



# KaiNexus Year in Review & Product Roadmap

**KaiNexus**



**Ryan Rippey**  
Director of Product



**Kade Jansson**  
Product Manager



**Noah Paratore**  
Product Manager



# Meet the Presenters



RYAN **RIPPEY**



KADE **JANSSON**



NOAH **PARATORE**



# 2024 - By the Numbers

**6 Releases**

**243 Enhancements**



# Code Commanders

Development  
Product  
Testing



# 2024

## Year in Review



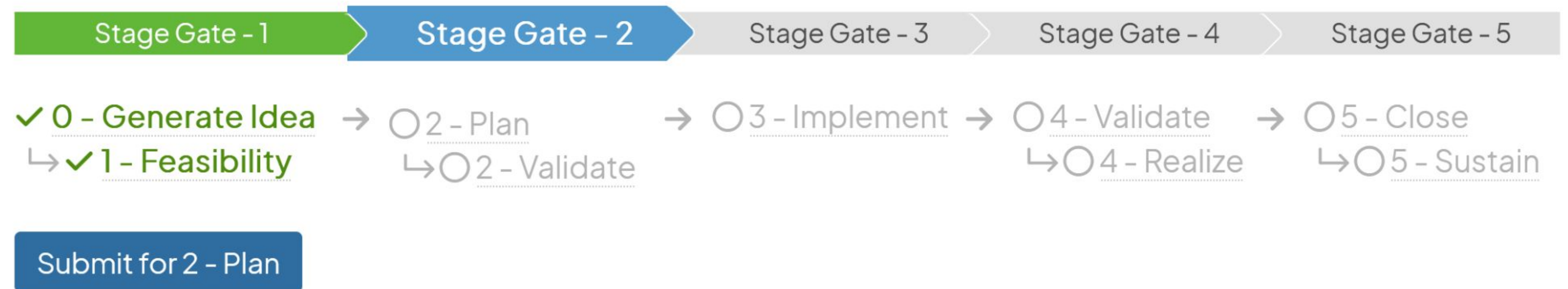
# 2024

## Stage Gates



# Stage Gates

## Stage Gates





# Milestone Reporting



# Milestone Reporting

- **Cycle Time** by Milestone
- **Activity** by Milestone
- **Impact** by Milestone

Cycle Time by Milestone

Milestone	Total ⓘ		Not Ready ⓘ		Overdue Ready Deadline ⓘ		Ready ⓘ		Overdue Approval Deadline ⓘ	
	Avg Days	#	Avg Days	#	Avg Days	#	Avg Days	#	Avg Days	#
Plan	14.3	16	6.7	6	5.2	12	5.2	6	5.2	5
Do	16.9	12	4.2	5	9.3	10	3.9	3	10.1	14
Check	22.5	33	3.3	10	9.1	5	4.2	6	7.3	12
Adjust	18.2	23	3.3	5	5.2	6	8.1	2	4.2	10



# 2024

## Custom Statuses



# Custom Statuses

IN PROGRESS ▼

CLOSED ▼

AWAITING SIGN-OFF ▼

OFF TRACK ▼

PENDING ▼


OPEN ▼

DONE ▼

ON TRACK ▼

RESOLVED ▼

CANCELLED ▼




 Historical Data Tracking #861

Reports ▼

+ Add ▼

Actions ▼

ACTIVE: ON TRACK ▼



Details

Resolution

Comments

Timeline

Other

Details

Milestones

L1

L2

L3

☐ Ideation

→ ☐ Implement

→ ☐ Validation

☒ Leadership Sign-off

Submit for Ideation

Strategic Initiative

☒ Quality

☐ Mission and Culture

☐ Safety

☐ Finance



# Smart Templates & Workflow Automation



# Field, Attribute & Due Date Syncing

## (4) Prioritization

Title

Priority

▼ 📁 Make KaiNexicon 2024 the best one yet!

↓ Low

💡 Invite amazing people

↑ High

💡 Show off amazing features

→ Medium

💡 Host in an amazing city

↓ Low



# Conditional Attribute Values

Create A3

Theme:

Greetings KaiNexiconians!

+9+

Strategic Initiative:

Optional

Category:

Optional


Background:


What details can you provide about this issue?

Create

Save as Draft

Cancel







## Conditional Panels

#5941

Reducing Patient Backlog

Reports

+ Add

Actions

Remind

Print/Save PDF

NEW

A3

8D

Capacity

Resolution

Fishbone

Comments

Tasks

Charts

Timeline

Other

Details

Strategic Initiative

Quality

Category

Healthcare

PDCA?

No

Priority

High

Toolbox

None



# Conditional Tabs

Reducing Time to Close Improvement Items

#7379

NEW

Project Details

Resolution

Comments

Nested Items

Timeline

Other

Problem Statement

The average time to close an improvement item is 45 days, which is delaying the realization of benefits and causing backlog.

DMAIC Phase

None

Category

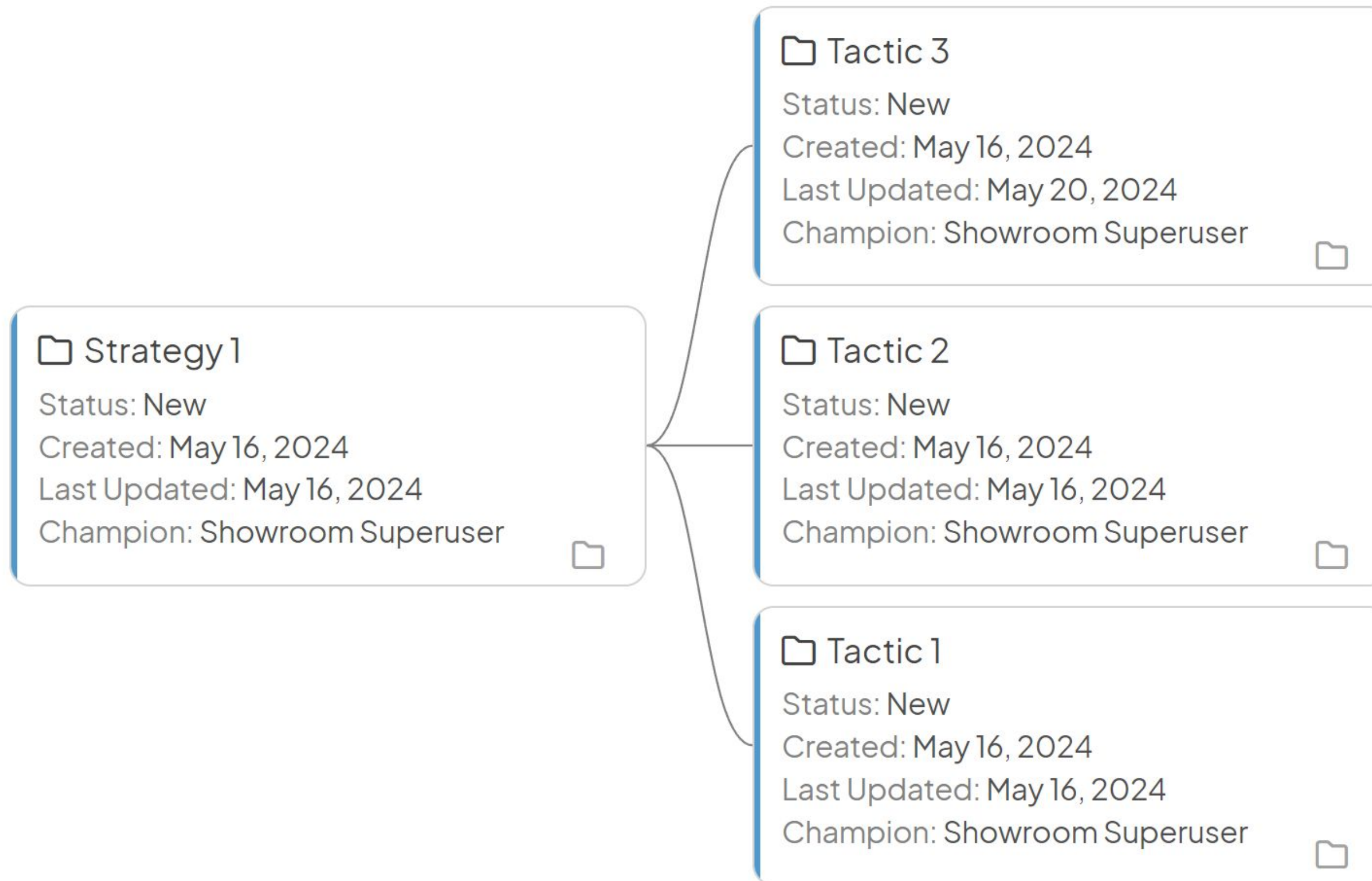
Regulatory Compliance



# Hierarchy View

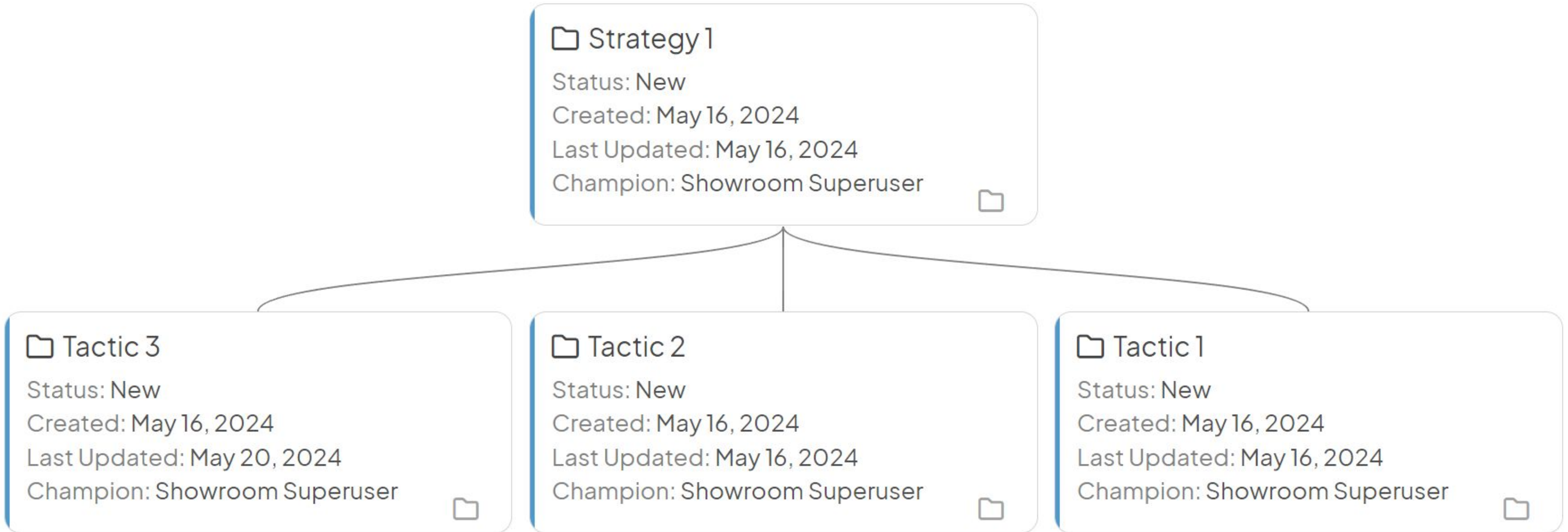


# Hierarchy View





# Hierarchy View



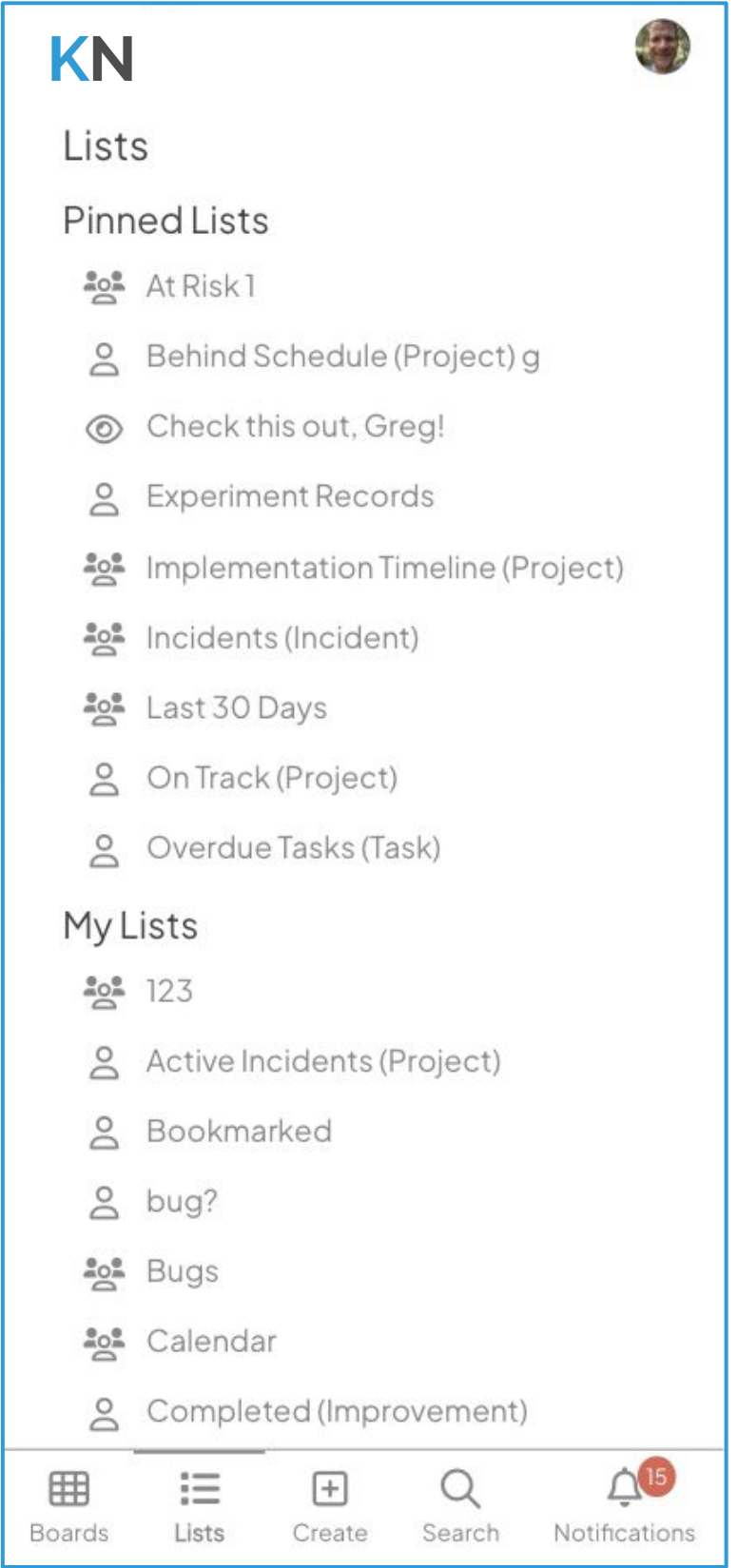
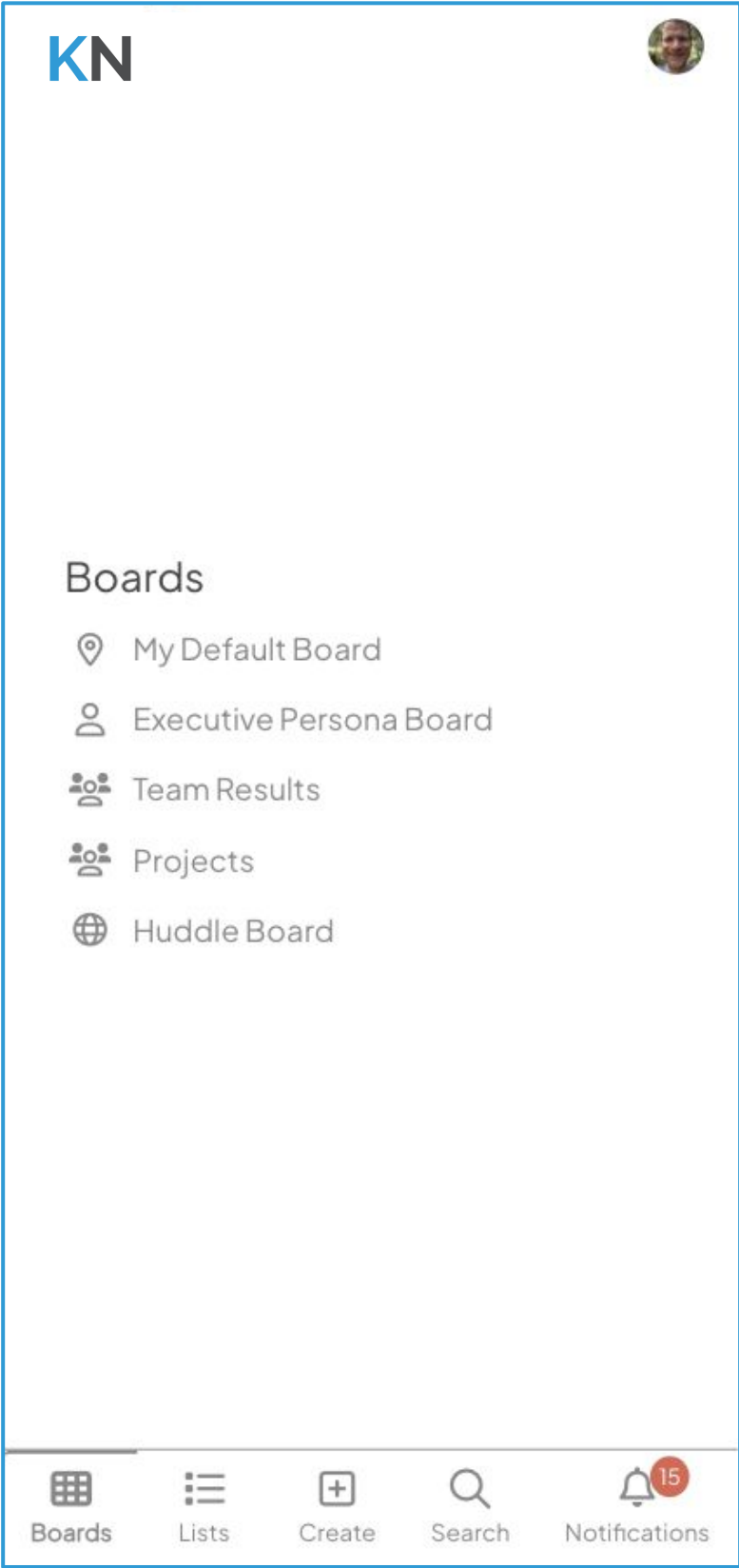


# 2024

## Mobile



# Mobile Enhancements





# Mobile Enhancements

Reduce Paper Usage

#128

Save on Materials

NEW

All

Resolution

Images

Comments

Charts

Timeline

Details of Project

Purpose

Supplies & Waste

Scope

On an annual basis, we spend \$50,000 on paper that is mostly thrown away. During your day, be on the lookout for ways that we can reduce or eliminate paper from a process.

Category

Improve Morale, IT

Strategic Initiative

Quality

Project Phase

None

Priority

Low

Originating Location(s)

Responsible Location(s)

Item

Link

Standard Work

Scores

Greg Jacobson

25

View Activity

View Badges

Username:

greg

User Type:

General

Persona:

Executive

Network Location:

KaiNexus Corporation, Team A

Language:

English

Roles:

Assign, ISuperuser

Group:

All

Create Amazing Project

Name:

Reduce Inpatient Time

Description:

Optional

Category:

Optional

Strategic Initiative:

Optional

Parent:

Optional

Make Private

Status & Team

New

Planned

Active

Deferred

Sponsor(s):


Optional

Facilitator(s):

Greg Jacobson (Myself)

Sidekick(s):

Required

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# KaiNexus Mobile

Get Started and Download the App Today!



Apple App Store



Google Play Store



# 2024 Monthly Summary Email



# Monthly Summary Email

KaiNexus

## Monthly Summary

### Activity

Items Submitted

100

▲ 1.00%

Items Completed

40

▲ 7.14%

### Engagement

Users Logged In

50

▲ 71.64%

### Impact

Financial Impact

\$12,985

▲ 2.94%

Time Saved

60h

▼ 8.75%

[VIEW MORE](#)



# 2024

## Private Fields



# Private Fields

## Private Fields

Top Secret - Burn after Reading

 Private - Click to reveal



# 2024

## Team Roles



# Team Roles

- Define each Team Role as single or multi-select
- Require any Team Role on Submit, Plan, or Activate
- Show empty Team Roles
- Define which Team Role updates Responsible Location



# 2024

## Cycle Time



# Status History

## Status History



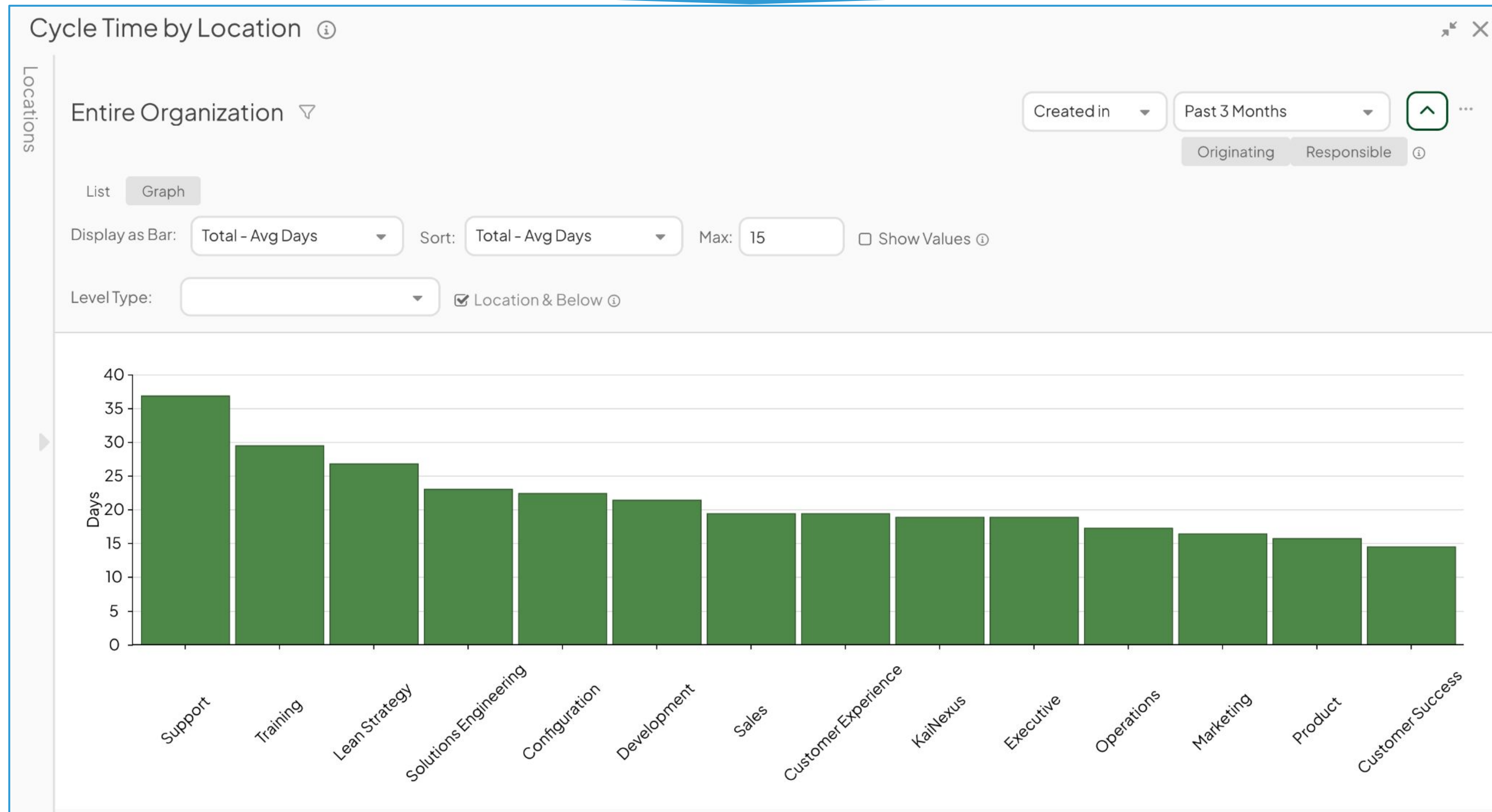
Status	Start Date	End Date
New	Mar 27, 2024 3:18 PM	Apr 10, 2024 1:58 PM
Planned	Apr 10, 2024 1:58 PM	Jan 01, 2025 12:00 AM
Active	Jan 01, 2025 12:00 AM	Feb 20, 2025 12:00 AM
Resolution Submitted	Feb 20, 2025 12:01 AM	Feb 21, 2025 12:00 AM
Complete	Feb 23, 2025 12:00 AM	
+ Add Status		

Save

Cancel

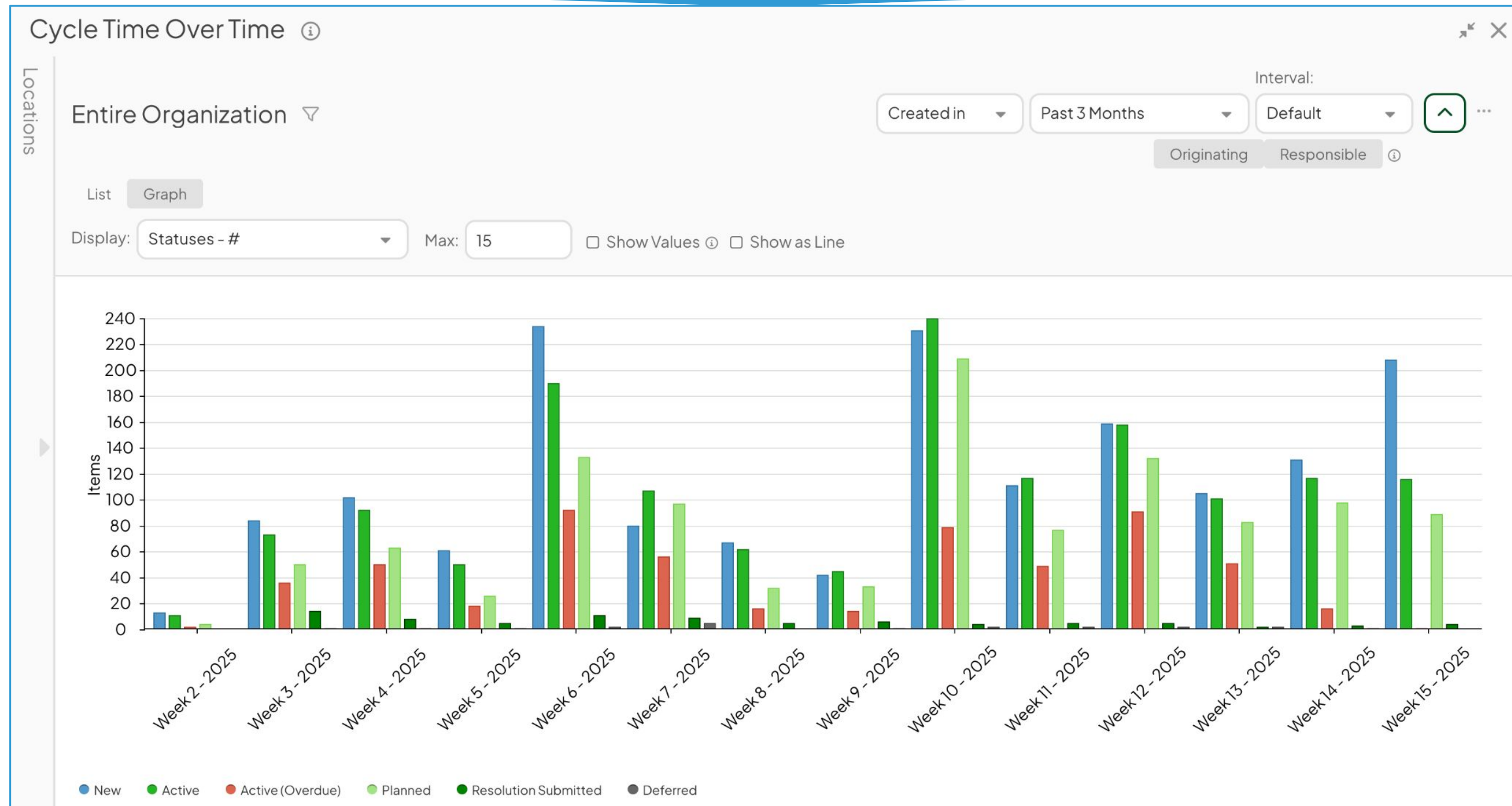


# Cycle Time Reporting





# Cycle Time Reporting





# 2024 Recap



## 2024 Recap

- Private Fields
- Custom Statuses
- Smart Templates & Workflow Automation
- Team Role Refractor
- Cycle Time Refractor
- Stage Gates & Milestone Reporting
- Hierarchy View
- Mobile
- Monthly Summary Email

And over **200** more enhancements!

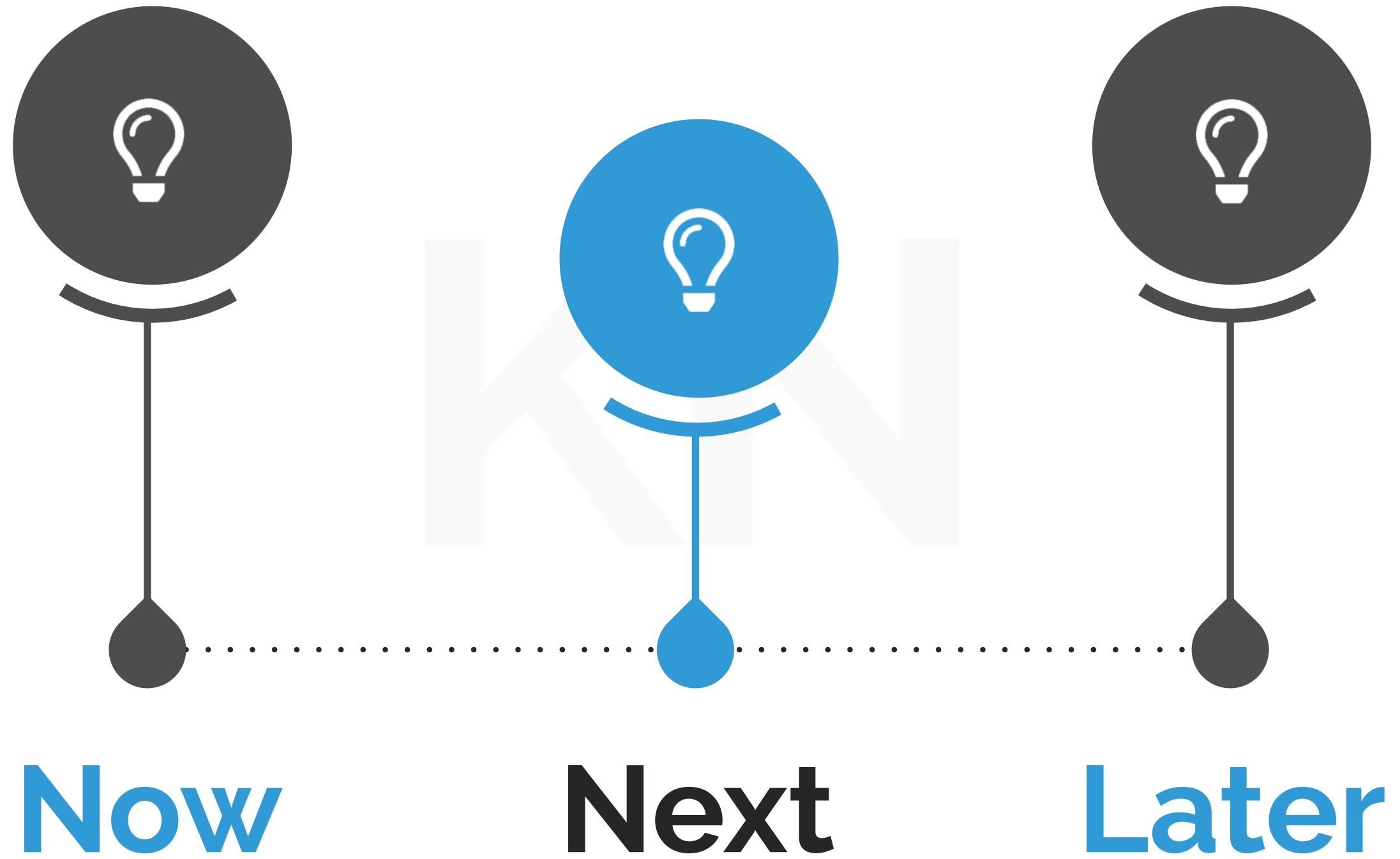




# Product Roadmap



# Agenda









Now

v 3.2.5



# Now: Habit Score

## Habit Routine ✕

Select the activities to achieve on a weekly basis. Enabled activities define the routine and provide the basis for the Habit Score.

☒ Select All (Recommended)

☒ Sign In ⓘ

☒ Use System ⓘ

☒ Clear a Notification ⓘ

☒ Comment on, Like, or Acknowledge an Item ⓘ

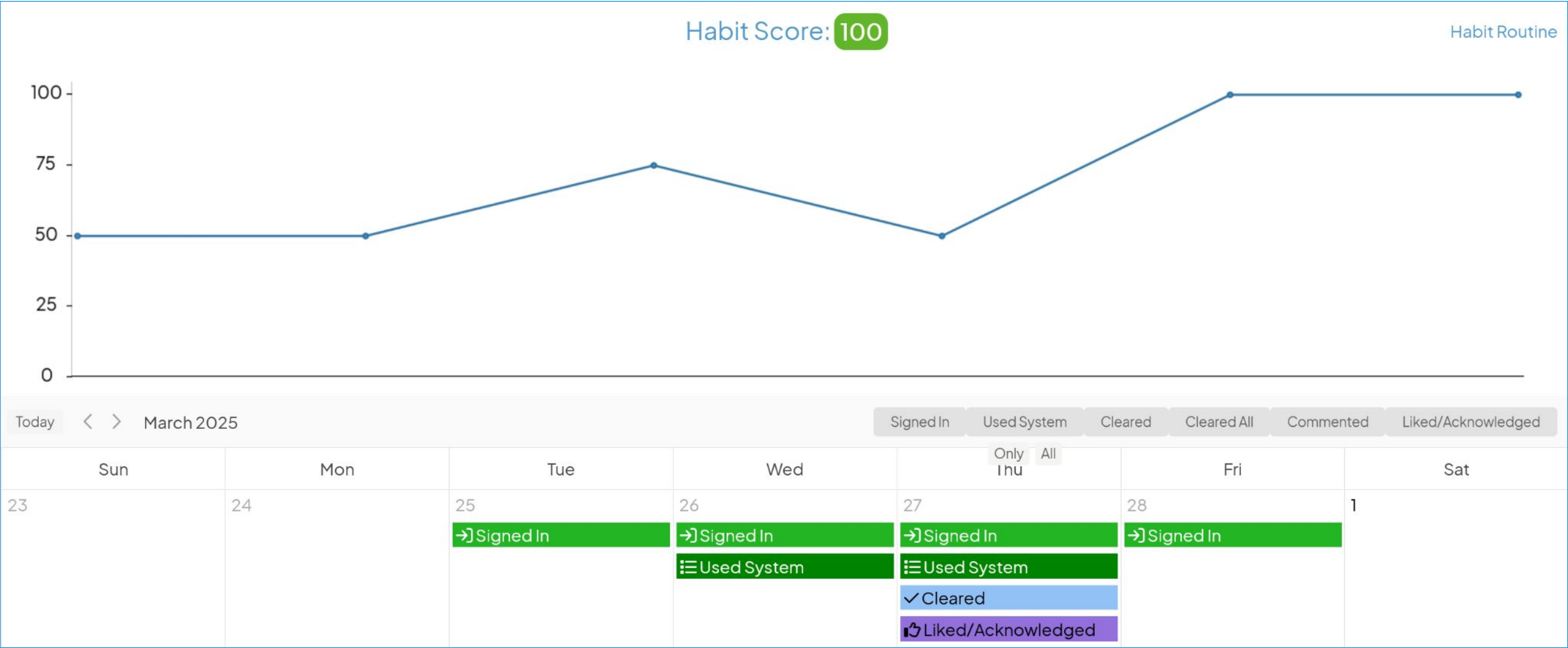
☒ Send me a weekly email with my latest Habit Score

Save

Cancel

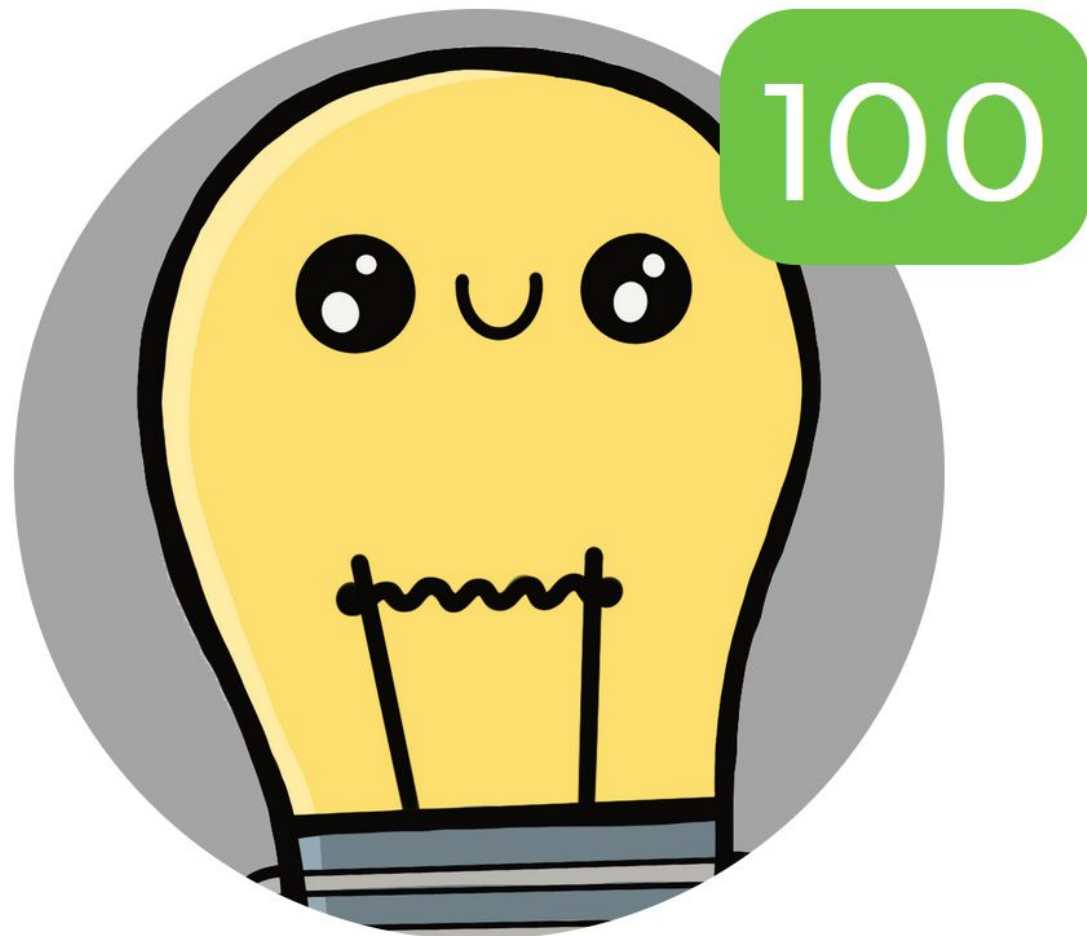


# Now: Habit Score





# Now: Habit Score



## Habit Score Widget

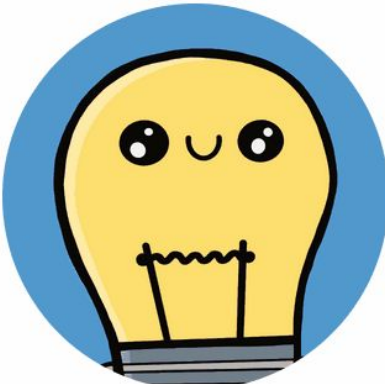
Ofie's Habit Score





100



# Now: New Badge Features

Ofie Ofierson





View Badges

Award Badge ▾

View Activity

Username: ofie

User Type: General

Network Location: KaiNexus Corporation


Language: English

Roles: Superuser

Group: All

Actions ▾

Last Login: Apr 09, 2025 5:10 PM | Last Updated: Apr 09, 2025 5:10 PM

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# Next



Next

v 3.2.6



# Next: Engagement from a List

## (4) My Projects

💡 Hazardous materials process

💬 👍 ✅ Status: New Created: sep 10, 2024  
Last Updated: abr 08, 2025 Author: Brett Johnson

💡 Information not transferred

💬 👍 ✅ Status: New Created: oct 28, 2024  
Last Updated: nov 12, 2024 Author: Hector Sanchez

💡 Recommend 3Ds

💬 👍 ✅ Status: New Created: oct 31, 2024  
Last Updated: nov 23, 2024 Author: Blake Wheeler

💡 Room not getting cleaned

💬 👍 ✅ Status: Planned Due: nov 03, 2024  
Last Updated: nov 24, 2024 Author: Blake Wheeler

## (4) My Projects

Title	Engagement	State	Key People
💡 Hazardous materials process	💬 👍 ✅	● On Track	Author: Brett Johnson
💡 Information not transferred	💬 👍 ✅	● On Track	Author: Hector Sanchez
💡 Recommend 3Ds	💬 👍 ✅	● On Track	Author: Blake Wheeler
💡 Room not getting cleaned	💬 👍 ✅	● On Track	Author: Blake Wheeler



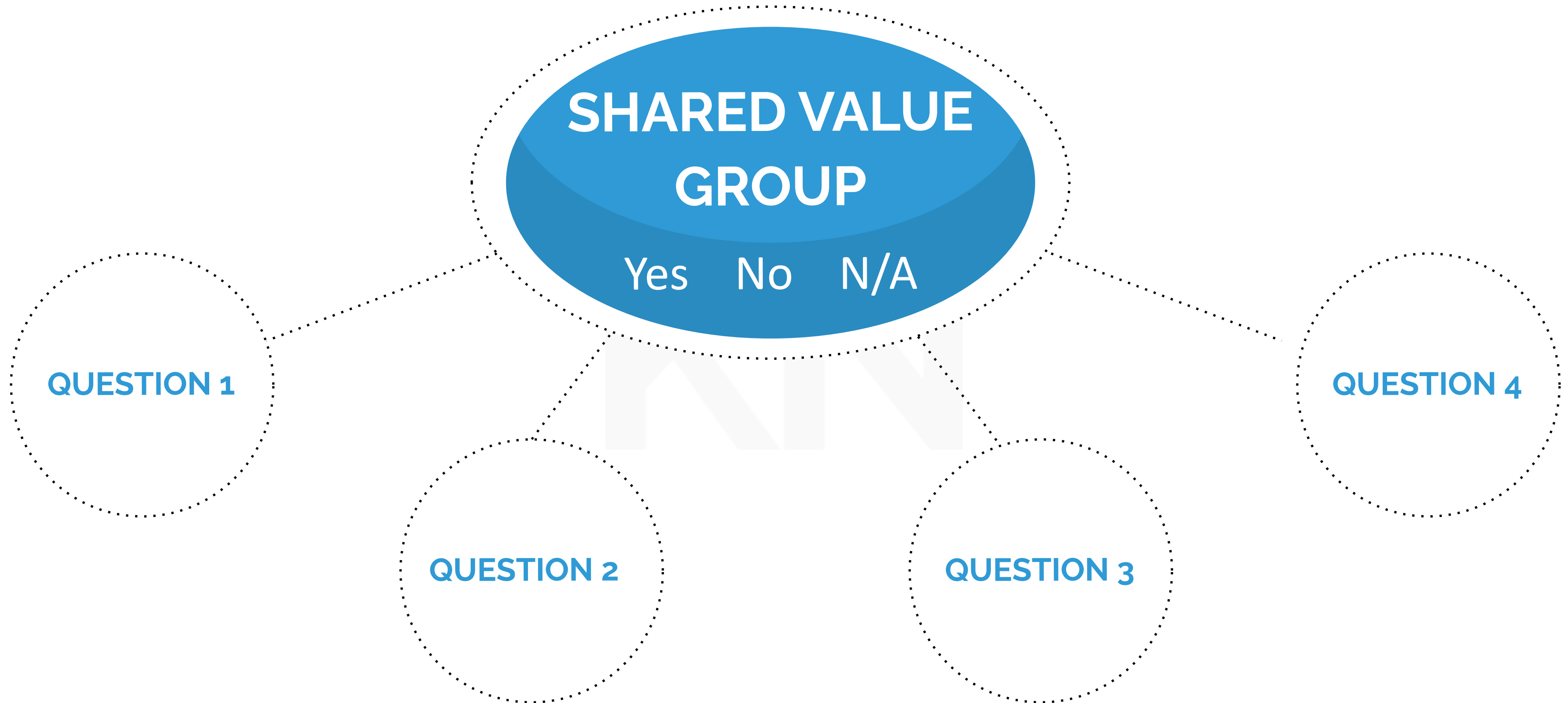
## Next: File & Link Enhancements

- **New Files and Links list columns**
- **Increase file attachment size to 50 MB**

(1) My Projects		
Title	Files	Links
💡 Hazardous materials process	<div>📄 Presentation.pdf</div> <div>📄 Research Data.xlsx</div>	<div>🔗 Search Results</div> <div>💡 Room not getting cleaned</div>

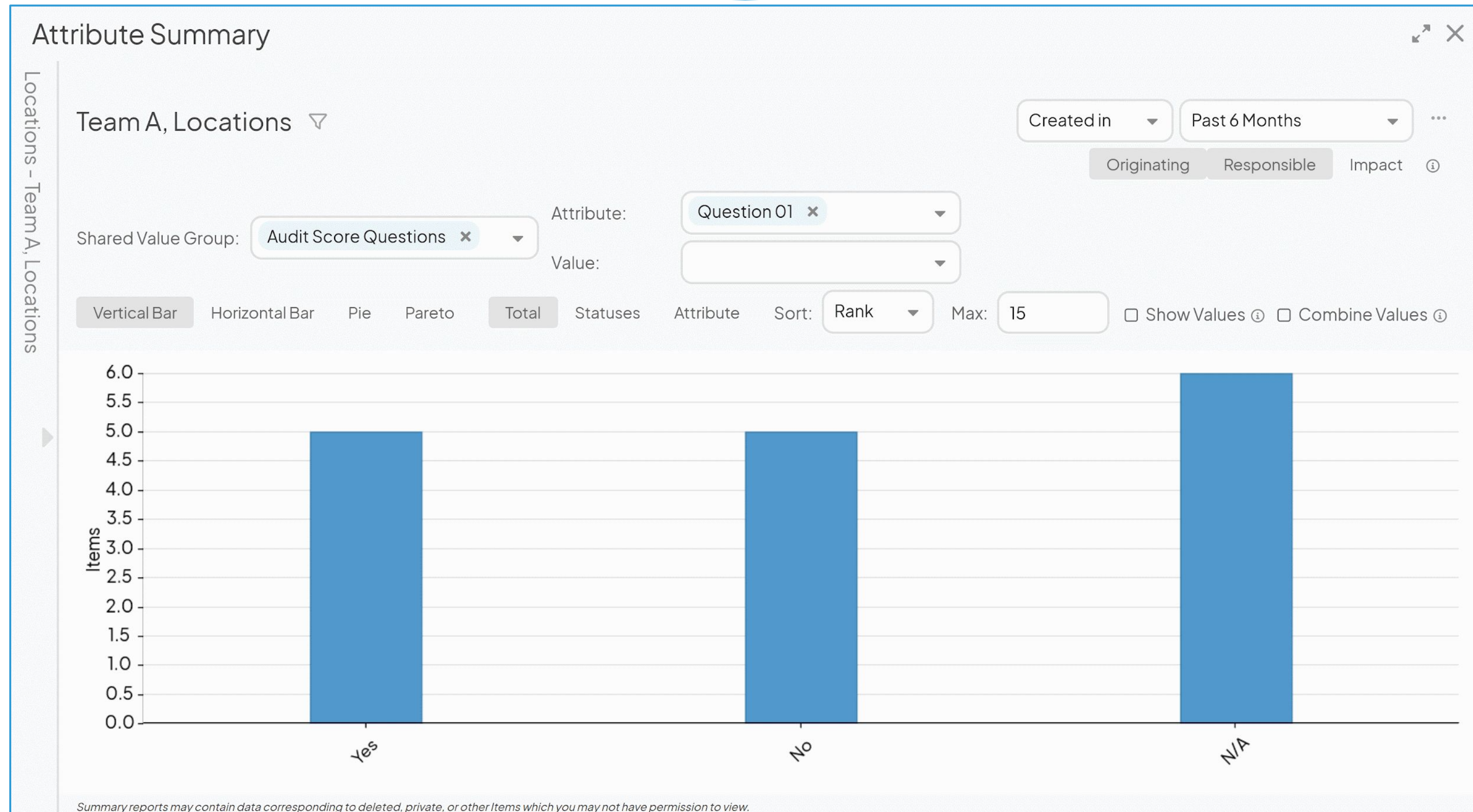


# Shared Values



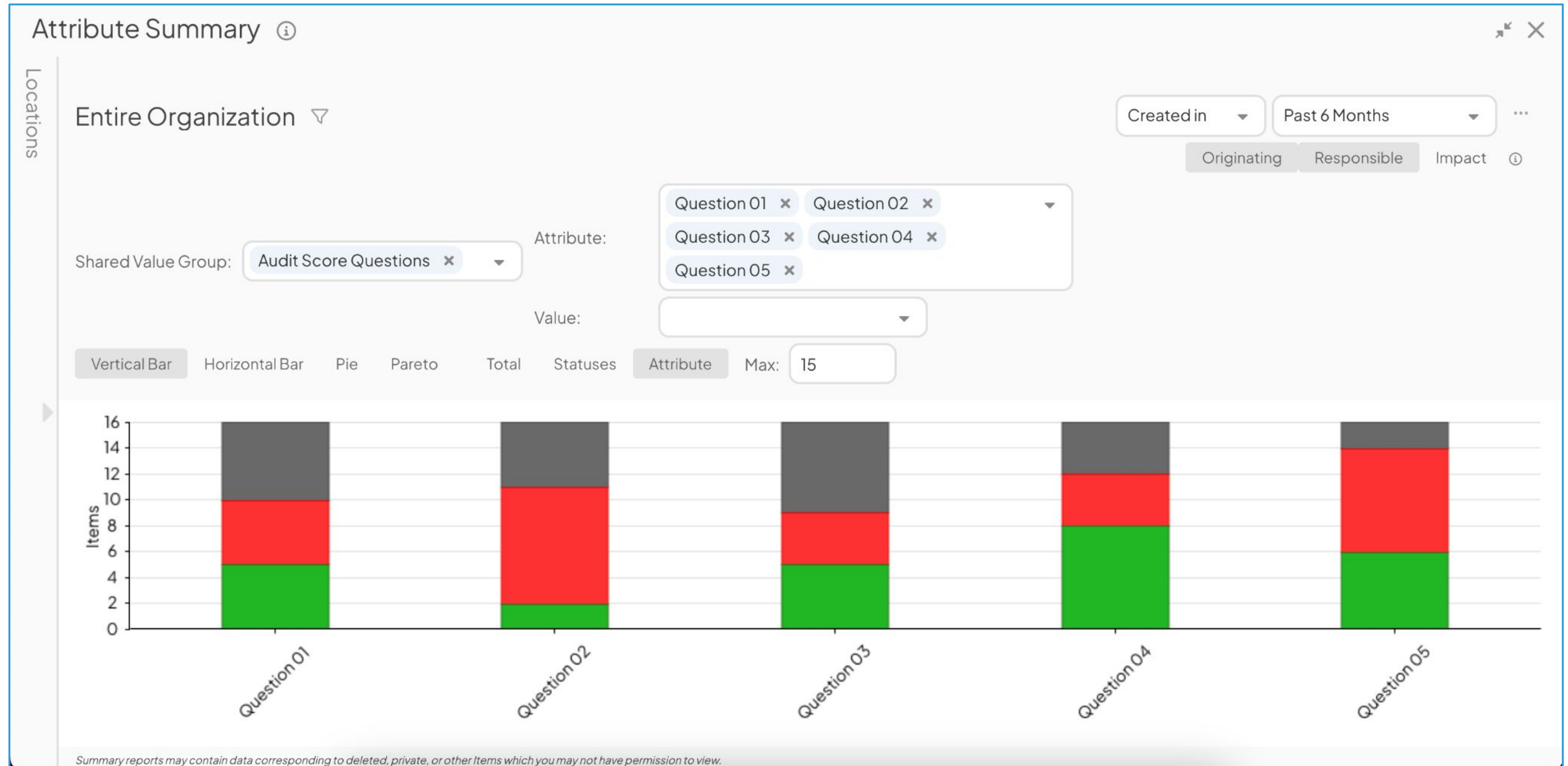


# Attribute Report Enhancements





# Attribute Summary Enhancements





# Next: Milestone Location Activation

Hazardous materials process

#193

NEW

Improvement

Resolution

Comments

Tasks

Timeline

Other

Locations

Originating Location(s)

Executive

Responsible Location(s)

Corporate

Milestones

No Milestones have been added.

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# Next: Starred Locations

Level Type

☒ Location & Below ⓘ

^

▼

▼ ★ Starred

● Austin

★

● Dallas

★

● Seattle

★

▼ 🏢 KaiNexus Corporation

▼ 🏢 Corporate

🏢 Accounting

🏢 Customer Experience

▶ 🏢 Development

🏢 Executive

🏢 Human Resources

🏢 Marketing

🏢 Product Management

Originating Location(s): ⓘ

Austin ✕

Start typing to search...

My Locations

● Austin

☆

Starred Locations

🏢 Executive

★

🏢 Corporate

★

🏢 KaiNexus Corporation

★

Recent Locations

● Dallas

🔧 Production

🏢 Product Management

🚚 AM Shift









# Capacity Planning



# Capacity Planning

Greg Jacobson



Username: greg  
User Type: General  
Persona: Executive  
Network Location: KaiNexus Corpora  
Roles: Superuser

Actions ▾

- Edit Profile
- Change Password
- Capacity Settings

## Capacity Settings - Greg Jacobson

Capacity Category	Description	Max Capacity	UOM	Last Updated
Continuous Improvement	Employee submitted improvements	10	# of Items	05 Sep 2023
Strategy	Projects prioritized by leadership	8	Hours per W...	05 Sep 2023

Save Cancel

## Edit Team

☒ Enable Capacity Tracking

Author(s):

Kade Jansson x ▾

Responsible: ⓘ

Start typing to search... ▾

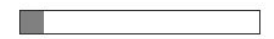
Current Commitment

Current Capacity

Kade Jansson - kade

2

Hours per Week



Assigned By:

Kade Jansson x ▾

Responsible Location(s): ⓘ

KaiNexicon 2023 x ▾

Collaborator(s):

Start typing to search... ▾

Current Commitment

Current Capacity

Greg Jacobson - greg

3

Hours per Week



Follower(s):

Preview Only—Not Yet Available



# Capacity Planning





# Capacity Planning

Status	Title	Capacity - Strategy
New	💡 Hello	<b>Collaborator</b> Adam Hamed (0%): 0 hours Amelia Bridges (63%): 25 hours Blake Wheeler (0%): 0 hours Grant Austin (27%): 8 hours Greg Jacobson (0%): 0 hours Jeff Roussel (0%): 0 hours
Planned	📁 Review Audit Process	<b>Facilitator</b> Karen Rogers (0%): 0 hours  <b>Project Sponsor</b> Heath Shuler (800%): 40 hours  <b>Team Leader</b> Jan Reijnvaan (20%): 12 hours

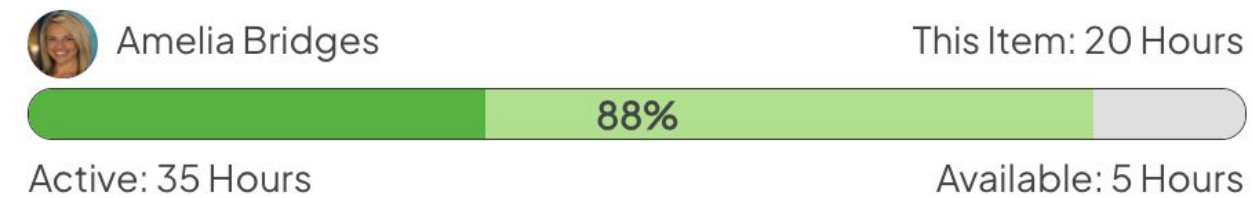
Preview Only—Not Yet Available



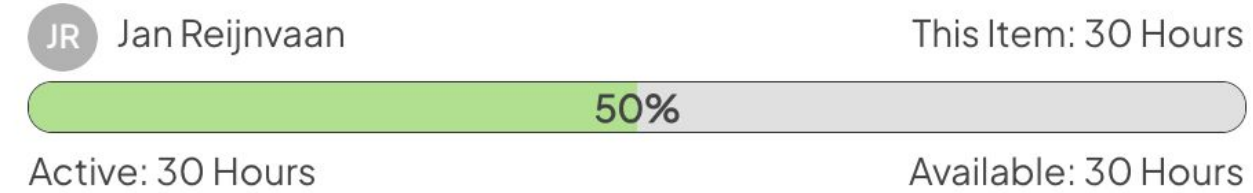
# Capacity Planning

## Team

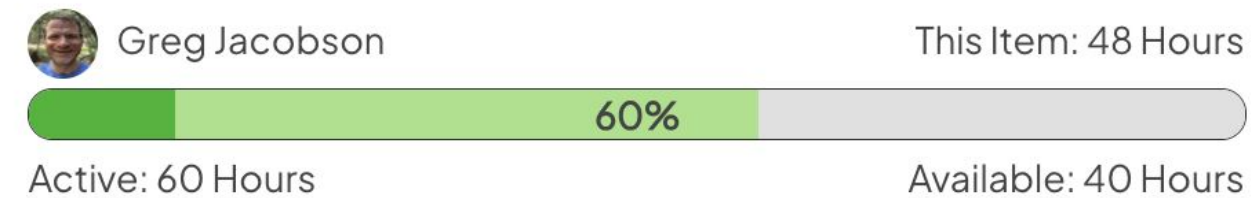
### Facilitator



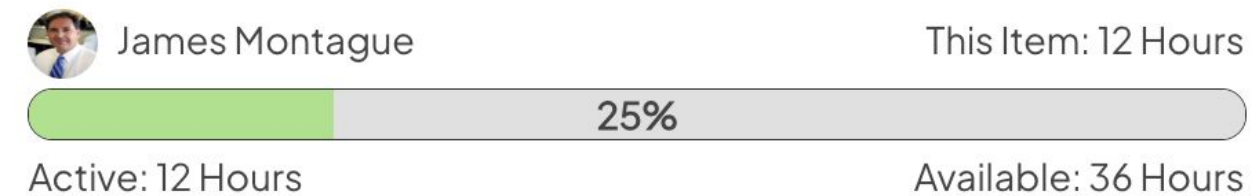
### Project Sponsor



### Team Leader



### Operations Manager

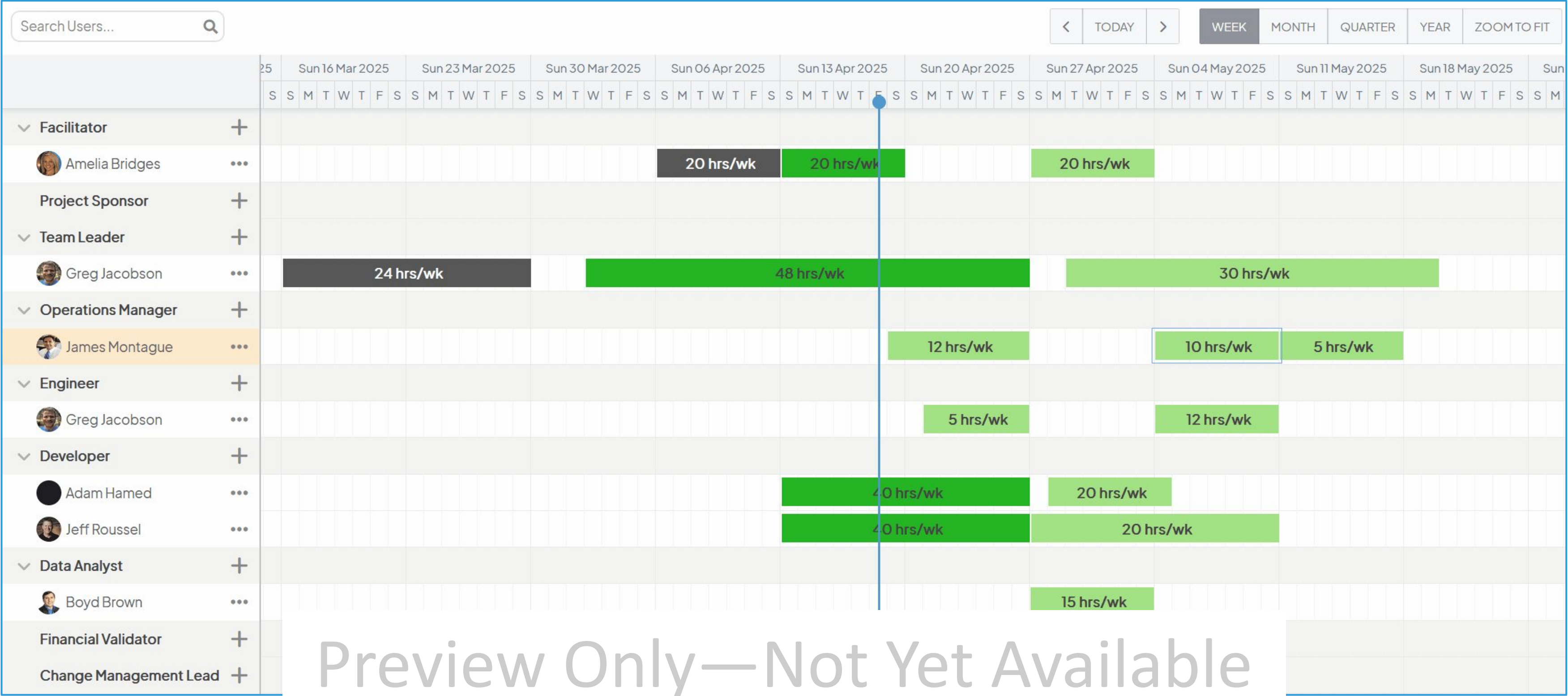


### Engineer

Preview Only—Not Yet Available

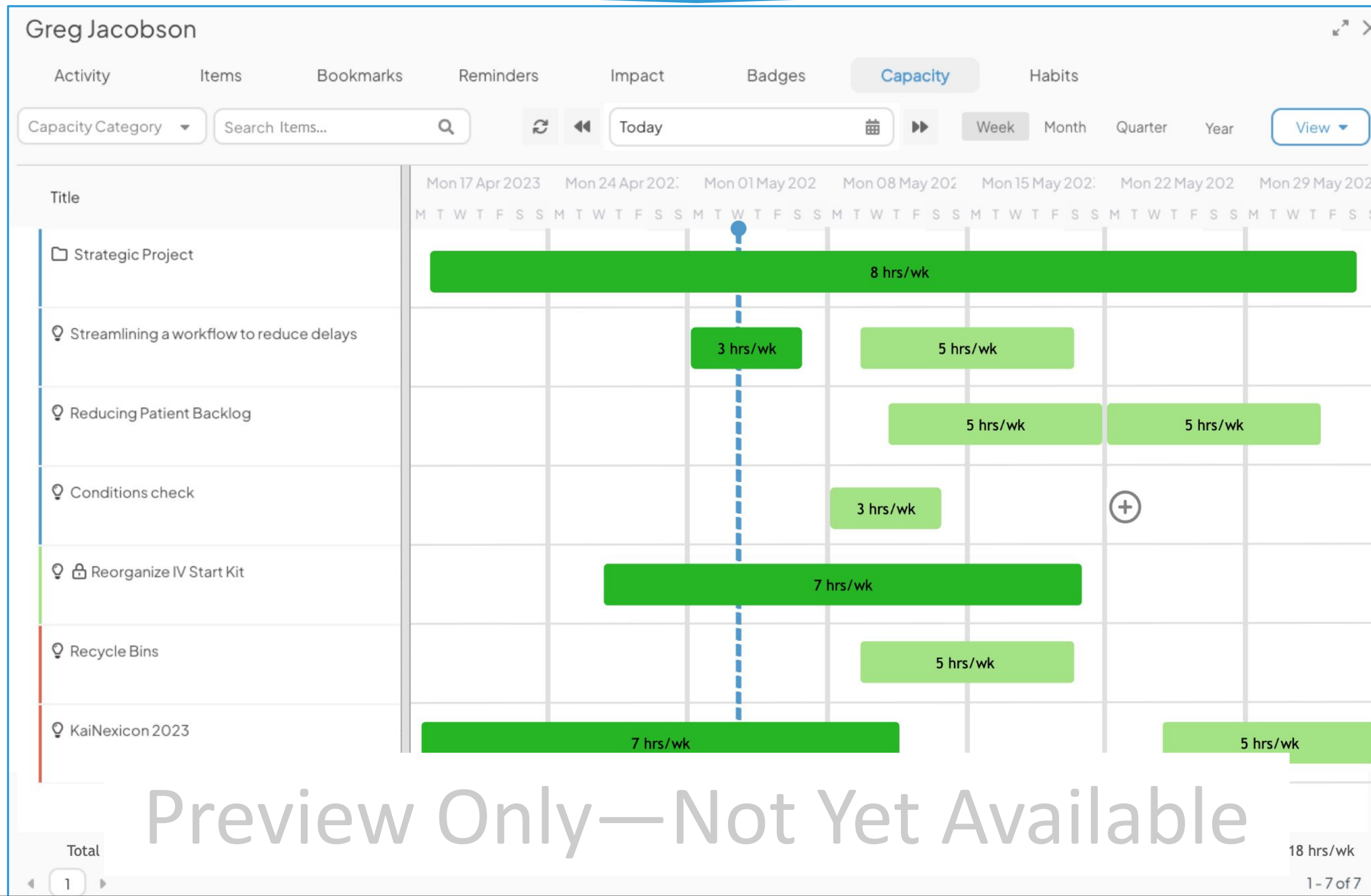


# Capacity Planning



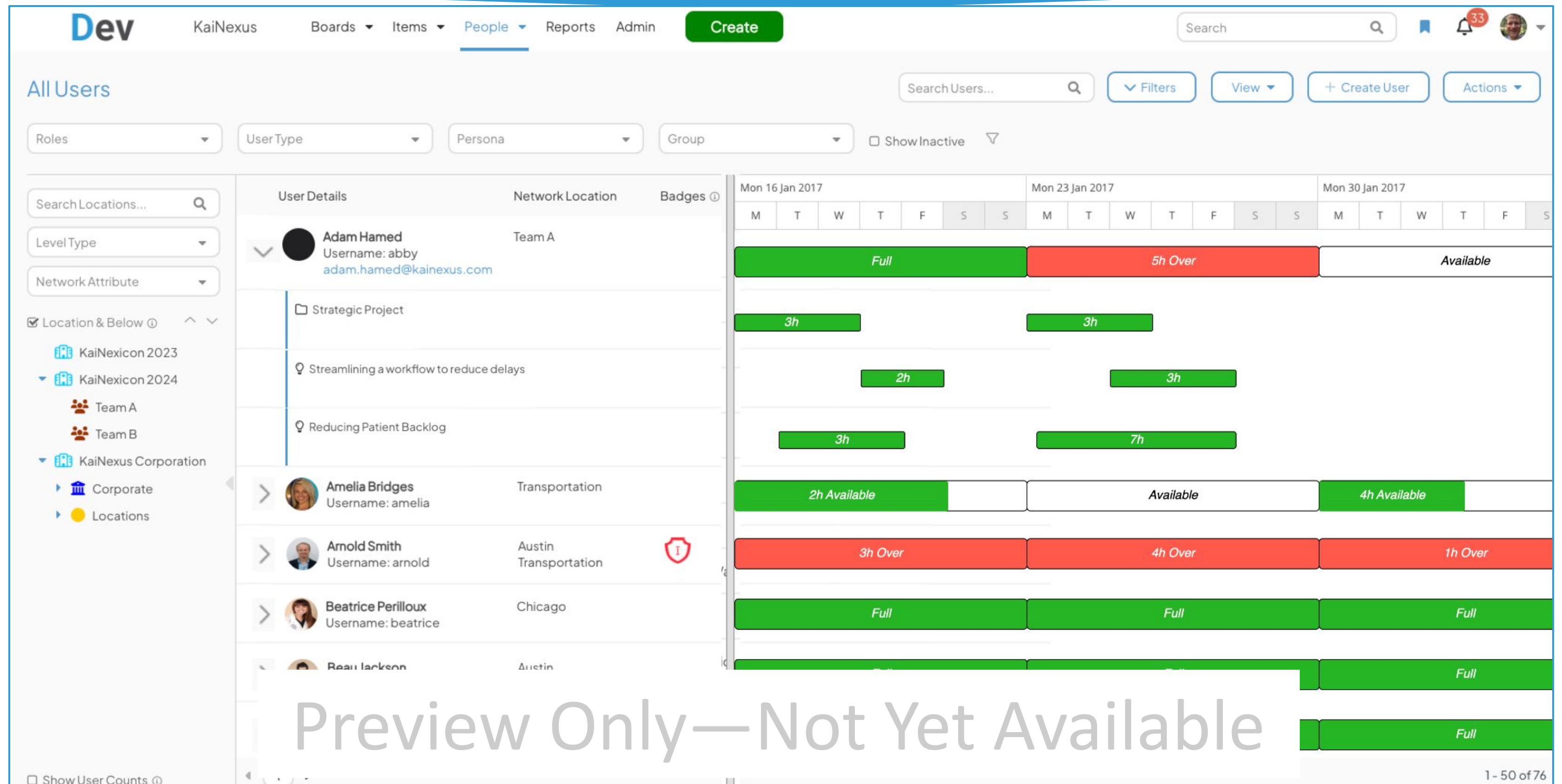


# Capacity Planning





# Capacity Planning







# Assessments



# Assessments

## Administration

### Organization

Network	Configure your organization's structure/hierarchy.
Level Types	Configure the levels that represent your organization's Network (e.g. Department).
Roles	Configure Roles including Permissions and Notification Preferences.
Goals	Configure Goals for your Organization.
Currency Exchange Rates	Configure the Exchange Rates for the Currencies used by your organization.
Time Savings People	Configure the list of people that can be selected for Time Savings Impact Types.
Products	Configure the list of Products that can be selected for Product Impact Types.
Resources	Configure the list of Resources that can be selected for the Resource Impact Types.
Wastes	Configure the list of Wastes that can be selected for Waste Impact Types.
Environmental Impacts	Configure the list of Environmental Impacts that can be selected for Environmental Impact Types.
Cycle Time	Configure the list of Cycle Time processes that can be selected for the Cycle Time Impact Types.
Lead Time	Configure the list of Lead Time processes that can be selected for the Lead Time Impact Types.
Takt Time	Configure the list of Takt Time processes that can be selected for the Takt Time Impact Types.
Standard Work	Configure Standard Work. Standard Work allows you to prepopulate Template Items.
Weighted Scores	Configure Weighted Scores. Weighted Scores provide the ability to rank Item Scores.
Workflows	View the list of your organization's Workflows.
Templates	View the list of your organization's Templates.
Fields	Configure Fields that are used on Templates.
Attributes	Add, remove, or modify the attributes that are used on your organization's Templates.
Multi Chart Importer	Update the data of your organization's Charts via an XLSX upload.

### Assessments

- Assessments
- Assessment Fields

## Create Assessment

Name:

Description: ⓘ

Max # of Assessments Performed: ⓘ

Parent Templates - Auto Create: ⓘ  ⓘ

Parent Templates - Available: ⓘ  ⓘ

Child Templates: ⓘ

Auto Title Format: ⓘ

Preview Only—Not Yet Available



# Assessments

Assessments > 5S Audit

Search Fields...

Show Archived

	Name	Description
↕ +	No irrelevant reference materials, documents, drawings, etc	
↕ +	No irrelevant reference materials, documents, etc	
↕ +	No excess pieces of equipment, documents, etc	
↕ +	Storage area is defined to store unneeded items and out-dated documents	
↕ +	Standards for eliminating unnecessary items exist and are being followed	
↕ +	Locations of tools and equipment are clear and well organized	
↕ +	Locations of materials and products are clear and well organized	
↕ +	Labels exist to indicate locations, containers, boxes, shelves & stored items	
↕ +	Evidence of inventory control exists	
↕ +	Dividing lines are clearly ide	
↕ +	Safety equipment and supp	

Create Field

New or Existing Field:

☒ New

☐ Existing

Name:

Description: ⓘ

Type:

Text Area

Required:

☒ No

☐ Yes

Additional

Min: ⓘ

Max: ⓘ

+ Add

Preview Only—Not Yet Available



# Assessments

2 of 62

Tractor 1 #4976

NEW

+ Add

Actions

All

Comments

Projects

Improvements

Incidents

Tasks

Charts

Timeline

[Assessment Name]

Create Assessment

1.0 Is the area safe and free from risks?

1.1 Is there an Escalation Procedure in place that clearly defines who to inform and involve in the factory and when in case of breakdowns?

1.2 Is the Escalation Procedure displayed in the area as a flowchart that clearly shows responsibilities and roles in every step?

1.3 Is the Maintenance Team Leader able to explain the Escalation Procedure to the assessor without consulting the document?

1.4 Can two randomly chosen technicians show the assessor what they must do according to the Escalation Procedure?

1.5 Can the Maintenance Team Leader provide a couple of recent examples of when the Escalation Procedure was followed for breakdowns?

2.0 Has a factual 5S audit been conducted in all the maintenance areas belonging to the audited team within the last week and is the standard audit sheet displayed?

2.1 Is the Maintenance Team Leader able to conduct the 5S audit according to the current standard (while being evaluated in real-time by the assessor)?

2.2 Is the Maintenance Team Leader able to conduct the 5S audit according to the current standard (while being evaluated in real-time by the assessor)?

2.3 Can the Maintenance Team Leader justify the scoring based on the assessed maintenance area's conditions?

2.4 Is the difference between the 5S audit results conducted by the Team Leader and the assessor on the same area not greater than 0.5?

2.5 Is the 5S audit score of each area greater than 3?

Team

Author

Greg Jacobson

+ Follow

Dates

Created

12 Jul 2022

Start

None

Due

None

Last Updated

8 Jun 2024

Preview Only—Not Yet Available



# Assessments

## Create [Assessment Name]



Title:

[Parent Name - Assessment Name Date & Time]

01. Is the area safe and free from risks?:

Optional



02. The site QCP (identification, segregation of defects, escalation, recording) is being followed?:

Optional



03. Is the area efficient and organized? Red Tags are used appropriately?:

Optional



Preview Only—Not Yet Available





# Assessments

2 of 62

Tractor 1 #4976

NEW

All

Comments

Projects

Improvements

Incidents

Tasks

Charts

Timeline

[Assessment Name]

Create Assessment

Team

Completion: 100%

[Weighted Score Name]: 96

Show List

Show Summary

Schedule

Dates

Created

12 Jul 2022

Start

None

Due

None

Last Updated

3 Jun 2024

[Name of most recent nested assessment item] COMPLETE

1.0 Is the area safe and free from risks?

Yes

1.1 Is there an Escalation Procedure in place that clearly defines who to inform and involve in the factory and when in case of breakdowns?

Yes

1.2 Is the Escalation Procedure displayed in the area as a flowchart that clearly shows responsibilities and roles in every step?

Yes

1.3 Is the Maintenance Team Leader able to explain the Escalation Procedure to the assessor without consulting the document?

Yes

1.4 Can two randomly chosen technicians show the assessor what they must do according to the Escalation Procedure?

Yes

Preview Only—Not Yet Available



# Assessments

Recur

!

Recurring Items are Items that happen on a regular basis.  
[What happens when I make this Item recurring?](#)

Make Recurring?

☒ Yes ☐ No

Once Completed:

☒ Reopen ☐ Create New Copy

Frequency

Required

Days to Complete

Immediately

Day of Week

Day of Month

Days After Complete

Save

Cancel

Recur

!

Recurring Items are Items that happen on a regular basis.  
[What happens when I make this Item recurring?](#)

Make Recurring?

☒ Yes ☐ No

Author:

Required

Frequency

Required

Due:

Immediately

Day of Week

Day of Month

Daily

Weekly

Monthly

Quarterly

Yearly

Preview Only—Not Yet Available



# Assessments

Tractor 1 - Assessment 1 Summary

⚠ Partial results shown ⓘ

Completed in 

Past 30 Days

	6/3/24	6/5/24	6/7/24	6/10/24	6/12/24	6/14/24	6/17/24	6/19/24	6/21/24	6/24/24	6/26/24	6/28/24	7/3/24
Status	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	ACTIVE	OVERDUE	PLANNED	NEW
[Weighted Score Name]	10	10	8.5	9	8.5	10	9.5	9	10	9.5	8.5	9	10
Question 1	●	●	●	●	●	●	●	●	●	●	●	●	●
Question 2	●	●	●	●	●	●	●	●	●	●	●	●	●
Question 3	●	●	●	●	●	●	●	●	●	●	●	●	●
Question 4	●	●	●	●	●	●	●	●	●	●	●	●	●
Question 5	●	●	●	●	●	●	●	●	●	●	●	●	●
Question 6	●	●	●	●	●	●	●	●	●	●	●	●	●
Ques													
Ques													

Preview Only—Not Yet Available



# Anticipated for EOY



# KaiNexus Support

Welcome! How can we help?

 Search for answers



## The Basics

From account activation to FAQ, this section will teach you the KaiNexus basics.



## Admin

Are you a User with Admin area access?  
These articles are for you!



## KaiNexus Updates

Check out our newest features and latest release notes!