

Daily board: measure, respond, learn

Turn a plan-versus-actual gap into an owned response, use escalation when authority is missing and close only when the receiving team sees evidence.



The message was sent; the blocker remains

Fictional dispatch huddle: the team planned 24 ready orders by 09:00 and has 18. Four orders await missing labels and two await customer clarification. Yesterday's board marked a label issue escalated but the support response never returned.

Your role and the reference condition

Dispatch lead and named support owners for label service and customer clarification.

Normal: The board shows expected result, actual condition, priority gap, next owner and review evidence.

Gap: Six orders are not ready; a sent escalation is being treated as closure.

Work within these conditions

1. Ready means all defined checks complete, not merely packed.
2. Do not spend the whole huddle solving every cause; assign focused work and a return point.

Fictional teaching case. Supplied observations support the exercise; proposed actions are not verified customer results.

See how the method works

A daily board should make an important gap visible and connect it to a response. Compare actual performance with a meaningful standard, identify the issue requiring action, and record an owner and review time. Escalate barriers that the team cannot remove, then bring the answer back. Verify whether the condition changed rather than closing an item because an email was sent. Preserve urgent response routes outside the meeting. Repeated gaps may need a deeper investigation. A board full of green indicators is not proof of stability if people have learned to hide exceptions or change the counting rules.



Connected method map: Plan / standard, Actual / gap, Response, Escalated support, Closure evidence. Every authored connection is shown with a numbered arrow and named legend.

Follow the evidence and decisions

Inspect the supplied case inputs

09:00 status	Count / evidence
Plan	24 ready orders
Actual ready	18
Missing labels	4 orders; identities retained
Customer clarification	2 orders; identities retained
Yesterday's escalation	Message sent; no acceptance or resolution evidence

01 / Make the gap specific

The lead records 24 planned minus 18 ready equals 6, then separates four label-blocked orders from two clarification cases.

Why: A red total alone does not show what support is needed. The categories reconcile the gap without hiding different owners.

Evidence / check: Every blocked order has one current primary blocker and an identity.

02 / Assign the next action, not just a name

The label coordinator checks service status and requests support acceptance; the customer liaison seeks the missing information for the other two orders. Each action has a review time.

Why: An owner label without the next evidence leaves the board as reporting rather than control.

Evidence / check: Label support reviews at 09:20; clarification at 09:30 in this fictional routine.

03 / Escalate the authority gap

Because label restoration lies outside the dispatch team, the lead seeks an acknowledged support commitment and raises nonresponse through the next level.

Why: Escalation moves a need to the authority that can act; forwarding an email does not show that authority accepted it.

Evidence / check: Receiving owner, expected response and review point appear on the board.

04 / Verify at the work and return to the board

After support reports recovery, the team checks the affected label outputs and readiness requirements before changing order status. It records any unresolved cases and learning for the next huddle.

Why: The support task and the customer/work outcome are different closure tests.

Evidence / check: Order-level readiness evidence returns to the board; next-day review checks recurrence.

Completed huddle response plan - outcomes pending

Gap	Owner / next action	Review / closure evidence
4 missing labels	Label coordinator + accepted support owner	09:20; correct labels on affected orders
2 clarifications	Customer liaison obtains missing details	09:30; complete confirmed order information
No escalation acknowledgment	Lead seeks next-level support	Named receiving commitment
Total 6 not ready	Lead reconciles order status	Ready only after defined checks

Support says fixed but one order still fails

A fictional 09:20 review finds three label-blocked orders ready but one label remains incorrect. The two clarification cases are still open.

Decision

Update actual ready to 21 and retain three unresolved orders: one label plus two clarifications. Reopen or continue the specific label response.

Reasoning

A broad fixed message must not turn all four orders green.

What would change the decision?

$18 + 3 = 21$; $24 \text{ minus } 21 = 3$. Order identities and the failed label evidence remain visible.

Practise with a changed case

A partly successful response

New fictional team planned 15 complete referrals and has 11. Three await a receiving acknowledgment; one has incomplete information. At review, two acknowledgments arrive and are verified; the third and the incomplete case remain unresolved.

State	Count
Plan / initial actual	15 / 11
Acknowledgment blockers	3
Incomplete information	1
Verified newly ready	2

Your task

1. Reconcile initial and revised gaps.
2. Write separate remaining actions with receiving owners and evidence.
3. Explain why sent reminders are not closure.

Use the next page to record your reasoning before reading the answer.

Your practice worksheet

A partly successful response

Plan / actual / gap

Blocked identities and category

Owner / accepted support

Review time

Verified change / remaining gap

Complete your reasoning before turning to the answer. Use the separate learner workbook for group practice.

Check your reasoning and transfer it

1. Initial gap is four. Two verified changes raise complete referrals to 13, leaving two: one acknowledgment and one information gap.
2. The receiving team must confirm the remaining acknowledgment; the information owner must supply and verify required details. Reminders are actions, not proof of completion.
3. Review actual records and carry unresolved items honestly into the next cycle.

Suggested completed record

Measure / item	Result / next evidence
Revised actual	$11 + 2 = 13$
Remaining gap	$15 - 13 = 2$
Acknowledgment	One remains; receiver confirmation
Information	One remains; verified missing detail

Plausible wrong turns

1. Escalated is not resolved.
2. A changing total is not useful if blocked identities disappear.

Evidence of a sound answer

1. Reconcile counts without premature green status.
2. Name receiving authority and evidence.
3. Close the board-to-work-to-board loop.

Take the learning back to work

Commitment	Agreed follow-through
Owner	Frontline lead with receiving support owners
Record	Plan/actual gap board and linked action records
Review	At agreed intraday checks and next daily huddle
Verification evidence	Observed condition change, accepted escalation and correct remaining scope
If unresolved	Escalate missing authority/response and assign deeper investigation for recurring gaps.

Help someone else apply the method

Prepare

1. Order tokens and response board
2. Blank plan/actual/action record
3. Partial-recovery card

Minutes	Activity and coaching prompt
4	Define ready What does the actual count include?
7	Run a short huddle Who accepted the label issue?
8	Practice partial recovery Which identities remain open?
5	Debrief closure What must come back from support?

Debrief

1. Ask learners to point to the evidence behind a green status.
2. Keep the huddle focused on response and review rather than debating every cause.

Individual or remote practice

Use tokens to update each verified case, then reconcile the board total.

Connect the method and check its boundaries

Before application

1. Meaningful measures
2. Clear escalation ownership

Outside this lesson

1. All-green reporting can hide problems
2. Owner assignment is not closure

LEI: Daily Management and Hoshin Kanri

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Daily standards/abnormalities and strategic feedback; do not copy source diagram

Method reference; original OPEX scenario and diagram are synthetic teaching content, not source case results.

Open this lesson and its visual aids