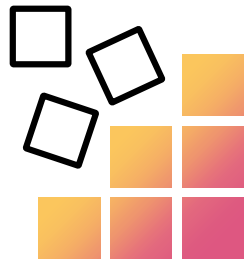


Obeya Fundamentals

TRAINING MODULE & TRAVEL JOURNAL

HOW OBEYA CREATES
SYSTEMIZED ENGAGEMENT
FOR SUSTAINABLE &
INCLUSIVE DECISION MAKING



OBEYA
association
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OBEYA
BY THE OBEYA ASSOCIATION



THIS ICON IS USED TO INDICATE
GROUP EXERCISES USEFUL FOR
STARTING UP AN OBEYA

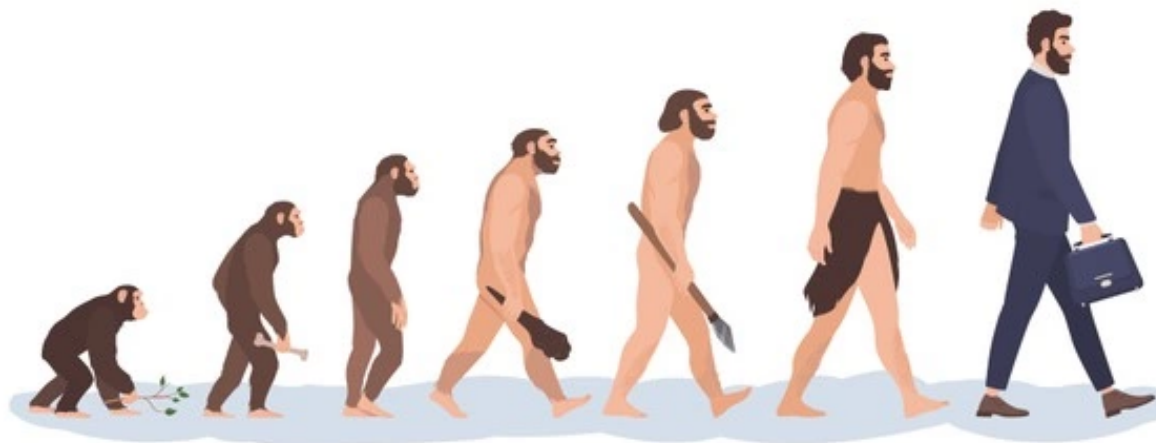
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As a group, discuss the question stated below:

“ARE WE IN AN ERA OF CHANGE OR IN CHANGE OF AN ERA?”



***Volatile, uncertain, complex and ambiguous**, or VUCA, is used to describe the influences of our world today and how this challenges us to make decisions and plans and deal with risks and changes. Obeya proposes a model that helps organizations learn on a continuous basis to deal with this. Obeya facilitates us to include different perspectives and information sources, to simplify, to devote resources and to yield empirical data through experiments. The ability of Obeya to help us deal with the challenges of our time makes working with Obeya increasingly popular.*

Sustainable and inclusive decision making

Most people know Obeya as a physical or digital workspace where strategy meets execution. Since Obeya guides both behavior as well as a work environment design, Obeya deserves a wider definition.

An Obeya can thus be regarded as a system, a concept and even a philosophy, defined by a particular set of ideas (“principles”) that enable inclusive and sustainable decision making. This set of ideas comprises of 11 Obeya Principles which back the powerful combination between behavior and work environment design.

Obeya supports effective pursuit of strategic goals:

- Achieves team alignment
- Promotes coherent, purposeful action
- Helps deliver meaningful results across the organization

Sustainable decision making means: decisions are oriented on long term value creation. Every day decisions are constantly weighed according to their longer horizon merits, leading to organizations that are able to shift gradually when needed. They become responsive. Change can become a normal - non intruding - part of every day operations.

Inclusive decision making means: including multiple information sources and multiple perspectives simultaneously. Taking broadly supported decisions saves valuable time. Better decisions can be made. Faster.

A “traditional” organization (designed primarily for stability) is often rigid and slow moving. Governance models are often too complex, displaying many vertical command structures and too little horizontal connections.

“A physical and/or digital space where strategy meets execution. The Obeya approach builds alignment and ownership across diverse groups of stakeholders to solve complex problems, drive cultural change and get work done.”



Obeya - a long history of learning & improving

Obeya or Oobeya (from Japanese 大 部屋) literally means “large room” or “room”. The roots of what is now a valuable management practice can be found across continents, with many disciplines influencing each other throughout history.

The Analects of Confucius 2500 years ago (China, 479 - 221 BC) seem to be the earliest notion of what later developed into many different management philosophies. The Analects are believed to be written up by Confucius' disciples over the course of 30 to 50 years.

The Analects could be regarded as an influential social and ethical philosophy. Rich, diverse and over 2500 years old, Confucian tradition teaches about the idea that good life lies in social relations, starting with family and extending into friends and community. Confucianism highlights the question on what roles we occupy in our lifetime and what our obligations are regarding those roles.

Confucius proposed learning as a cycle of stages, in which early stages are focused around improving understanding. Next, according to Confucius, we need to think critically about what we (want to) learn.

Simultaneously, actual physical places arise where 'the way is practiced' which evolves throughout Eastern history. A central tradition within these places is the use of visual stimulation, a link with modern day Obeya use.

Confucianism favors light government, informal means of social control and emotional harmony. Confucius can be considered an educator, encouraging constant questioning in the pursuit of learning.



Confucius' ideas on learning from acting in order to improve can be considered fundamental to modern day Obeya practice. Read more on Obeya's Eastern roots [here](#).



CHECK OUT THIS VIDEO ON
THE ESSENCE OF OBEYA AND
ITS EASTERN ROOTS ON OUR
YOUTUBE CHANNEL



Some time later in history, the West starts building upon an idea we would now call a 'scientific' approach. Francis Bacon (1561 - 1626 AD), an English philosopher and statesman, can be regarded as highly influential in this field. He argued for inductive reasoning and careful observation (often derived from nature) to avoid misleading conclusions. One of Bacons' goals in life was to uncover truth. His methodological ways to uncover truth (science) also show a clear link to modern day Obeya's. It is believed that Bacons' approach provided the roots of Plan - Do - Check - Act (PDCA) improvement cycles as proposed by Shewhart and Deming (1930) and eventually laid the foundations for SCRUM and Agile.

With the start of the Industrial Age roughly from the 1800's on, management practices evolve and Eastern and Western management philosophies start to influence each other. In Japan the company of Toyota successfully adopted Deming's ideas, which lead to the Toyota Production system (TPS). Resulting in higher standards for manufacturing. The resulting competition motivated American manufacturers to implement statistical quality control in the United States.

From the 1980's we see both MIT and Harvard playing vital roles in modeling management practices and providing empirical data/analyses. Visual management and the use of Obeya rooms became an integral part of said practices and are still becoming increasingly popular in modern days.

Researching Obeya's rich historical background we can see:

- Many exchanges between Eastern and Western philosophies throughout history
- Strong link with improvement cycles, especially PDCA
- Obeya practice logically rooted within both Lean and Agile practices
- Both MIT and Harvard have been influential; modeling practices and making them available for broader audiences
- Focus on work floor and human development



Francis Bacons' methodological (scientific) ways to uncover truth influence Western management practices before blending in with Eastern management practices.

Lean, Agile & Obeya are historically linked

Lean management, Agile, and Obeya are historically intertwined because they all share the same origins and principles.

Lean management was first developed by Toyota in the 1930s, and it focused on maximizing efficiency and minimizing waste. The principles of Lean manufacturing were then applied to other industries, such as healthcare and finance, and it evolved into a business management methodology.

Agile, on the other hand, was first introduced in 2001 with the publication of the Agile Manifesto, a set of guiding values and principles for Agile development. Agile was initially used in software development, but it was later adopted in other fields such as project management and product development.

All three methodologies share the same origins and principles: Lean management, Agile, and Obeya all focus on customer satisfaction and continuous improvement. They also prioritize communication and collaboration, and they use visual management tools to manage the work.

This historical intertwined connection between these three methodologies is one of the reasons why they are often used together and complement each other, leading to better results for the customer, faster innovation cycles, happy employees and improved overall performance of the organization.



Benefits of combining Obeya with Lean management and Agile methodologies:

- It can help to improve the efficiency and effectiveness of the organization's processes. By using visual management in an Obeya room, teams can identify and eliminate waste and improve the flow of materials, information and people. This can lead to cost savings and improved quality.
- It can help to improve communication and collaboration among team members. Obeya creates a centralized location for all stakeholders to communicate, collaborate, and make decisions. This can lead to faster decision making, improved problem-solving and better alignment among team members.
- It can help to improve customer satisfaction. By using Lean management and Agile methodologies, teams can focus on providing value to customers and meeting their needs. In addition, Obeya can help teams to gather customer feedback and use it to improve the product or service.
- It can help to improve the adaptability to changing requirements. The ability to adapt to changing customer requirements and feedback is a key benefit of Agile and Lean management, and using Obeya can enhance this capability. Teams can quickly identify and resolve issues, and make adjustments as needed to ensure that the final product or service meets the customer's needs.

Combining Obeya with Lean management and Agile methodologies can improve:

- Efficiency and effectiveness
- Communication and collaboration
- Customer satisfaction
- Adaptability to changing requirements

By combining Obeya with Lean management and Agile methodologies, teams can deliver better results for the customer and improve the overall performance of the organization.

Lean management: all about creating value

Lean management is a business management methodology that is focused on providing value to customers by maximizing efficiency and minimizing waste. It is based on the principles of Lean manufacturing, which was first developed by Toyota in the 1930s. Lean management seeks to identify and eliminate all forms of waste, such as overproduction, waiting, excess inventory, overprocessing, motion, and defects, in order to improve efficiency and quality.

The core principle of Lean management is continuous improvement, known as Kaizen. Kaizen is a philosophy of continuous small improvements that, over time, can lead to significant improvements in the overall performance of an organization. Lean management also emphasizes the involvement of all employees in the improvement process and encourages them to identify and eliminate waste.

Lean management also prioritizes flow, which means creating a smooth and efficient process from raw materials to the delivery of a product or service to the customer. This is achieved by eliminating bottlenecks and delays and ensuring that materials, information and people flow seamlessly through the process.

Lean management also promotes the use of visual management to visualize the flow of work, and to identify and resolve problems quickly. This helps to keep the team focused on the most important tasks and to keep the process moving smoothly.

Lean management is not only applied in manufacturing but also in various industries such as healthcare, finance, construction, and many others. Some of the well-known lean management frameworks are Lean Six Sigma and Lean Startup.

Lean management is based on the principle of value creation through continuous improvement, the elimination of waste, and the flow of materials, information and people.

Deliver working products fast

Agile is a methodology that is focused on delivering value to customers through rapid, iterative and flexible processes. Agile teams work in short cycles, called sprints, usually 2-4 weeks, to deliver working products or services to customers as soon as possible. The team receives feedback from customers on each sprint and uses it to improve and iterate the product or service. This approach allows Agile teams to quickly adapt to changing requirements and customer needs.

Agile methodologies also prioritize communication and collaboration between team members. Daily stand-up meetings are used to ensure that everyone is on the same page and to identify and resolve any issues. Agile teams are self-organizing and cross-functional, which means that team members have different skills and expertise and are empowered to make decisions and manage their own work. This creates a sense of ownership and accountability among team members.

The Agile manifesto highlights four core values, which are:

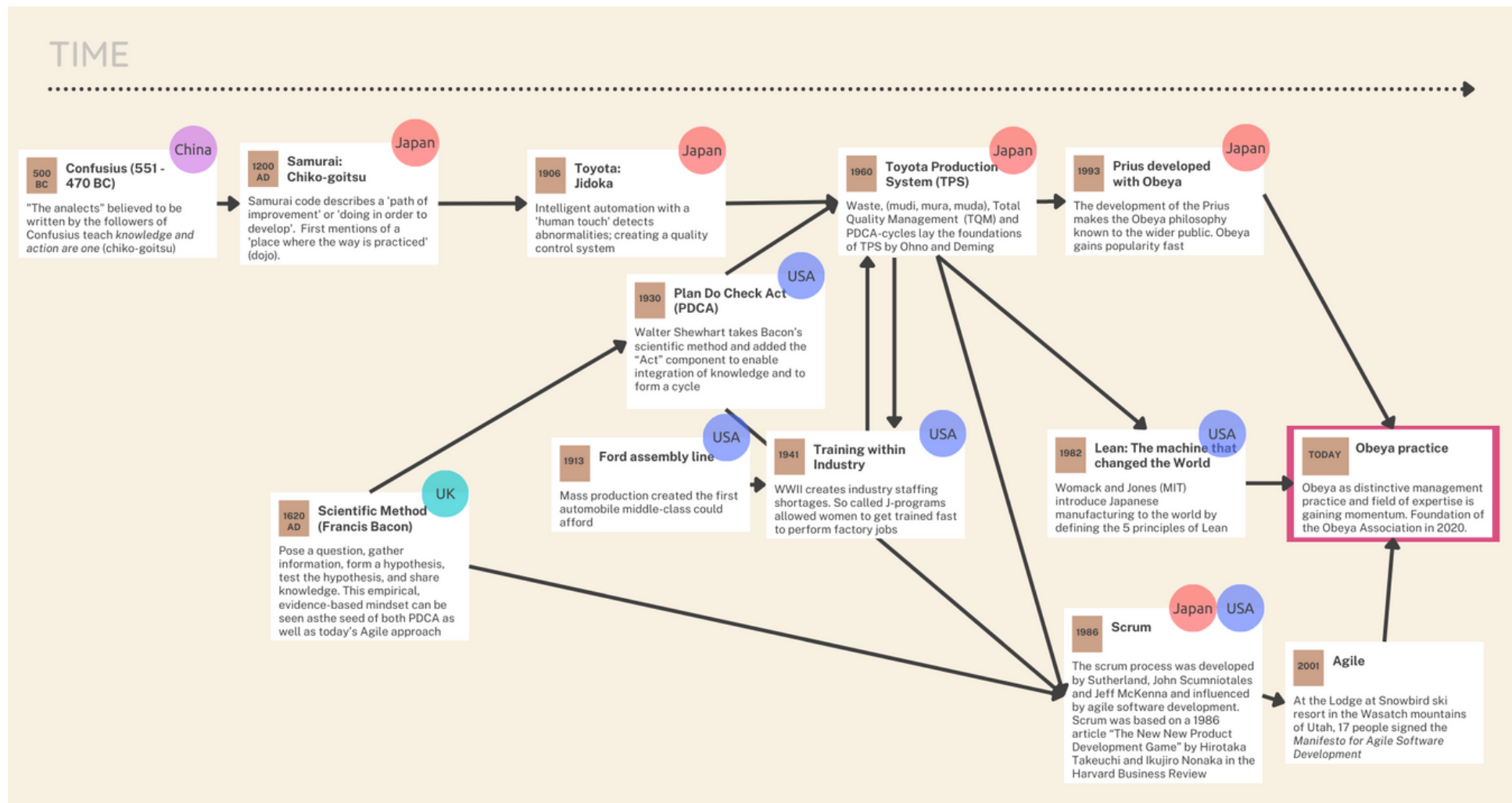
- Individuals and interactions over processes and tools
- Working software (products) over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan

These values are the foundation of Agile and provide a clear direction for Agile teams to follow. The key benefit of Agile is its ability to adapt to changing customer requirements and feedback, which results in delivering the right product or service that meets the customer's needs.

Agile prioritizes communication, collaboration, and customer feedback to ensure that the final product or service is exactly what the customer wants and needs.

Obeya - Historic timeline

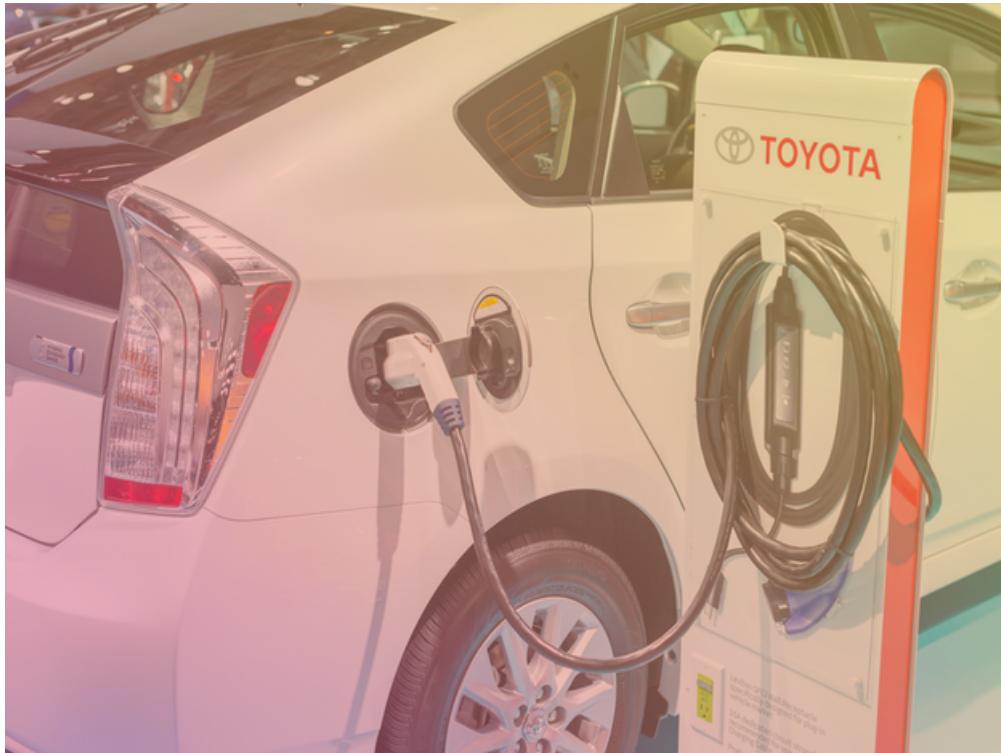
Many roots of the Obeya can be found if you research history enough. This narrative is a grave generalization of the total historical picture. Nevertheless, we hope to show some of Obeya's essence by revealing some of its history - certainly not all of it.



Recent history - how Obeya gained momentum

Toyota put Obeya into practice back in 1993 launching their first Prius as a part of the Toyota Lean Manufacturing System. Takeshi Uchiyamada, a Toyota Chief Engineer, was given a difficult challenge: designing the car of the 21st century, with very aggressive fuel consumption targets.

In less than three years, the first hybrid car, the Prius, was brought to market – 15 years ahead of the competition.



If you think of an organization as a nervous system, then Obeya would be the brain of the system



To pull off such a feat, the Chief Engineer also had to invent a new product and process development approach. He designed a new kind of visual management, which has since spread across Toyota engineering offices: the Obeya. Analogies have been drawn between an Obeya and the bridge of a ship, a war room and even a brain. It is a place of collective learning. Where information is synthesized and digested, analyzed and actions are prioritized. Finally, the aim of all this information is to take well informed decisions. Obeya uses both the power of information as well as it involves multiple parties perspectives and knowledge simultaneously.

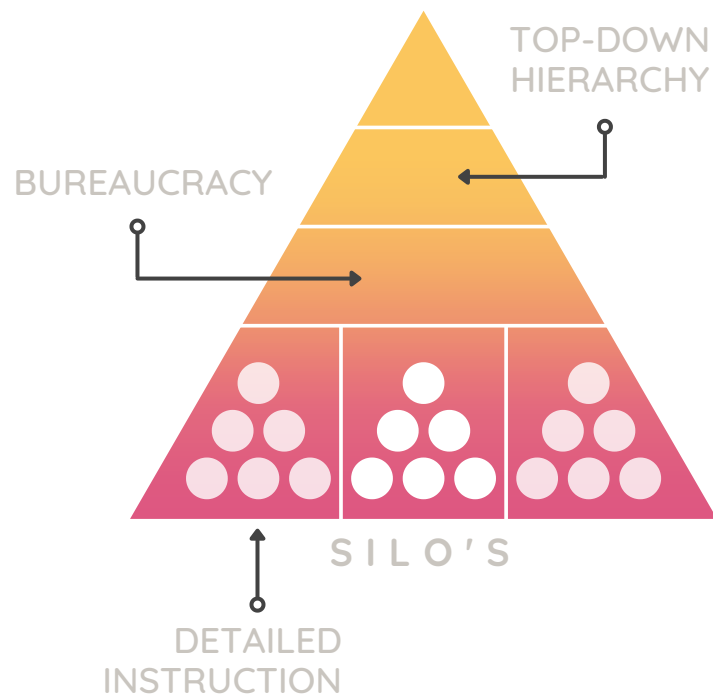
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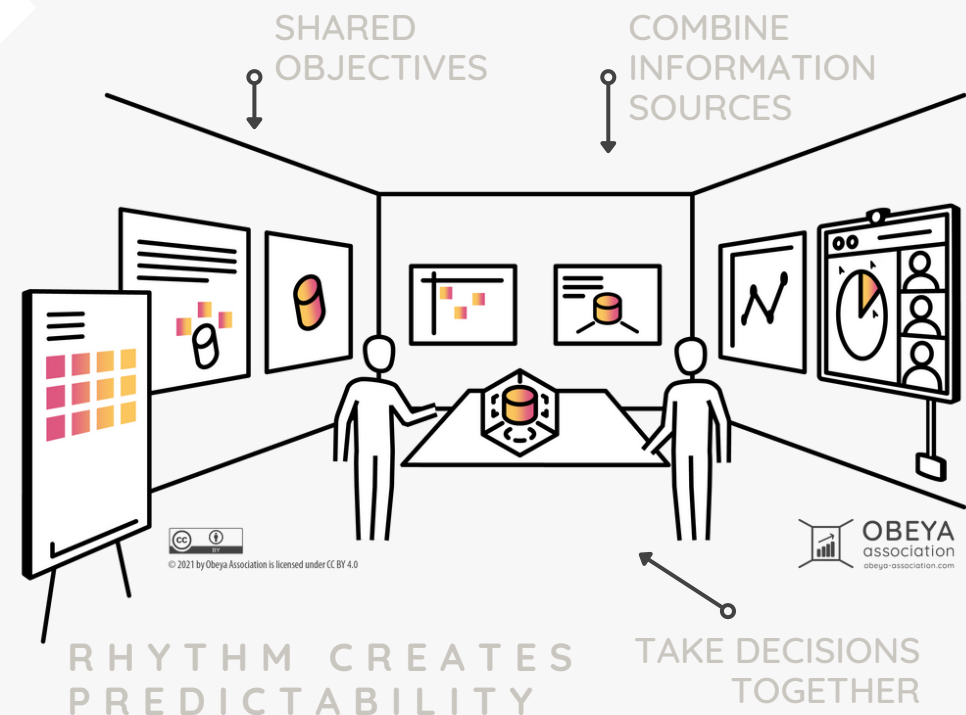
FROM

- ✗ Disconnected Strategy and Execution
- ✗ Opinions and scattered information
- ✗ Lack of overview needed to make the right decisions
- ✗ Isolated silo's
- ✗ Vertical reporting lines, hierarchies
- ✗ Process focus
- ✗ Time & energy lost on updating, reactive



TO

- ✓ Focus, set the right priorities
- ✓ Single source of truth, accelerated learning, short communication
- ✓ Transparent progress overview & actual operations status
- ✓ Continuous improvement, organizational development
- ✓ Leadership & team development, fast decision cycles
- ✓ Client focus, ownership on objectives
- ✓ Problem solving, result orientation, proactive



TRADITIONAL REPORT MANAGEMENT

1. Hierarchical Strategy - Annual plans - Department plans without coherence and synchronization
2. Excel sheets with numbers and unclear (& outdated) status updates
3. Infinite emails with reports and discussions on assumptions and choices to be made
4. Unclear coherence of all the programs, projects and KPI's
5. Long management meetings needed to discuss unclear results
6. Unclear escalations on unclear priorities
7. Hard to receive an overview on total program and change portfolio
8. Board ownership unclear
9. Behaviour not result oriented



OBEYA VISUAL MANAGEMENT

1. A visual flow from strategy to execution which is synchronized between the people involved and regularly reviewed
2. Visual status overview with the actual status being part of the responsibility of the Obeya attendant
3. Clear performance dialogues with each other leading to an unambiguous base point
4. Clear overview on the coherence of all programs and their results
5. Weekly short meeting on the results of the organization
6. Clear blockages are cascaded to the level on which they can be solved and are accompanied by clear priorities
7. Transparent visual overview on change portfolio and total portfolio
8. Full commitment on change agenda by leadership
9. Result oriented interventions on behavior of Obeya participants



PLEASE PROVIDE ANSWERS TO THE FOLLOWING QUESTIONS
ACCORDING TO THE BEST OF YOUR CURRENT KNOWLEDGE:

Strategy and execution are connected

A LITTLE			A LOT	
1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

We constantly learn from accurate information

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

We decide fast

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other teams / departments work towards the
same objectives

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I know what other teams / departments
are doing, why and when

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Our performance informs our priorities

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I spend my worktime feeling it
leads to something valuable

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



What can you conclude?

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PLEASE PROVIDE ANSWERS TO THE FOLLOWING QUESTIONS
ACCORDING TO THE BEST OF YOUR CURRENT KNOWLEDGE:

Are we connected?

YES NO UNCLEAR
☐ ☐ ☐

Is everyone working on the same objective

YES NO UNCLEAR
☐ ☐ ☐

Are we meeting delivery/deadlines?

YES NO UNCLEAR
☐ ☐ ☐

Do our decisions reach everyone?

YES NO UNCLEAR
☐ ☐ ☐

Are we looking at the right information?

YES NO UNCLEAR
☐ ☐ ☐

Do we know which problems we want to solve?

YES NO UNCLEAR
☐ ☐ ☐

Are the right people involved to reach objectives?

YES NO UNCLEAR
☐ ☐ ☐



What can you conclude?

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Why do you exist as a group or as a company?

What binds you? What is the common purpose behind your everyday activities and what is the reason for working together? What is your contribution to the bigger whole?

What problems do you want to solve?

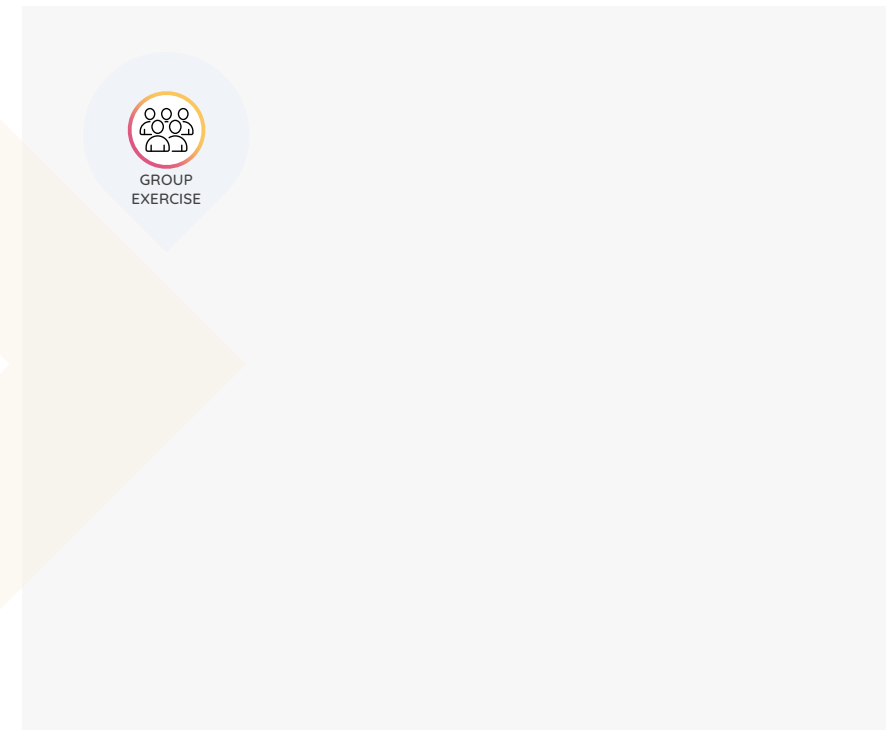
What would make your work more effective? What did your conclusions from previous exercises teach you?

What information do you need?

Knowing which decisions you want to take and which information is important, benefits fast decision cycles. Similarly, Obeya's with an unnecessary information overload can complicate decision making.

Our Obeya purpose:

Taking everything into consideration; **'What do you want your Obeya to result in?'** What should be the ultimate outcome of all Obeya activities and efforts?



From experience:

Obeya's that are purposefully designed are more likely to lead to clear (and hopefully measurable) results. Often they are easier to implement. Building an Obeya is always instrumental to achieving a higher purpose.

Direction

HOW DO YOU KNOW IF YOU ARE HEADING IN THE RIGHT DIRECTION?

Success

HOW WILL YOU BE ABLE TO TELL IF YOU SUCCEEDED?

Measure

CAN YOU THINK OF A WAY TO OBJECTIVELY MEASURE PROGRESS?



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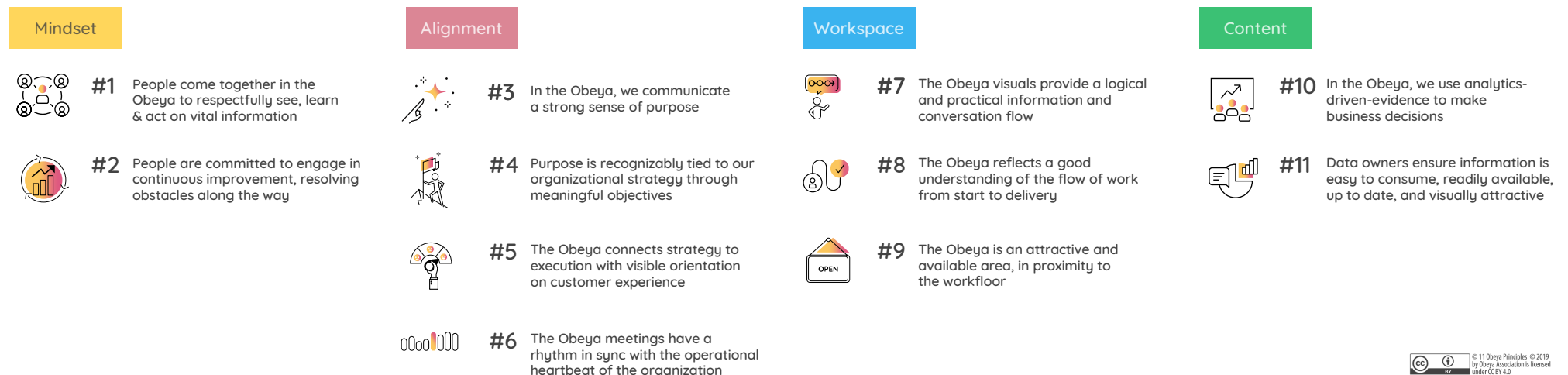
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A practical framework to build and improve your Obeya

An Obeya is as much about creating an effective workspace environment as it is about effective behavior. The both are represented in 4 quadrants around which an Obeya is build: **Mindset**, **Alignment**, **Workspace** and **Content**. The 11 Obeya Principles provide a further explanation and more detail. In essence, the 11 Obeya Principles define an Obeya.

The 11 Obeya Principles have very practical implications. Combined with the Obeya Builders and Obeya Host roles, they create a pragmatic and hands-on framework that will guide you through every step of your Obeya process.

You can start building an Obeya from any Principle and work your way through the other Principles. One by one, step by step.

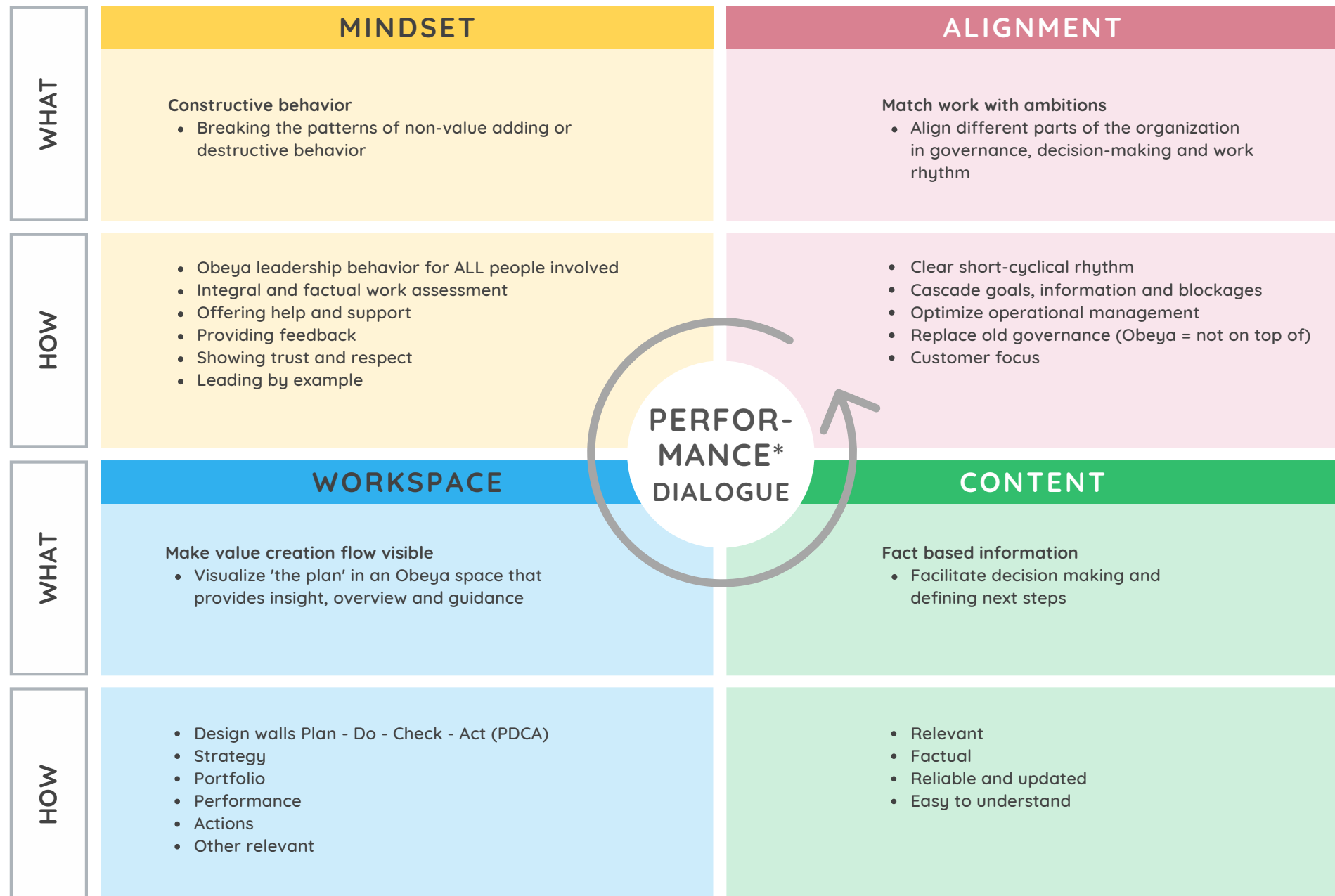


What is your favorite quadrant? And why?

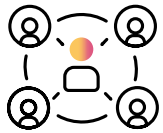
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Mindset



#1 People come together in the Obeya to respectfully see, learn & act on vital information

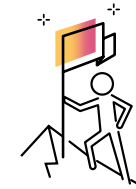


#2 People are committed to engage in continuous improvement, resolving obstacles along the way

Alignment



#3 In the Obeya, we communicate a strong sense of purpose



#4 Purpose is recognizably tied to our organizational strategy through meaningful objectives



#5 The Obeya connects strategy to execution with visible orientation on customer experience



#6 The Obeya meetings have a rhythm in sync with the operational heartbeat of the organization

Workspace



#7 The Obeya visuals provide a logical and practical information and conversation flow



#8 The Obeya reflects a good understanding of the flow of work from start to delivery

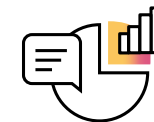


#9 The Obeya is an attractive and available area, in proximity to the workflow

Content



#10 In the Obeya, we use analytics-driven-evidence to make business decisions



#11 Data owners ensure information is easy to consume, readily available, up to date, and visually attractive

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Builder & Host: two different roles, both essential for a thriving Obeya

Before an Obeya can be used properly, it literally needs to be built up from the ground. The Obeya building process requires decisions about set-up, structure and content. This is where the role of Builder steps in. It is the Builders' assignment to bring an Obeya to an operational level. Once an Obeya is operational, the main focus shifts towards maintaining the information and using it effectively during Obeya meetings. This is the moment when the Obeya Host enters the stage. It is a Hosts' job to create a safe environment in which smooth and effective conversations take place that enable continuous group learning and conscious decision-making. Both roles demand a specific -and different- set of skills, attitudes and knowledge which is summarized in the following overview.

Builder



Knowledge

- Policy deployment
 - strategic imaging: OKR, Hoshin Kanri, Balanced Scorecard, valuestreams
 - operational imaging: Kanban, PI planning, Agile portfolio management, Customer Journey, Product roadmaps
 - PDCA cycles



Skills

- Analytical thinking: analysis
- Project management
- Continuous improvement
- Technical IT
- Visual management



Attitudes

- Accuracy
- Engagement
- Integrity

Host

Knowledge

- Psychological safety
- Group dynamics

Skills

- Analytical thinking: evaluation
- Performance dialogue
- Listening
- Facilitation
- Team Coaching

Attitudes

- Social & environmental awareness
- Customer orientation
- Organizational sensitivity
- Independent
- Servant leadership

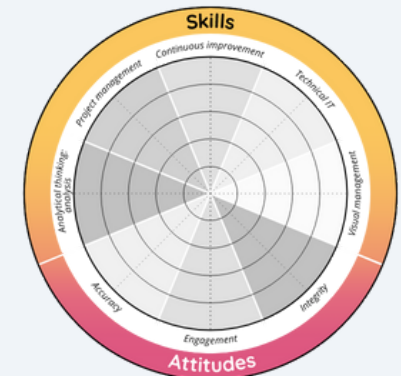


Figure Development instrument
Obeya Builder

As you will learn later on, the Obeya Association focuses on two aspects:
1) developing worldwide knowledge and expertise about Obeya and
2) supporting the professional development of Obeya professionals.
The figure above is an example of how this knowledge is translated into tools as part of the toolkit to train and coach Obeya professionals.
If you want to learn more about the development pathway to become Obeya Builder and/or Host, see the final chapter of this module.



CHECK THE OBEYA HOST AND OBEYA BUILDER ACTIVITIES AND LINK THEM TO YOUR FOCUS SCAN RESULTS!

Mindset



#1

People come together in the Obeya to respectfully see, learn & act on vital information

People coming together in meaningful interaction are the biggest compliment to any Obeya workspace. Integrity of the information presented is important for people to trust the Obeya process.

Obeya Hosts cultivate curiosity. In safe environments, multiple perspectives benefit the sustainability of decisions. Questions that turn insights into action are a Hosts' ultimate superpower.



#2

People are committed to engage in continuous improvement, resolving obstacles along the way

Obeya Builders realize that imperfections provide improvement opportunities. Never cover up bad news or white spots, always provide a genuine representation.

Obeya Hosts challenge status quo in a disciplined and cyclical rhythm where we try to improve every cycle. Facts and data are vital and empirical evidence builds up along the way.

Alignment



In the Obeya, we communicate a strong sense of purpose

Obeya Builders ensure purpose is distilled, periodically revised and clearly presented within the Obeya.

An Obeya Hosts refer to purpose and its implications at decisive moments. Purpose is a precondition for a Host to do meaningful work in the Obeya and enables teamwork.



Purpose is recognizably tied to our organizational strategy through meaningful objectives

Obeya Builders exhibit a visual and apparent link between purpose and objectives. Objectives are directional and transformational. Visualizing progress on objectives helps the work of Hosts.

Obeya Hosts cultivate understanding between objectives' outcomes, interdependencies and purpose. Hosts identify progress on objectives to accelerate learning and facilitate action.



The Obeya connects strategy to execution with visible orientation on customer experience

Obeya Builders display value creation as experienced by the customer. Clear strategy display benefits operational direction. In turn, work floor experiences provide feedback on strategic priorities.

Strategic feasibility gets tested through lessons from execution and customer experiences. Strategy provides operational direction. This is a cycle in which Hosts recognize and activate adjustments on both sides.



The Obeya meetings have a rhythm in sync with the operational heartbeat of the organization

Through meeting rhythms the Obeya creates systemized engagement. Obeya Builders make sure that all governance rhythms have synced timeframes.

Obeya Hosts coordinate that Obeya meetings take place at the right time and with the right people. Obeya decisions are recommended to be timely shared with the wider organization.

Workspace

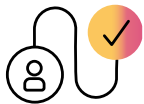


#7

The Obeya visuals provide a logical and practical information and conversation flow

Obeya Builders continuously improve information flow in the Obeya according to feedback from the Obeya Host. Information flow needs to translate into conversation flow.

Visual Management should guide Obeya conversation flow intuitively. Feedback on how the conversation flows is valuable towards Obeya Builders for information flow improvement.



#8

The Obeya reflects a good understanding of the flow of work from start to delivery

Obeya Builders exhibit the process or activities by which value is created, showing how and where different parties contribute their work into the larger whole.

Obeya workspaces need to allow an Obeya Host to invest in a shared understanding of 1) value delivery and its challenges and 2) the impact of workflow dynamics and practicalities.



#9

The Obeya is an attractive and available area, in proximity to the workflow

Obeya Builders pay attention to Obeya location, appearance, (smart) tooling and utilities. As a consequence, Obeya budget allocation also needs consideration.

Well sustained, often visited & transparent Obeya's work best. Hosts pick up signals where poor Obeya arrangements complicate Obeya results. Obeya Hosts coordinate with Obeya Builders.

Content



#10 In the Obeya, we use analytics-driven-evidence to make business decisions

Obeya Builders organize unambiguous (numerical) evidence. Critical information (data) can be synthesized into categories, whilst also reflecting their relative importance.

Obeya Hosts spark the learning process by skillful questioning, advancing insights in (the relation between) statistics. The insights benefit sustainable and inclusive decision making.



#11 Data owners ensure information is easy to consume, readily available, up to date, and visually attractive

Obeya Builders work alongside data owners, removing as much complexity as possible. Data collection is a formalized process that centralizes information in the Obeya.

Obeya Hosts improve fit between data (representation) and user needs. Hosts may invite data owners for explanation, building trust needed for organizations to rely on data for decisionmaking.

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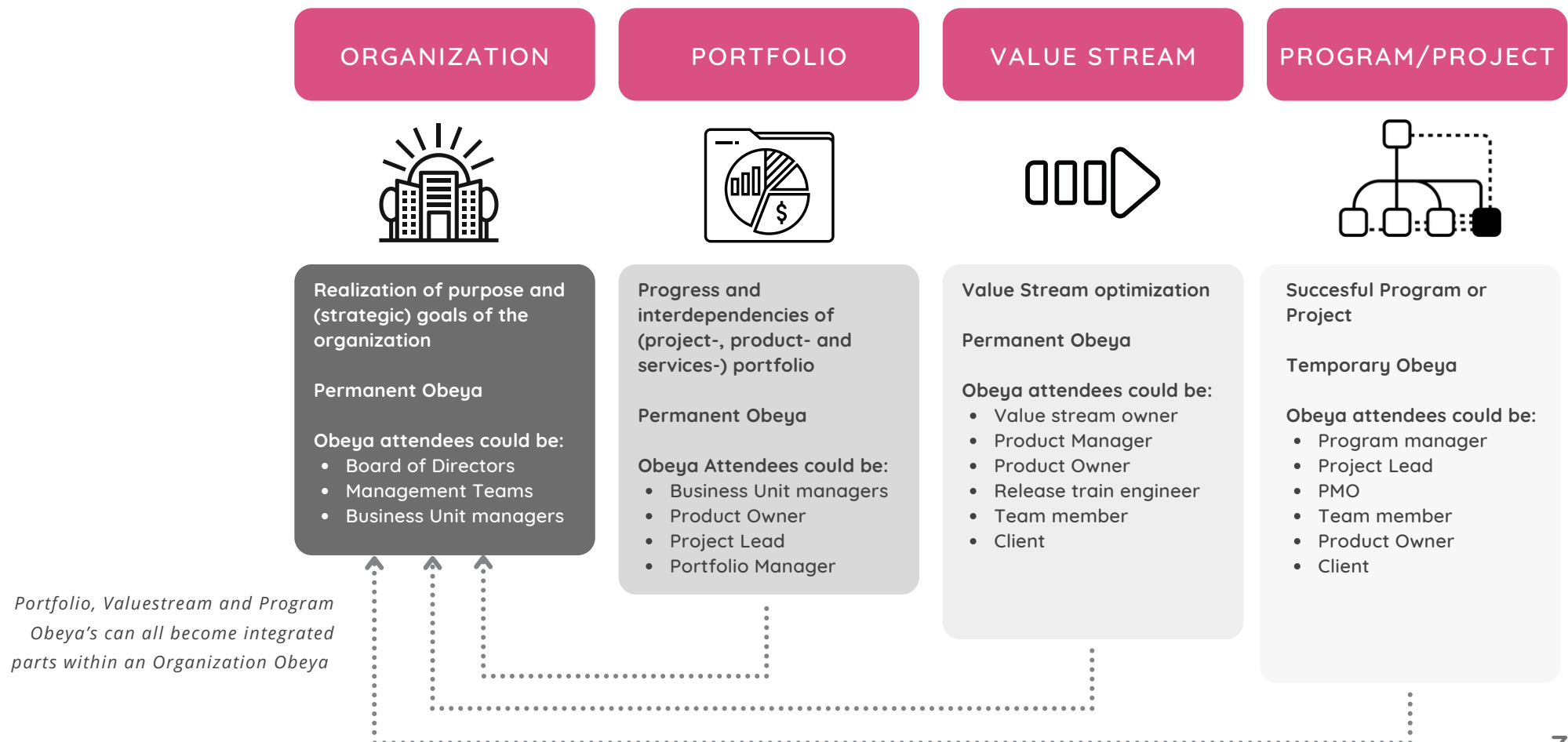
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There are multiple approaches to create a succesful Obeya

An Obeya can be designed to serve different purposes. Developing your Obeya along the lines of the 11 Principles, guided by professional Obeya Builders and Hosts, your Obeya can evolve in the direction. Nonetheless, throughout the years we have seen a couple of Obeya setups being used for certain purposes. They can help you choose a practical starting point based on the needs in your organization.

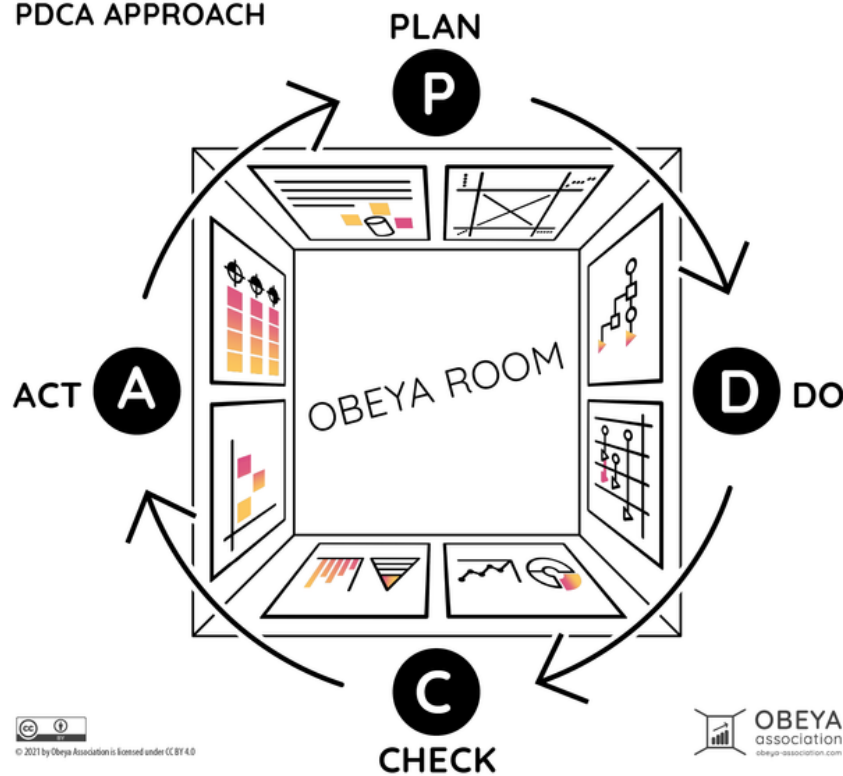
Underneath we'll briefly explain four Obeya types.



An Obeya room often consists of 4 walls

Depending on the available space. Not everyone has a room at his or her disposal and windows, doors and such can get in the way. The walls often are a reflection of the 'Way of Working' and especially within larger organizations multiple approaches can exist. An example below:

OBEYA: PDCA APPROACH



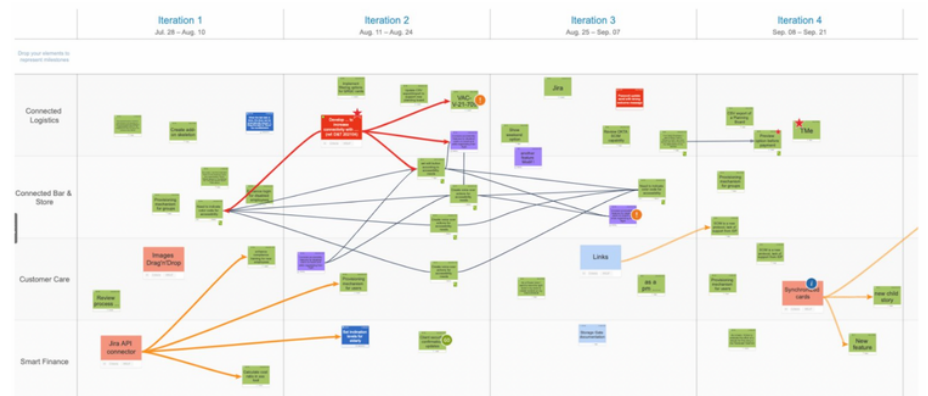
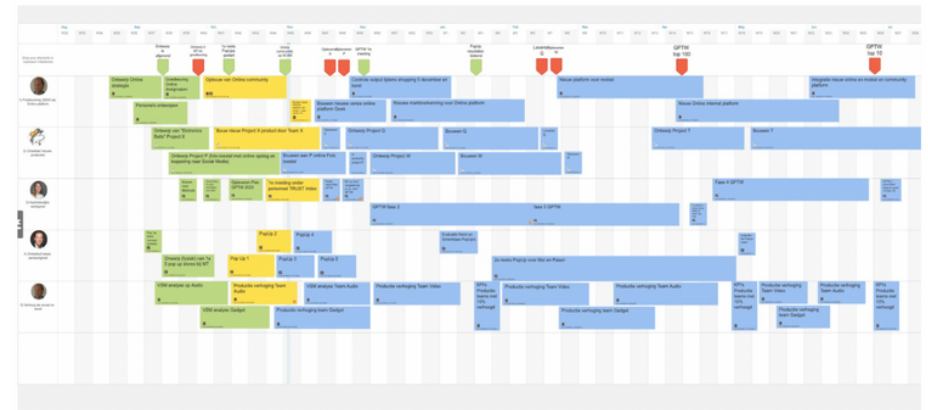
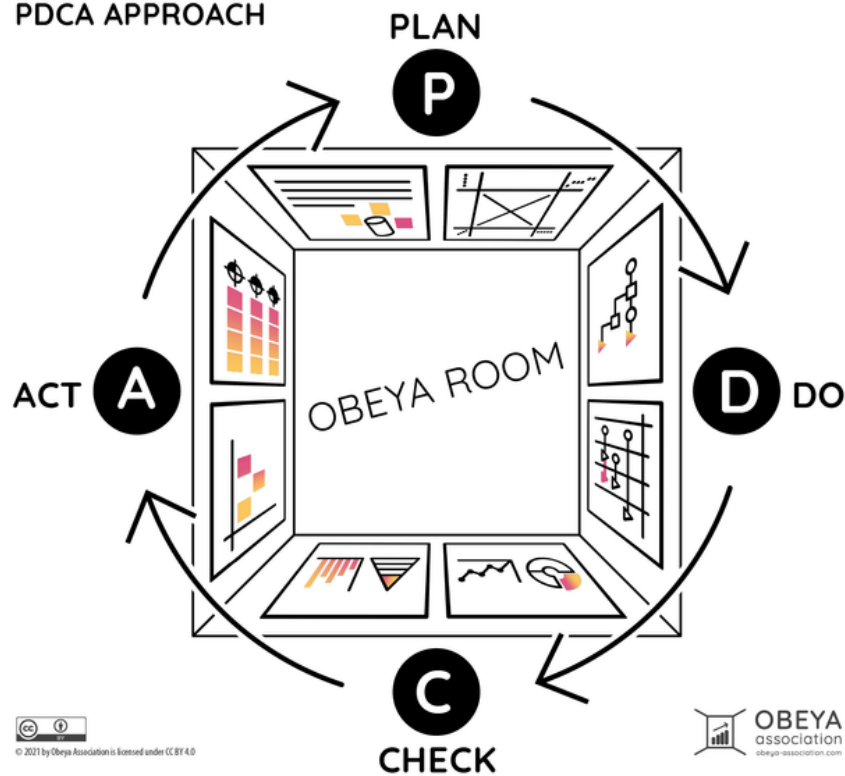
Top-management works traditionally, with planning based around planning flows (gantt charts)

Within ICT people are used to Agile work methods

Creating your Obeya visual workspace: Gantt chart planning versus Agile

As you can see the different Ways of Working create different kind of visual management structures on the wall. There is no good or bad here. What you aim for is a true reflection of the actual situation at hand.

OBEYA: PDCA APPROACH



Possible wall items (basic examples)

Strategy	Planning	Performance	Action	WoW (Way of Working)
Voice-of-the-Customer	Program / Project portfolio	Performance indicators (KPI's)	To do - Doing - Done	Obeya Agenda
Purpose / Mission / Vision	Capacity planning	Services (run indicators)	Blockages / impediments	Rules of engagement
True North / Hoshin Kanri	Themes, Epic's / Features	Financial performance indicators	Improvements (short term)	Decision log
Objectives Key Results (OKR)	Funnels	Employee satisfaction		Successes (to be celebrated)
Organizational Strategy	Priorities	Team Performance		
Big Hairy Goal (BHAG)	Roadmaps	Customer satisfaction		
Objectives / Strategic themes	Improvement project status	Risk assessments		

What elements or categories do you want to see represented in your Obeya?

.....

.....

.....

What Obeya setup appeals most to you? Why?

.....

.....

.....



SKETCH A FIRST DRAFT
OF YOUR OBEYA HERE

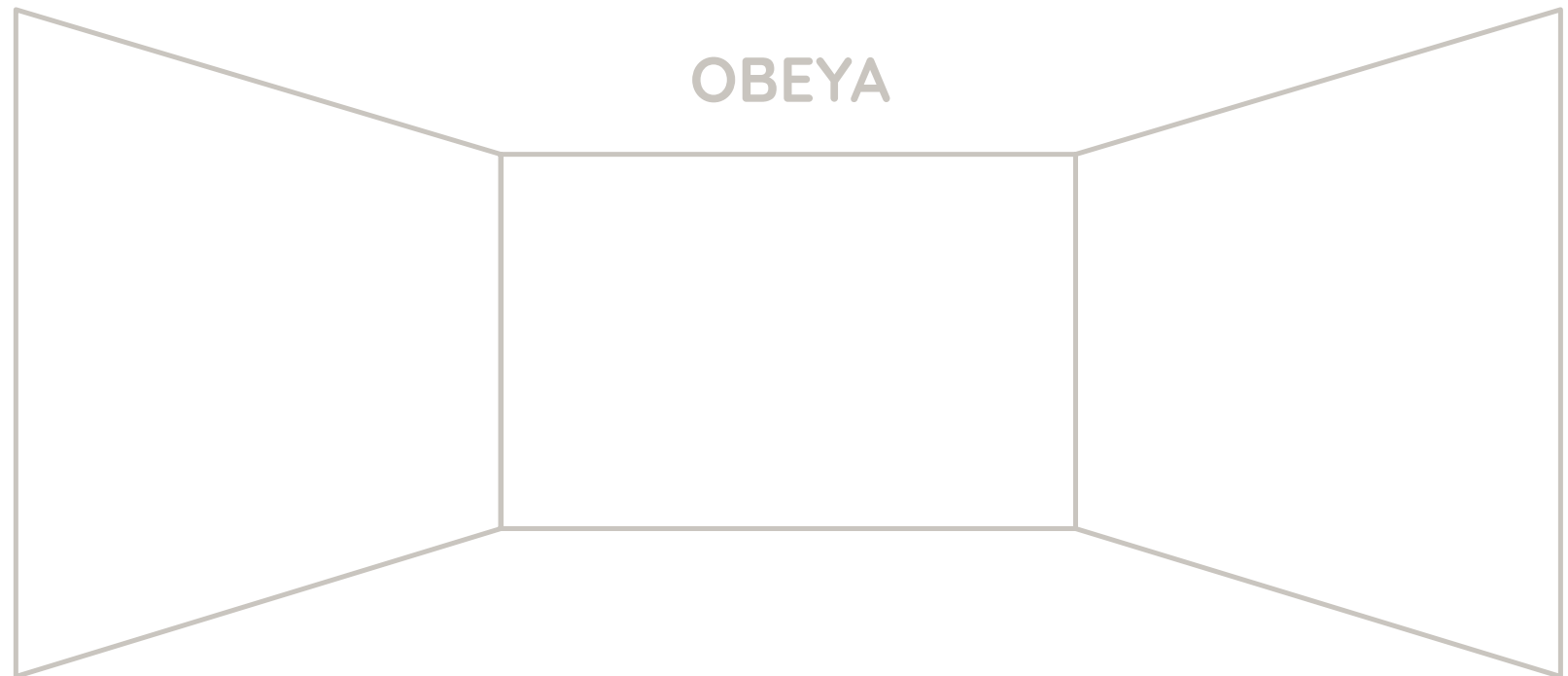


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Different kind of meetings in the Obeya

- There are different kind of meetings in an Obeya. Roughly you can divide them in strategical, tactical and operational meetings.
- Obeya rooms have iterative meeting rhythms. Different kind of meetings can have different iteration rhythms.
- Strategically oriented meetings can happen every 3 months and could take all day.
- The timespan between two tactical Obeya meeting iterations is shorter (1 or 2 weeks). A tactical Obeya meeting usually takes 1,5 hrs.
- Daily (operational) team stand-ups in the Obeya should take no longer than 30 minutes.
- Regularly (i.e. 1x per month) time is allocated to see if there is room for improvement within the quality of the sessions themselves.



An Obeya meeting is never meant to come “on-top-of” current meeting structures. It means to replace several of them together thus speeding up decision processes and saving valuable time

The importance of meeting rhythm & routine

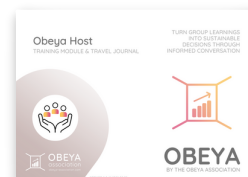
We already mentioned that Obeya enables a culture of continuous improvement. Continuous improvement is best achieved in multiple consecutive small steps instead of an approach that aims for a single solution. This is also referred to as a 'short-cyclical' way of working. A well-designed meeting rhythm and routine are necessary to nourture this way of working.

Obeya meetings have clear agenda's (routines) and are often timeboxed to allow for informed decisions to be made within accepted time frames.

Well-designed meeting routines require the right amount of structure. A structure that is too rigid can lower group energy, limit conversation depth and produces fixed conversations. Too little structure on the other hand, can lead to unclarity, chaotic meetings and lack of focus. People might feel lost and unsettled to make decisions.



FOR MORE DETAILS ON HOW TO RUN AN OBEYA MEETING - SEE THE "OBEYA HOST" MODULE BY THE OBEYA ASSOCIATION



Examples of an meeting routine and an Obeya improvement meeting

Bi-weekly tactical Obeya agenda

- Solve blockages / impediments
- Discuss updates on Portfolio and Change agenda and create action points
- Discuss (progress on) BHAG
- Discuss Production results and suggestions for performance improvements
- Potential deep dive on specific theme
- Celebrate successes!
- Short retrospective on meeting quality

Bi-monthly Obeya improvement meeting

- How can we improve our way of work in the Obeya?
- How can we solve blockages / impediments faster?
- How can we better set up (and control) our Change agenda?
- How can we get access to better information and how to visualize information better in the Obeya?
- How can we celebrate our successes better?
- How can we improve ownership and communication on results?
- How to create supportive and constructive behaviour in the Obeya?



THESE MEETINGS ARE IMPORTANT SOURCES OF INFORMATION THAT FUEL IMPROVEMENT DIRECTIONS FOR THE OBEYA BUILDER AND HOST

A few examples of 'Leading With Obeya' meeting routines

Deliver Value routine

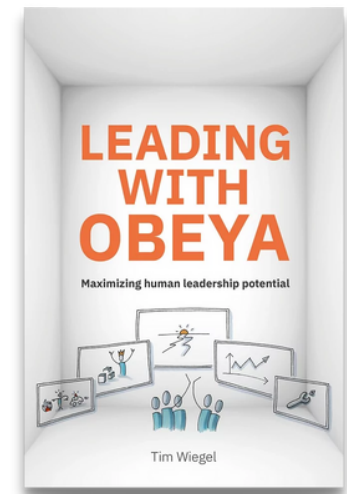
- See and learn if we are meeting our delivery objectives
- Respond to change
- Identify & monitor improvements
- Attendees: Obeya Builders / Hosts, senior sponsor, Po's, (program) managers, scrum masters
- Bi-weekly 1-2 hrs

Solve problems Routine

- Structured approach for solving defined improvement projects
- Attendees: Obeya Host, designated improvement project leaders
- According to Kata routine, could also be ad-hoc

Act & Respond Routine

- Act & respond to operational changes (and problems / impediments!)
- Following up on relevant actions
- Senior sponsor
- Monitor improvements
- Attendees: Obeya Builders / Hosts, Leadership team, managers
- 2x p/week 30 min



The book 'Leading with OBEYA' by Tim Wiegel can provide you with good ideas on how to shape your meeting routine.



DELIVER VALUE ROUTINE

Rhythm: Wednesdays 13:30 - 15:00 uneven weeks
Leadership Team + Coach + Programme Mgrs

Goal

To see and learn if we are meeting our delivery intentions, respond to change and to identify & monitor resolution of problems

Check-in

- Everybody present and focused? Things we should know about? Shall we use last meeting's improvements now?

Problems

- Which new problems are impeding progress? (e.g. Quality, Cost or Delivery(time))
- How must we address these problems?
- Have we been able to solve the problems addressed earlier?

Changes and Lessons Learned

- Per programme / project / team:
- What has changed in our delivery plan since our last meeting?
 - Do we grasp its consequences and impact on risks?
 - How must we respond to this change?
 - What have we learned in the last period?

Update pitch

- Three minutes of key updates per stream

Close

- Did we follow the routine and was that effective?
- Summarize any decisions and actions
- Schedule follow-up discussions
- Communicate up and downstream

At this wall we see, learn and act.
But we don't talk about content for more than 5 minutes.

SOLVE PROBLEMS ROUTINE

Rhythm: 2x 15 minutes per week
Mentor & Improver
(this assumes you have created a storyboard and started with the improvement kata)



Mentor questions to improver (use the coaching kata card):

- What is your **Target** condition?
- What is your **Actual** condition now?
- What **Obstacles** do you think are preventing you from reaching the target condition?
Which one are you addressing now?
→ **reflection progress**
 1. What did you plan as your **Last Step**?
 2. What did you **Expect**?
 3. What **Actually Happened**?
 4. What did you **Learn**?
- What is your **Next Step**? (next experiment) What do you expect?
- How quickly can we go and see what we have **learned** from taking that step?

ACT & RESPOND ROUTINE

Rhythm: Mo, Tu & Th 13:00 - 13:30
Leadership Team + Coach (+ Requesters)

Goal

Act & respond to operational changes, requests and problems, while following up on relevant actions

Check-in

- Everybody present and focused? Things we should know about before we start? Shall we use last meeting's improvements?

Inbox

- Which new impediments must we solve?
- Which requests must we address?

Ongoing activities

- Per person:
 - Are we able to solve our existing problems and requests in acceptable time? Where is help needed?
 - Are there any developments our team or other teams must be informed about?

Close

- Did we follow the routine and was that effective?
- Summarize any decisions and actions.
- Schedule follow-up discussions.
- Communicate outcome up and downstream.

At this area we see, learn and act.
But we don't talk about content for more than 2 minutes.

DOWNLOAD THE MEETING ROUTINES HERE: [HTTPS://LEADINGWITHOBEYA.COM/DOWNLOADS/](https://leadingwithobeya.com/downloads/)

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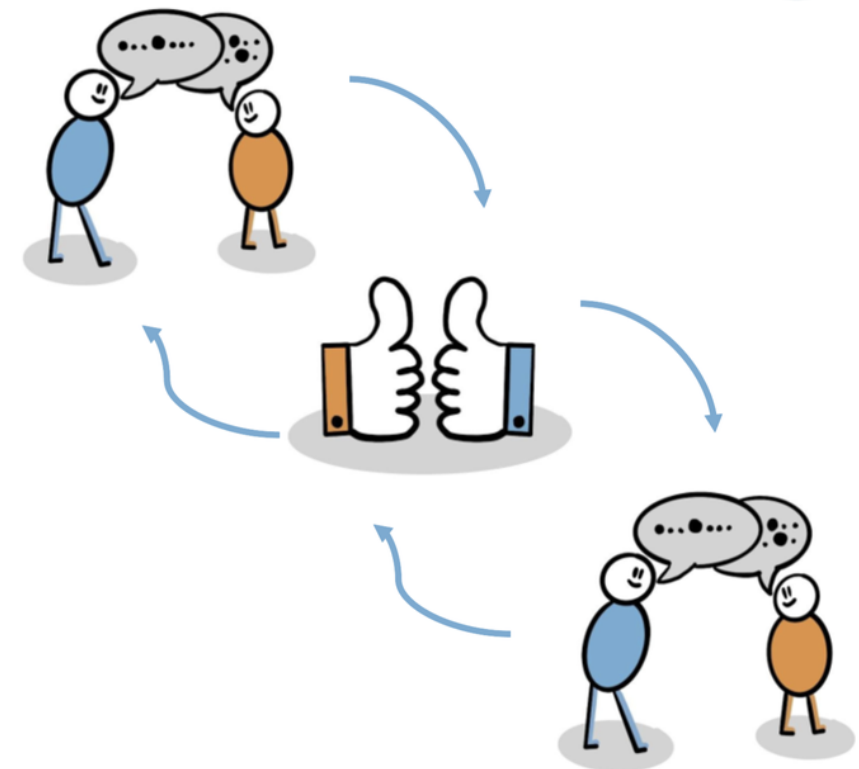
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A performance dialogue is essential to reach goals together

In an Obeya, a performance dialogue is a discussion or meeting that focuses on the performance of a team or project. It is an opportunity for team members to review progress, share updates, and identify any issues or challenges that need to be addressed in order to achieve their goals.

In an Obeya performance dialogue, there are several key elements that typically occur. These include:

- **Reviewing progress:** This involves reviewing the progress made towards the team's goals since the last performance dialogue. This may involve reviewing data or metrics, such as project milestones, productivity, or customer satisfaction.
- **Sharing updates:** Team members may share updates on their work, including any challenges or successes they have experienced.
- **Identifying issues:** The team may identify any issues or challenges that are impacting their ability to perform effectively. This may include resource constraints, technical problems, or other barriers to progress.
- **Brainstorming solutions:** The team may work together to brainstorm potential solutions to any identified issues.
- **Assigning action items:** The team may decide on specific action items or tasks that need to be completed in order to address any issues and make progress towards their goals.
- **Reviewing action items:** The team may review the action items that were assigned in the previous performance dialogue to ensure that they have been completed or are on track to be completed.
- **Setting goals:** The team may set new goals or targets for the next performance dialogue period.



Overall, the goal of a performance dialogue in an Obeya is to ensure that the team is working effectively and efficiently towards their goals, and to identify and address any issues or challenges that may be hindering their progress.

A performance dialogue is about
achieving goals together

An Obeya performance dialogue is about deviations from the norm/standard

Obeya has many visual cues for its attendees to recognize when things are not working according to plan. 'Not according to plan' means operational performance, change agenda's etc. are deviating from set norms or standards.

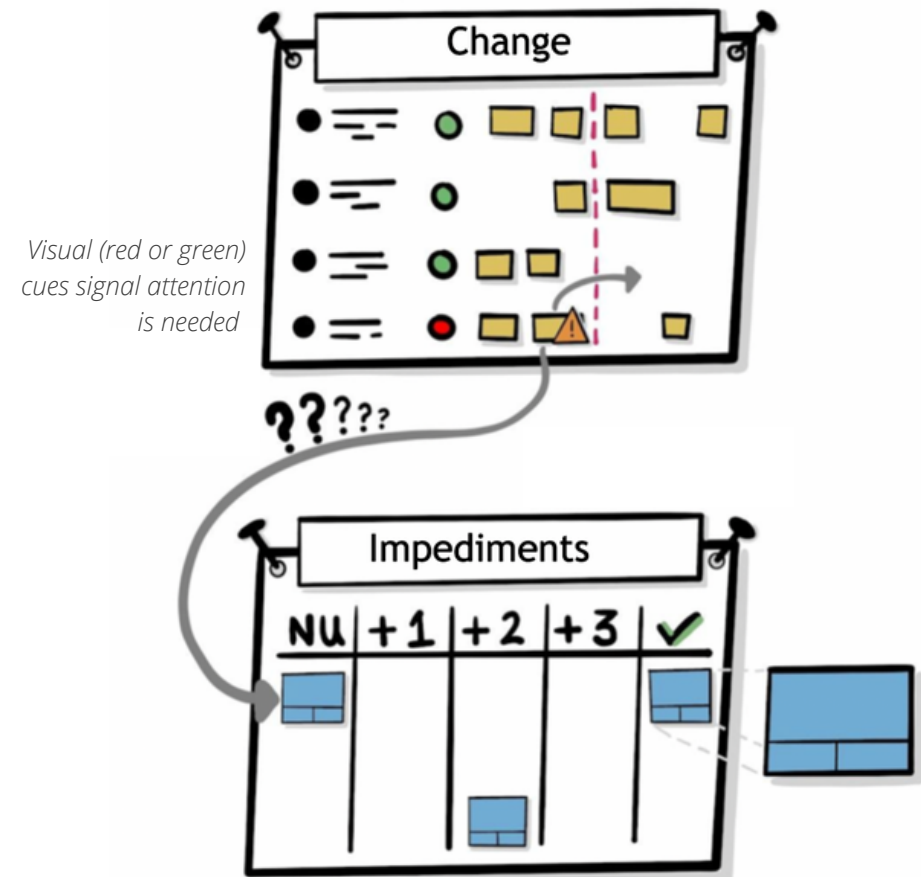
Signalling colors red and green are used to show where attention is needed.

Red doesn't mean someone did a bad job; it means the system is not delivering what we would expect and that we should investigate. When this happens we often call this an impediment or blockage.

Sometimes blockages/impediments are not visible in the Obeya through the visual management system. They can be noticed and brought up by:

- Obeya attendees
- Other departments
- Clients
- Suppliers
- Other stakeholders

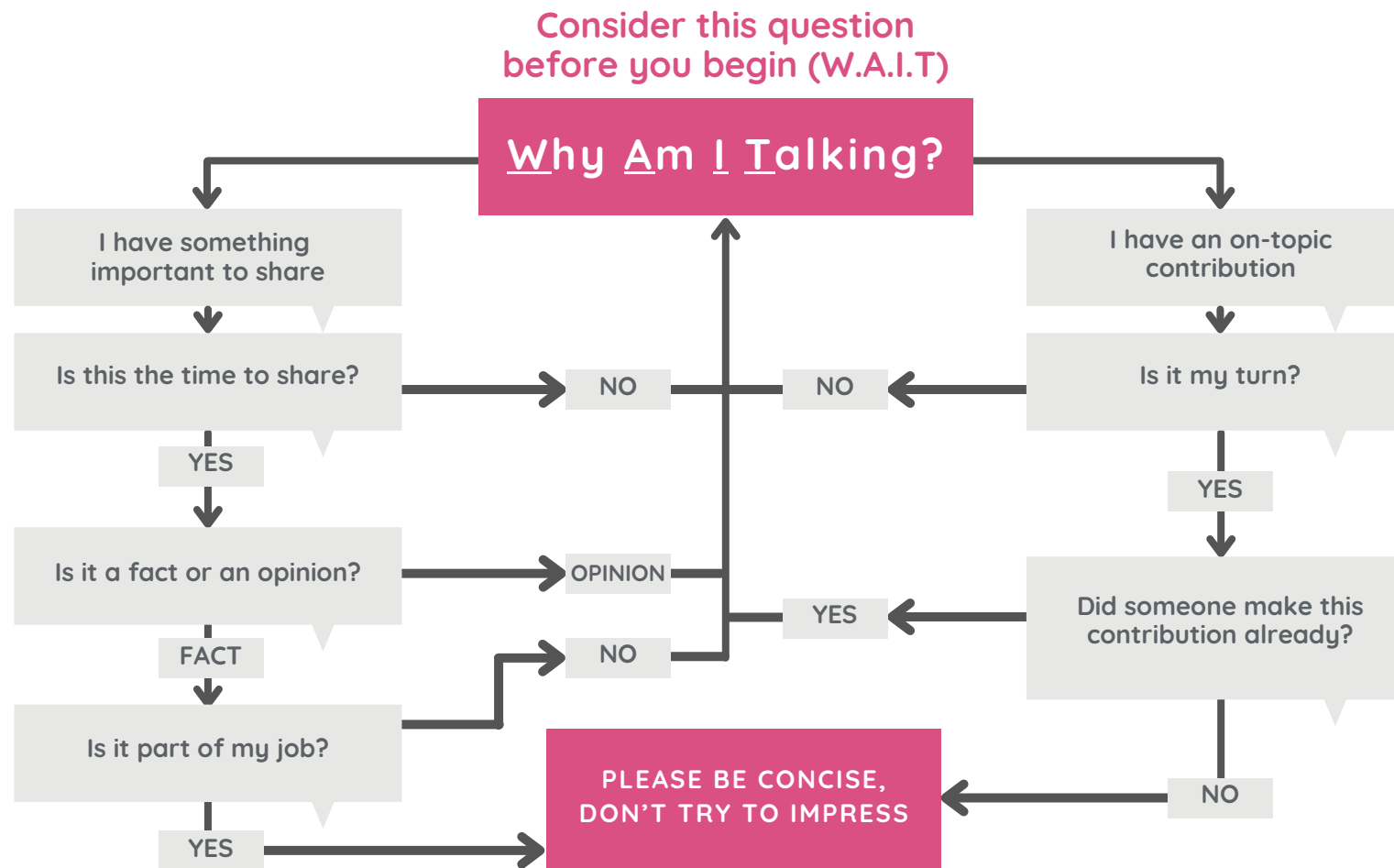
For an Obeya to work it is important that all relevant things that keep us from performing according to plan are communicated.



Red doesn't mean someone did a bad job; it means the system is not delivering what was expected and the item should be investigated

Conversational maturity

In an Obeya many perspectives and information sources are involved in limited timeframes. It is very different from a chat at the coffee machine or even a regular meeting. All participants need to be mindful of their contributions.



Mindset, behavior and discipline

Obeya is all about doing. A perfect Obeya without people with the right mindset, putting it to use, is just a waste of space. But to get value out of your Obeya, you will need to put in some work first and maybe even change old habits. At times, especially in the beginning, discipline will be required.

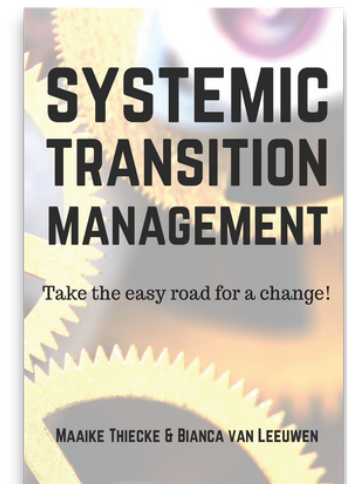
Most people don't like to change behaviors. And certainly nobody likes being changed by others. We would advise not to forget the behavioral change part of the Obeya build process. And to discuss desired Obeya behavior in full transparency. A healthy way to approach what an Obeya needs in terms of behavior starts with being aware of what factors are in play when it comes to changing behavior. The schedule on the next page provides you with grip on this process.

How to change from A to B

Starting with Obeya is more than creating an Obeya Room. Often it means a radical change in decision making, introducing new processes, software tooling and ways of working. This 'surface current of change' is necessary, but not enough to truly invoke behavioural change as well.

A change from the current state ('A') to a desired situation ('B'), can only be succesful if people make a transition in mindset & behaviour as well. This 'undercurrent of change' always follows a number of distinct phases, can be observed, predicted and can therefore also be managed.

Without a clear vision on why the Obeya is needed, there will not be any motivation, urgency or reason to truly change. This will only happen when the desired situation ('B') is chrystal clear in terms of specific and observable behaviour. Which is why it is important to formulate your Obeya Purpose as a starting point on your Obeya journey.



The book 'Systemic Transition Management' by Maaike Thiecke & Bianca van Leeuwen can provide insights on dealing with the psychological aspects of change.



From experience:

New things are often exciting, but also means leaving some old things behind. There is some "pain" in transitioning from A to B. Upfront and transparent conversations about what's likely to get left behind can smoothen inconveniences later in the process.

SURFACE CURRENT OF CHANGE

EXAMPLES:



(PROCESSES, SYSTEMS, GOVERNANCE, ETC)

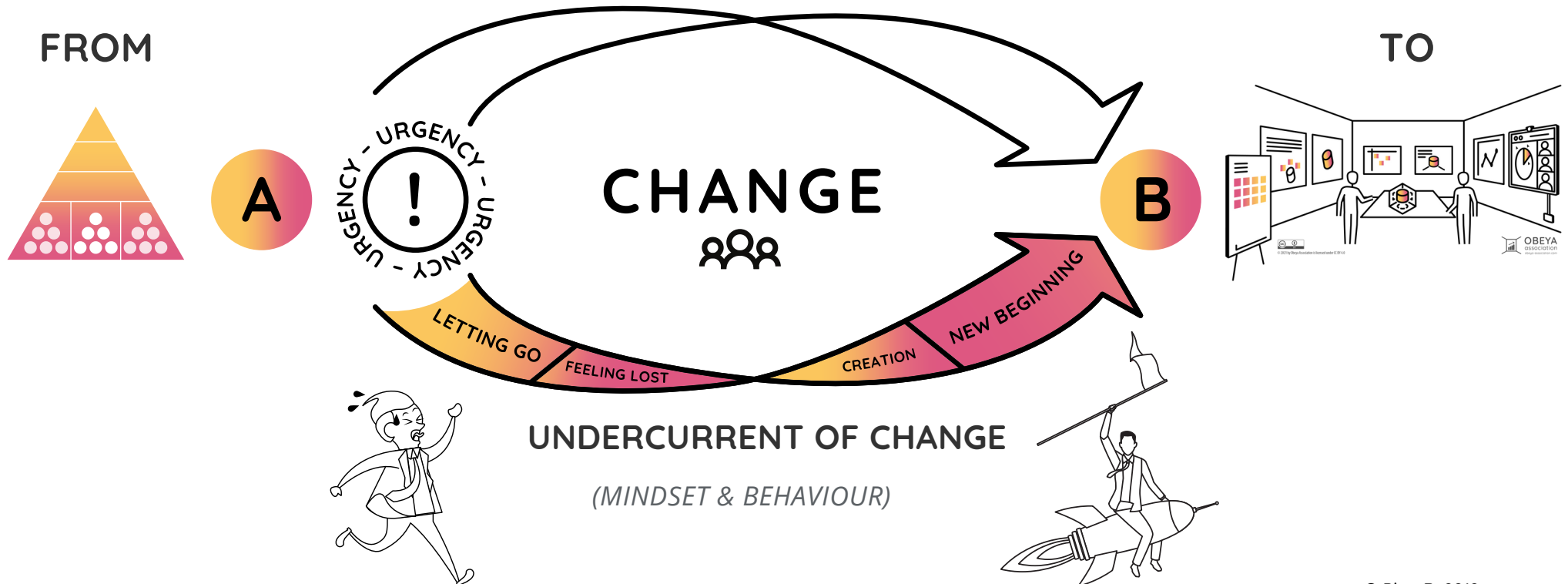
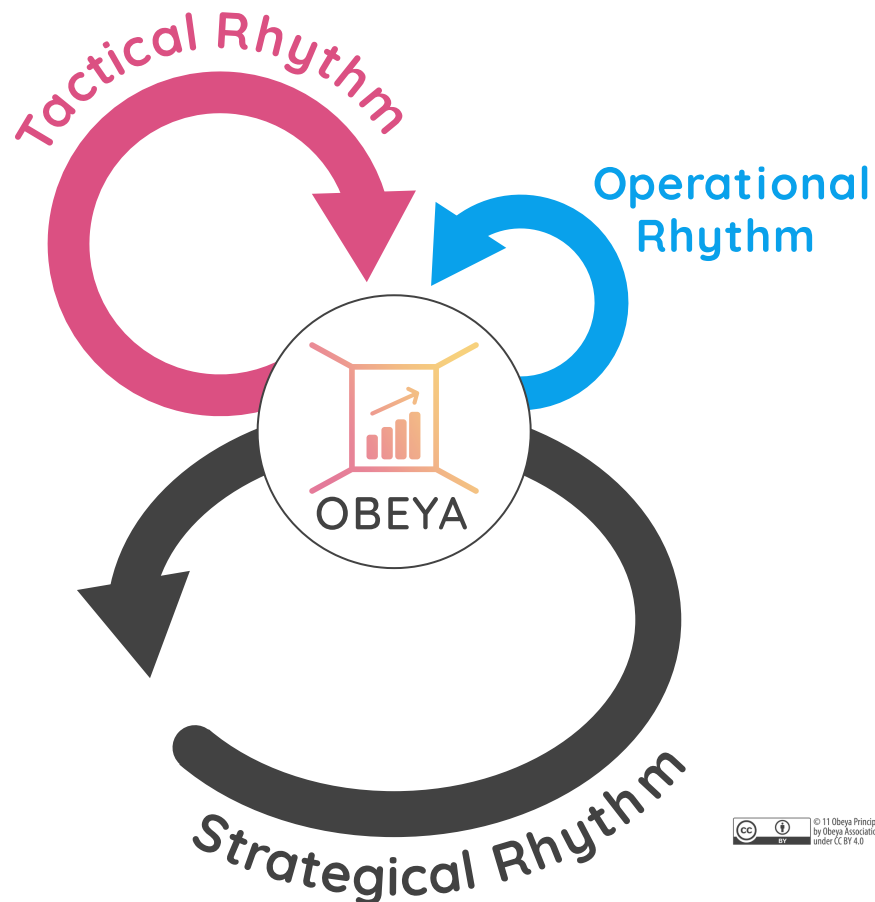


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An organization can be effectively aligned with an obeya when 3 rhythms are combined into fast decision cycles and accelerated learning



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1 STRATEGICAL RHYTHM (i.e. quarterly)

- True North
- Explain Vision
- Long term Alignment
- Customer Focus
- Empowerment
- Seize Opportunities
- Transparency
- Stability

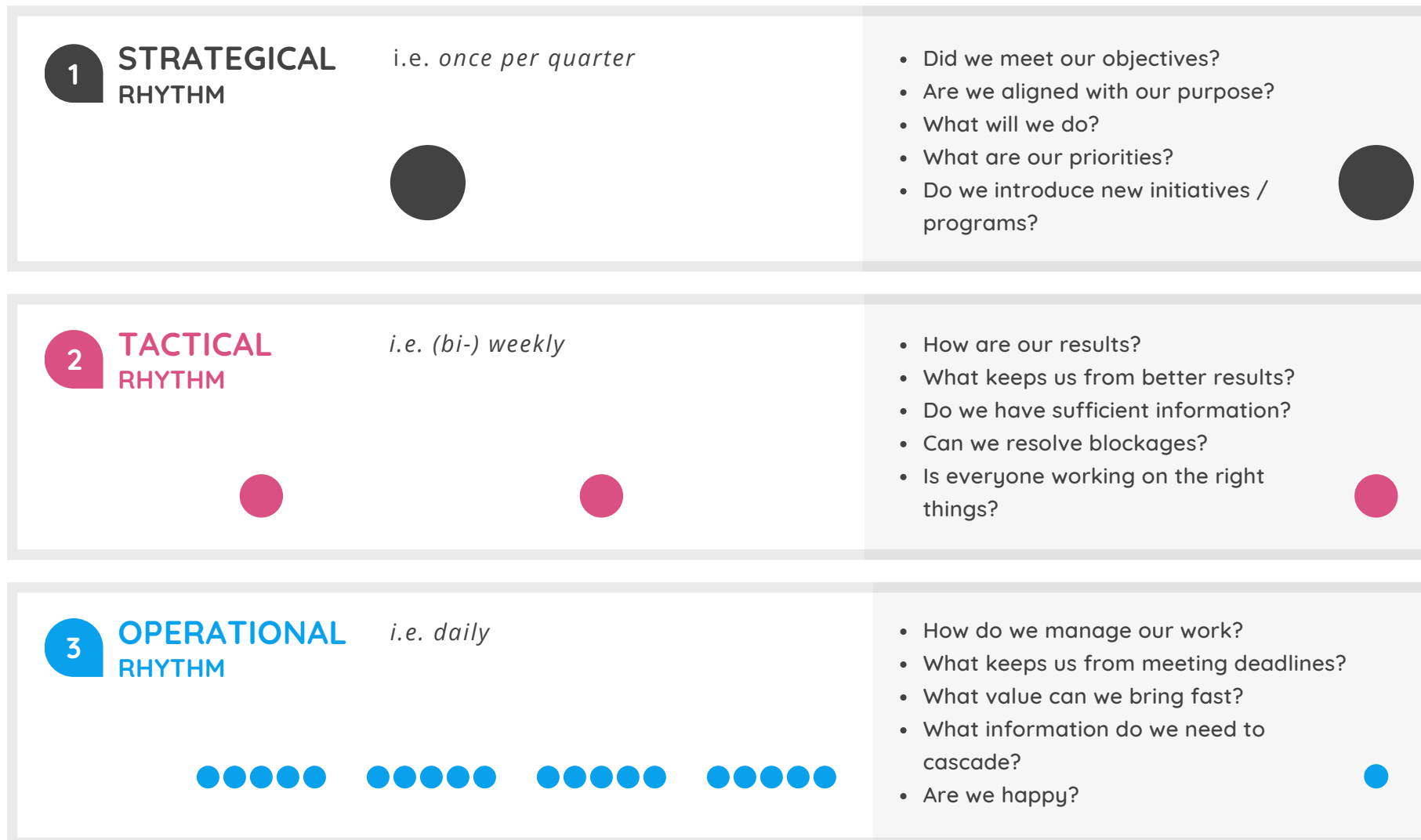
2 TACTICAL RHYTHM (i.e. biweekly)

- Data Driven Decisions
- Problem Solving
- Coaching
- Information Collection & Distribution
- Short Term Partnering
- Capacity Management
- Roles & Responsibilities

3 OPERATIONAL RHYTHM (i.e. daily)

- Manage Workload
- Rapid Iteration & Experimentation
- Deliver & improve Tangible Results
- Teambuilding
- Knowledge Management
- Data Collection
- Conflict Resolution

A responsive Obeya system connects strategy to execution



Large organizations use a network of Obeya rooms

An Obeya can be built out into a network of rooms within larger organizations. You can work with physical rooms, digital rooms like or create a hybrid combination. Physical advantages can often be found when human connection is needed. A digital network of rooms has advantages in cascading information when the rooms are all connected.

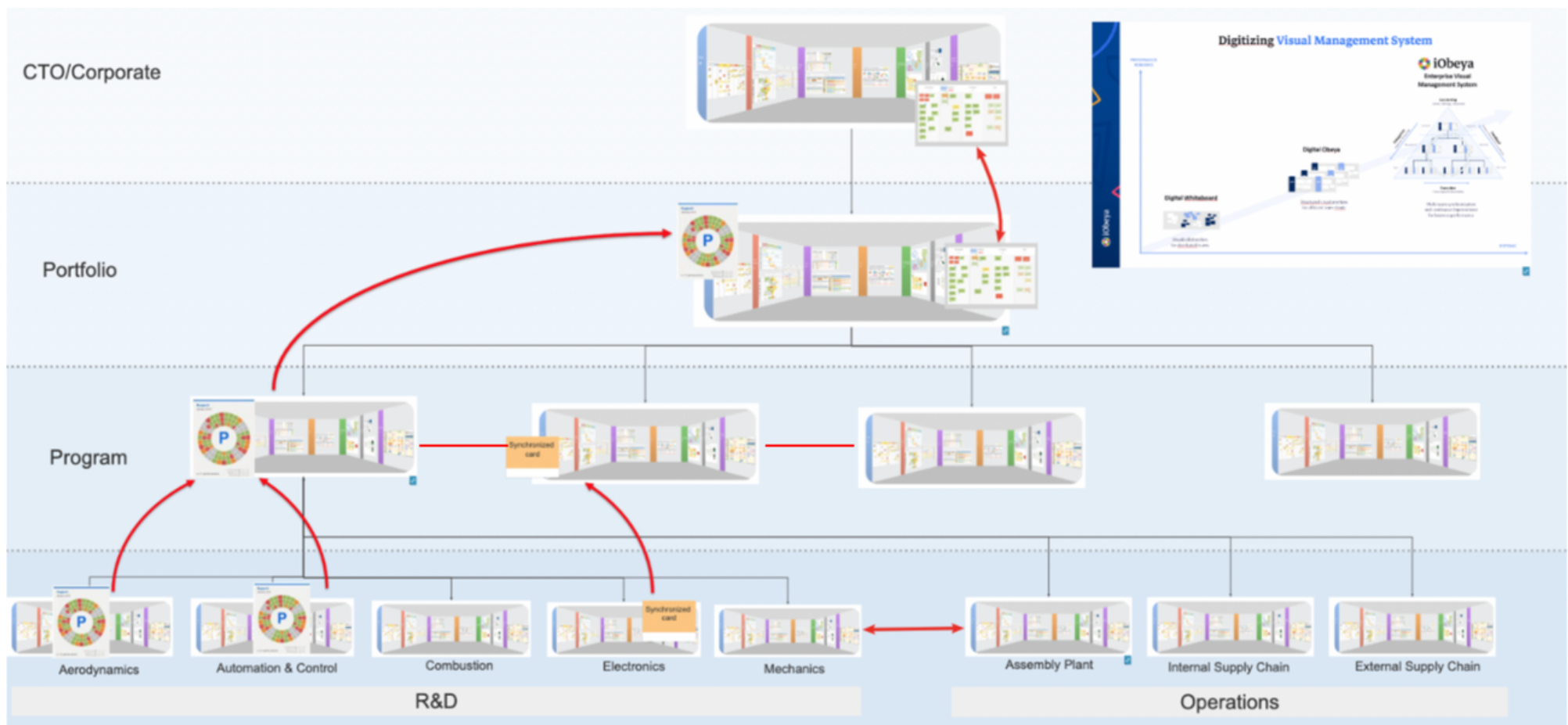


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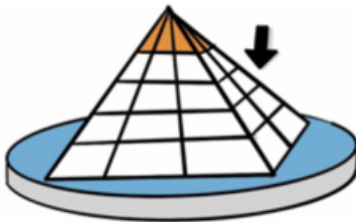
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An Obeya can be initiated from different parts of the organization

Obeya's for different purposes are likely to get initiated by different parts of the organization. Aiming for improvement in the value creation process probably leads to Obeya initiation on the work floor, whereas programs regarding the cultural values of the whole organization are likely to get initiated by leadership. Issues regarding departmental cooperation ask for horizontally oriented Obeya.

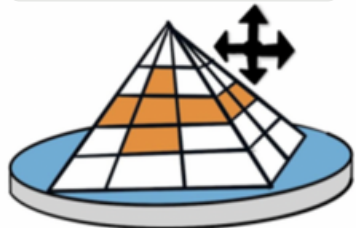
Leadership



Obeya initiated by leadership

- + Strong link with strategic ambitions
- + Decision authority
- Disconnected from work floor

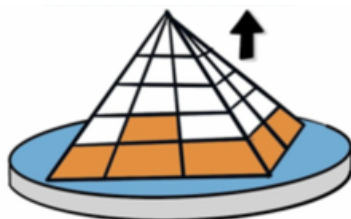
Department (s)



Obeya initiated by department(s)

- + Connection to both leadership and work floor
- + Horizontal connection opportunities
- Harder to get the right setup (scope) working and information updated

Work floor



Obeya initiated on work floor

- + Close to value creation process
- + Overview on complete value streams
- Distance to leadership needs to be bridged

Starting with Obeya: fast or slow?

When it comes to changing from one way of work to another, there will be some level of change management required. As people work in a system that wants to return back to its status quo, it can pay off to consider your strategy: fast or slow. They both have their own (dis) advantages.

Big Bang



Alltogether at once

- + Reduce the amount of time that 'two systems' work alongside each other
- + Enjoy the benefits of dynamic/short-cyclical governance faster
- Stressful, reduces change capacity
- No opportunities to flush out 'beginners mistakes' before scaling up

Fased

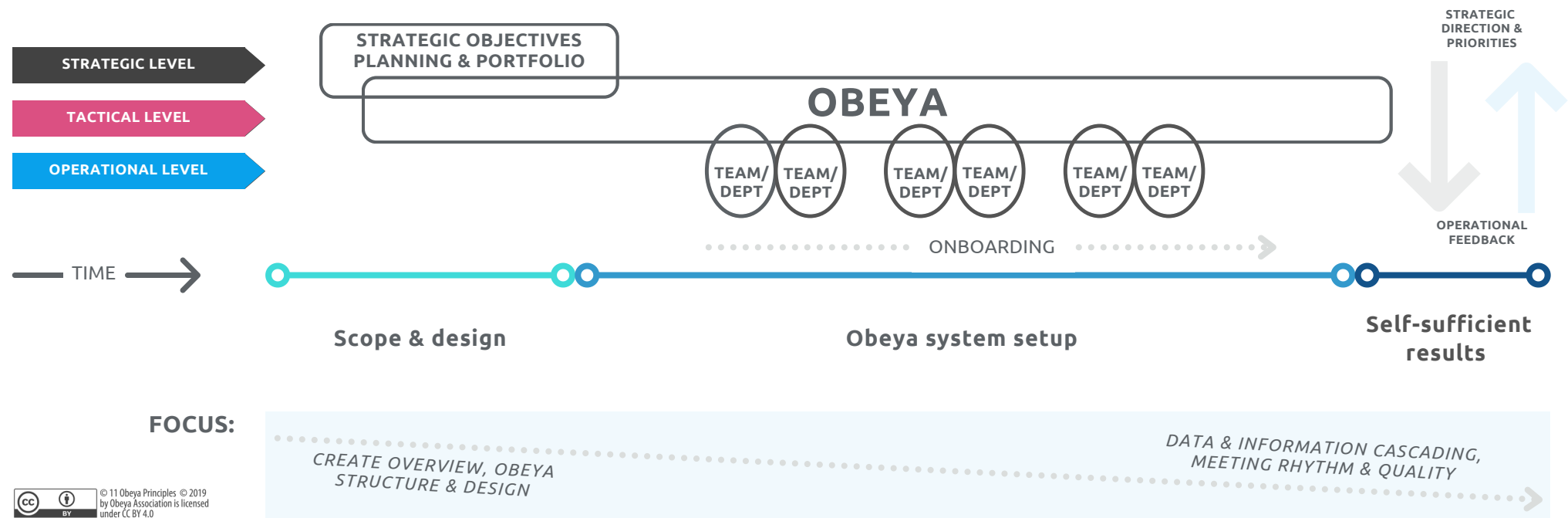


Start small, build on success

- + Experience together what works successfully and what doesn't work
- + Oil slick effect
- Two systems working alongside each other can create friction
- Takes longer / more discipline needed to get results

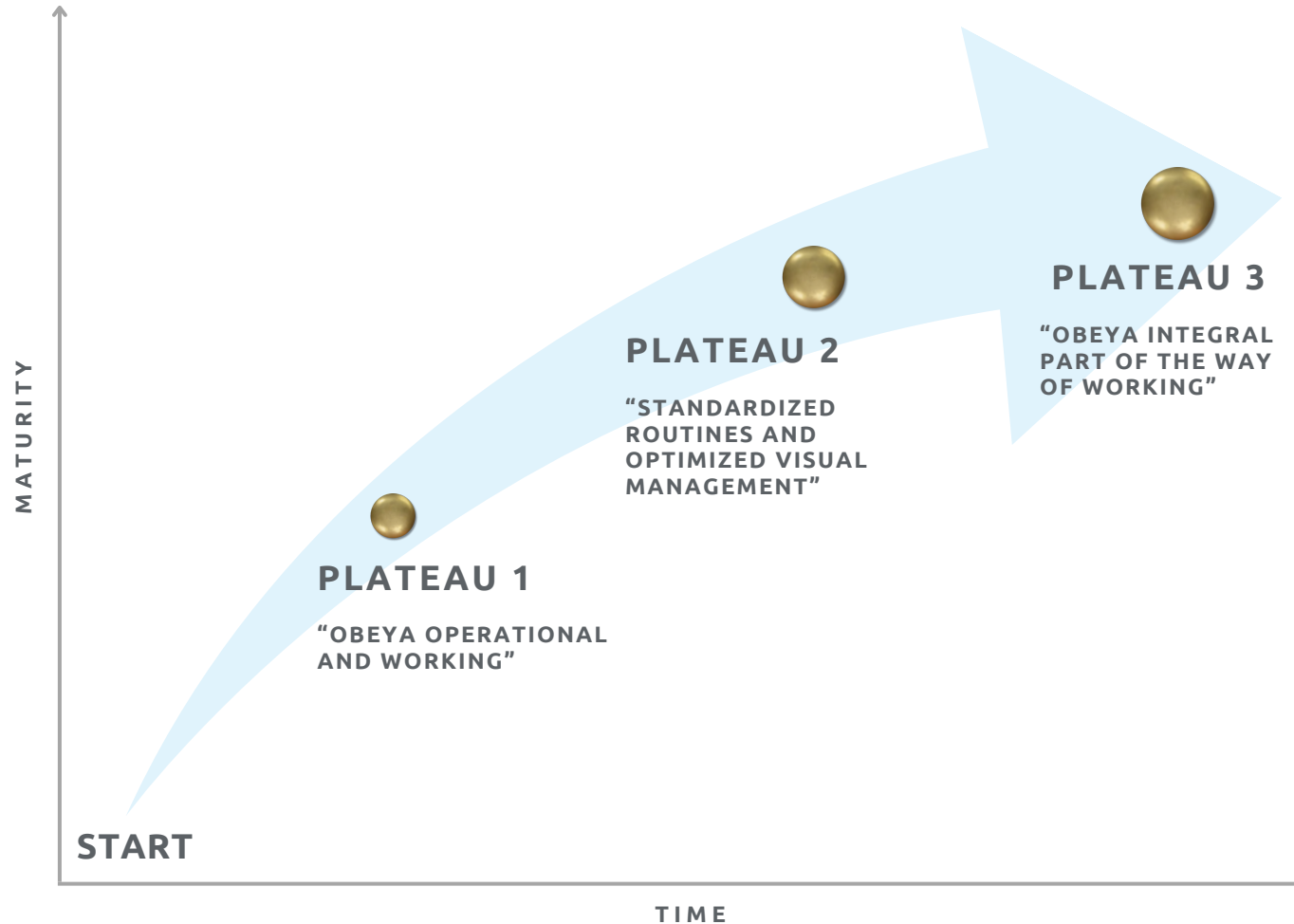
An example of how you could start with your Obeya

Underneath an example of how you could approach setting up an Obeya. This example clearly shows the choice of first figuring out higher level, strategic direction, before getting into a rhythm involving teams/departments and connecting strategy and execution.



From experience:

Starting is more important than getting it right. You will never get it exactly right! It is about engaging in an iterative process where your latest experience shows you the way forward. The only real mistake you can make is wait...



- ✓ Full Obeya structure in place (strategy, planning, performance, action, etc)
- ✓ Standardized routines and agenda's are visually present
- ✓ Transparency on performance and performance deviations
- ✓ Increased focus through dynamic quarterly goal setting
- ✓ Better prioritization
- ✓ Potential delays are anticipated
- ✓ Ownership has increased
- ✓ Set rhythm for Performance Dialogues
- ✓ Obeya roles are in place internally and Obeya professionals educated
- ✓ Obeya governance transferred to Obeya core team
- ✓ Obeya is visible within organization (i.e. gallery walks for new staff members, active internal communication on Obeya, etc)

Obeya is a reflection of your organization:
never finished and always continues to evolve

The ideal situation

In an Obeya you engage in participatory dialogue and experience psychological safety. In a relatively short timeframe information is transformed to learnings and then action/decisions are taken.

Decisions are factbased and committed. Having all relevant stakeholders present saves time in updating each other later.

There is a sense of connection and people get together behind a common goal. Successes are celebrated and problems quickly arrive at the level they need to be dealt with.

The meeting is structured and every perspective is honored. Feedback is provided and healthy friction is allowed to exist.

The Obeya meeting is positive and people are curious.

Conversation issues

There are a few common issues that prevent participatory dialogue and psychological safety from happening:

- Dominant people take over the meeting
- Time wasted on only updating each other
- Not everyone participates
- No action (too much reflection)
- Quick fixes (too little reflection)
- (personal) judgements
- (unchecked) assumptions
- Fears and limiting beliefs
- Unskillful disagreements
- Decisional powerplay
- Low data confidence

General issues

There are a few common issues that prevent an Obeya meeting from running smooth even when the conversation is constructive.

- Data/information is not updated
- Data too high level to act
- Data too detailed (confusion)
- People are late
- People not present
- People are unprepared
- Messy Obeya room
- Technical malfunctions
- Lack of leadership involvement

From experience:

An Obeya exposes many things. At times you might experience a feeling that your Obeya is "wrong" or "unfinished". But actually: you might be moving in the RIGHT direction. Creating transparency on what's NOT there is an equally important part of the process. It is one of the problems that you can now solve.

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WE ARE A NETWORK OF PRACTITIONERS,
BUILDING AND DEVELOPING CASE ORIENTED
KNOWLEDGE CONSOLIDATED
INTO A CONTINUOUSLY ENRICHED

About the Obeya Association

The Obeya Association is a community (or “Association”) where Obeya knowledge is developed and experiences are shared. Our platform obeya-association.com accommodates a home for Obeya practitioners worldwide. Obeya allows organizations to develop a level of consciousness and capabilities they can use to make better decisions.

We provide all practitioners with the means necessary to work with Obeya effectively. The ultimate aim is to contribute to sustainable and inclusive decision making, benefitting a world in which organizations positively contribute to their surroundings.

We consolidate Obeya experiences and use cases into this body of knowledge on effective Obeya practice.

Then we return this information back into our worldwide network of Obeya Associates. Through this constant cycle we create a dynamic Obeya framework that provides a foundation to work with Obeya.

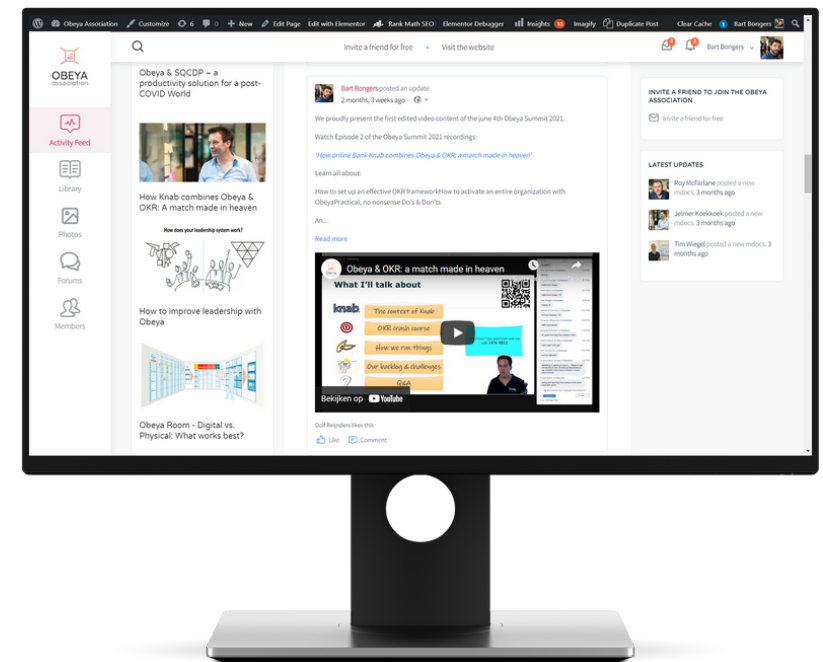
FOUNDERS OF THE OBEYA ASSOCIATION



BART BONGERS



DOLF REIJSNDERS



As Obeya Associate you can login on the Obeya Association platform and exchange experiences with Obeya practitioners from around the world, visit the Obeya Summit or browse the largest Obeya library in the world.



CHECK OUT THE STORY OF
THE FOUNDERS OF THE
OBEYA ASSOCIATION AND
MORE OBEYA CONTENT ON
OUR YOUTUBE CHANNEL



OBEYA
association
obeya-association.com

PURPOSE ‘Create conscious organizations capable to build a better world for future generations.’

MISSION A community of Obeya professionals that help organizations set up Obeya’s that lead to sustainable and inclusive decisions.



- 1) Dedicated and motivated Obeya professionals
- 2) A vibrant international Obeya ‘friends-of-friends’ platform where Obeya professionals can help each other out and experiences can be shared
- 3) Professional & personal growth through valuable and practical Obeya content

VISION With the world growing increasingly complex and the stakes higher than ever before, organizations need a business philosophy that help them deal with said challenges.

Obeya proposes to include perspectives and information sources, devote resources for preparedness and build up empirical data when moving into the necessary unknowns that will shape our future. Organizations need the horizontal connections that Obeya creates, so we can learn and adapt as a collective.



The Obeya Association is a proud member of the 1% for the planet movement and dedicates 1% of its annual revenue to carefully selected causes.

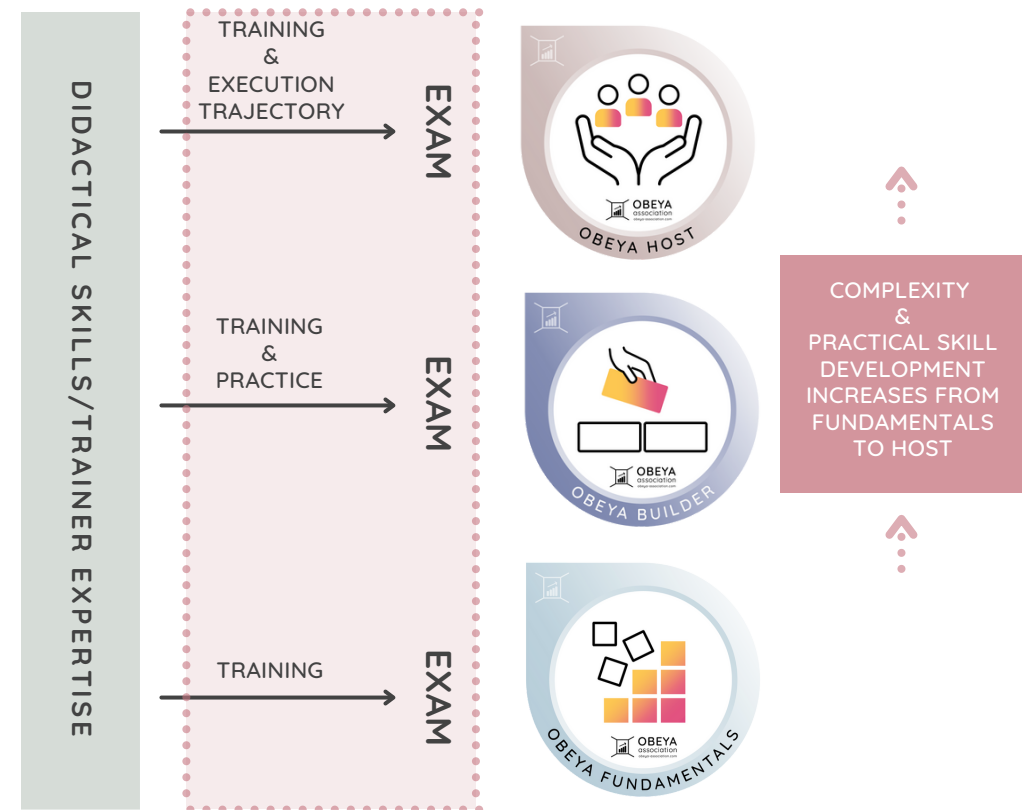
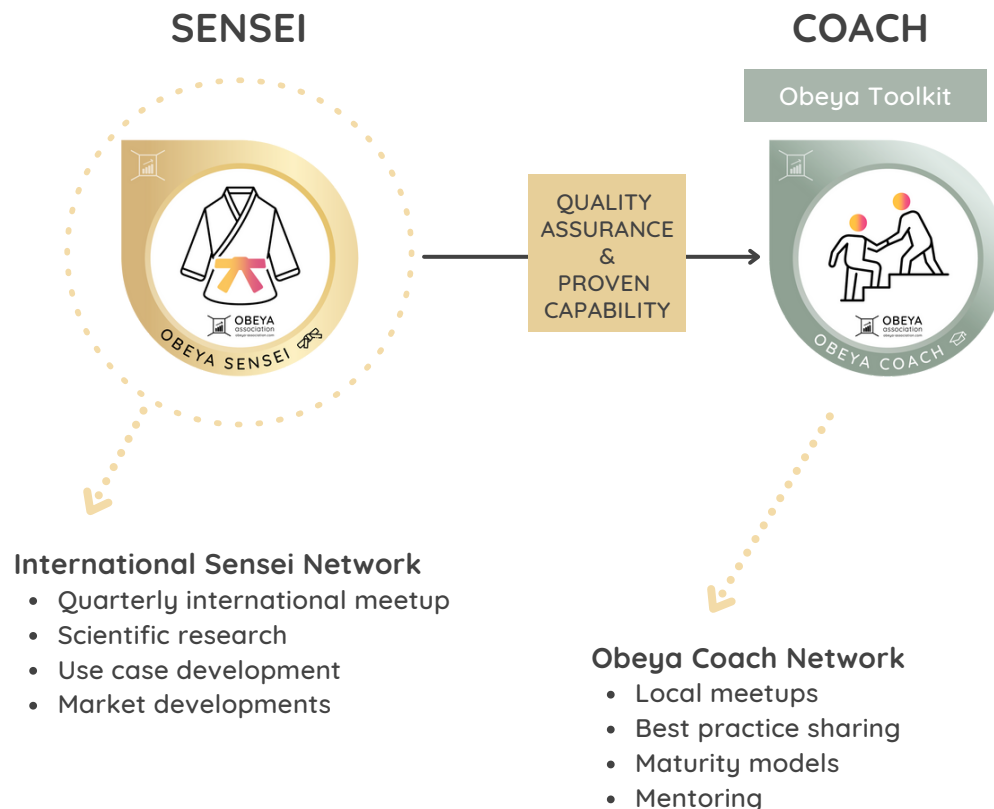


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The Obeya Coach is your local helping hand

An Obeya Coach has your best interest at heart, both from a human and from a professional point of view. He or she is educated to maximize the positive impact of the group of Obeya professionals surrounding him/her. This duty surpasses organizational interests.

Obeya Coaches are in close contact with other Obeya Coaches and therefore on the forefront of best practices and most recent developments. In turn, they receive mentoring from their Obeya Sensei, connecting them to the worldwide Obeya network.



Enabling Obeya Roles

Getting the best out of your Obeya requires specific expertise and skill. Skilled Obeya professionals anchor Obeya in your organization and provide discipline needed to achieve long term benefits.

Two important competency area's can be defined that make an Obeya work, summarized in two essential Obeya roles: 'Obeya Builders and Obeya Hosts'. Obeya Builders are trained in building Obeya rooms that are fit for purpose. Hosts are trained to use the room for collective group learning and sustainable decisions.

They can count on guidance and counseling from an experienced **Obeya Coach**. Coaches create cultural, behavioral and change awareness and accelerate the learning and Obeya evolution. They focus on the organizations bigger picture. They are linked to local Obeya Coach networks and share best practices across different organizations.

The Obeya Coach network is connected to the international network of **Obeya Sensei's**. They are highly respected individuals with a remarkable standing within Obeya evolution.

Roles should not be regarded as an introduction of hierarchy within the Obeya. It is important that in an Obeya all participants and visitors can think and speak freely, so experience and knowledge can thrive.



Obeya Builder

Organizes the evolution of the actual Obeya space, Obeya content and the Obeya's position in the organizational context & infrastructure.



Obeya Host

Aids and develops Obeya meeting interactions. Turns learnings into sustainable decisions through informed conversation.



Obeya Coach

Coaches and educates Builders and Hosts. Guides Obeya implementation towards cultural and behavioral change and awareness.



Obeya Sensei

Leading the evolution of the field. Exceptional wisdom and expertise in the area of Obeya. Authority both within and outside of the community.

From experience:

"Appoint Obeya champions and/or educate Obeya Hosts and Builders. People that understand the organization, strategy, culture and structure. Who can organize the implementation of an Obeya. Who are skilled at hosting Obeya sessions. These people ensure the discipline and rigor needed for an Obeya to provide meaning and get the Obeya well anchored in your organization."

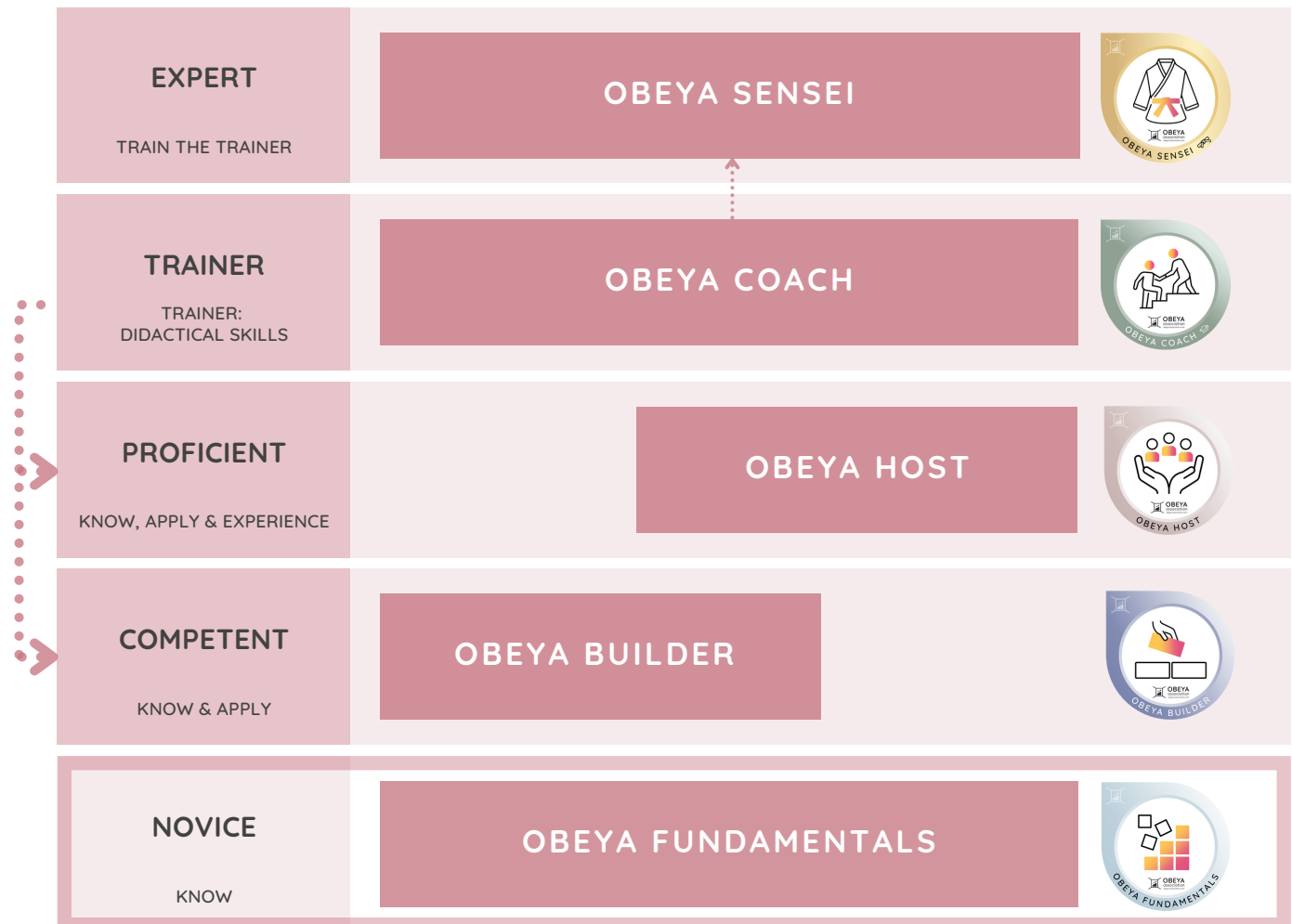
Obeya professionals demonstrate knowledge, skills and experience

Obeya as a business philosophy is meant to help organizations deal with real challenges in an increasingly complex world. Our Obeya purpose requires highly motivated professionals that can lead the way towards sustainable and inclusive decision making.

This is a journey we take very seriously and therefore the development path of an Obeya professional is ambitious.

An Obeya is a very true and real reflection of the work-floor - therefore Obeya knowledge is always combined with practical skills, built from experience.

Your teachers are experienced Obeya practitioners only. People dedicated to build a better world and eager to help you to become a powerful member of our community and start making positive impact.



Qualification specifics and requirements

Purpose of the Obeya Fundamentals Qualification

The purpose of the Obeya Fundamentals qualification is to confirm that a participant has sufficient basic knowledge and understanding of the Obeya approach and is able to identify this in a working Obeya.

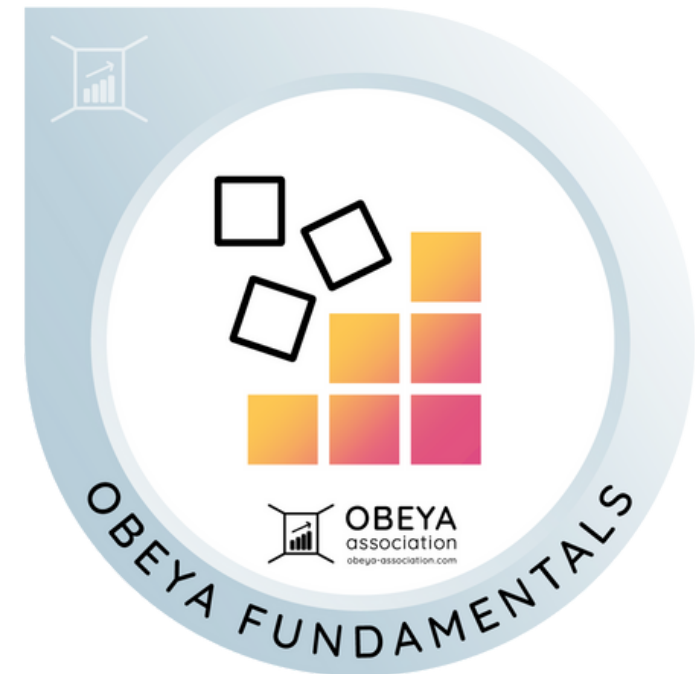
Target Audience

- Any professional participating in an Obeya
- Any professional aspiring to bring value to their organization

Performance definition of a successful Obeya fundamentals candidate

Upon completion of the course and successful passing of the consecutive examination, the participant will be able to reproduce and identify:

- How continuous improvement and Obeya are linked throughout history
- The insight of when and why an Obeya can be successful
- The prerequisites for effective Obeya practice
- The 4 quadrants and The 11 Principles that define an Obeya
- The different roles participating in an Obeya and their application
- Basic understanding of visual management setups in an Obeya
- Basic Obeya meeting rhythms and routines
- Basics of an Obeya performance dialogue



Passing the Examination

The requirements for the Obeya Fundamentals certificate are:

- Successful completion of the Obeya Fundamentals exam
- The pass rate of the exam is 70%
- The exam has 30 questions. This means that 21 correct answers are required to successfully complete the exam

While we have designed this module based on our own experiences and the knowledge provided by the Obeya Association network, we have learned much from these amazing authors and their works. The content that the Obeya Association provides is constantly revised, updated and enriched. We highly recommend reading these works to get a deeper understanding of Obeya Fundamentals.

Obeya

- Everyone Obeya (2019), Jeroen Janssen (Dutch only)
- The collaboration equation (2022), Jim Benson
- Leading with Obeya (2021), Tim Wiegel

Obeya meetings

- W.A.I.T. c 2016 Oisin Grogan. All rights reserved.
<https://www.vworkteam.com/blog/sick-of-wasting-time-in-meetings-try-this>

Starting with Obeya

- Systemic Transition Management. Take the easy road for a change! (2017), Maaïke Thiecke and Bianca van Leeuwen
- Coaching Agile Teams (2010), Lyssa Adkins

Obeya History

- Why Obeya is more than a Visual Management tool (2022), Tim Wolput
- The new new product development game (1986), Hirotaka Takeuchi and Ikujiro Nonaka
- The machine that changed the world (1990), James P. Womack, Daniel T. Jones and Daniel Roos
- The analects of Confucius (475 - 221 BC)
- The secret history of Agile Innovation (2016), Darrell Rigby, Jeff Sutherland and Hirotaka Takeuchi
- SCRUM development process (1995), Ken Schwaber
- Statistical method from the viewpoint of Quality Control (1939), W. A. Shewhart



FOR MORE IN DEPTH AND PRACTICAL OBEYA EXPERTISE CHECK OUT THE OBEYA HOST AND THE OBEYA BUILDER MODULES IN THE OBEYA ASSOCIATION LIBRARY.



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