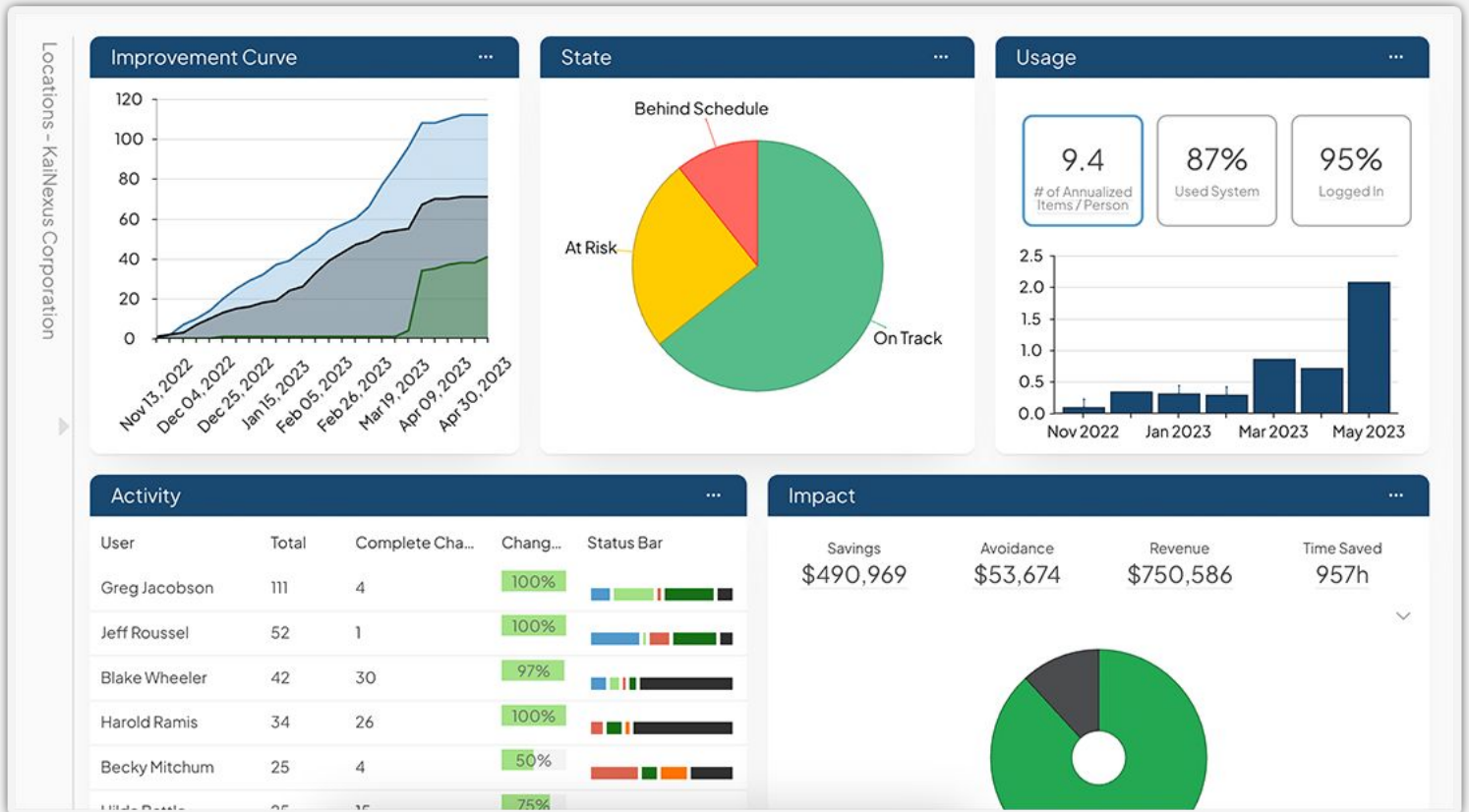
Activity Over Time and Activity by Person are excellent reports for quickly understanding activity and engagement trends. Additionally, many people find value in easily monitoring their impact for easy reporting, while others may prefer to swap this report for an attribute or user engagement summary.

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Executive Board



Reports

Display any Activity, Engagement, Impact, or Attribute Report on a Board for your Executives to easily view. In one location evaluate the health of the organization's improvement culture by tracking:

- Submission and completion rates
- Average number of improvements submitted per person
- The cumulative outcomes and impacts of your organization's Items
- and more.

Location Filter

You can apply a Location Filter to an entire board. Instead of building a separate board for each location, the Location Filter allows you to build and maintain one board that displays data across separate locations and includes the Location Filter on the left-hand side of the board.

You can use this to allow executives to see the progress of your CI efforts across various locations with a simple click on the network location.