

Steris Kaizen Management

Improving lean changes with user-focused design and ongoing progress tracking

By
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UX Lead

Tool used:     Jira

[Visit Prototype](#)



My Role and Contributions

As UX Lead, I led the team to improve user experience design and smoothly handle complex scenarios by collaborating with cross-functional teams.

UX Research Techniques used

- User Interviews
- Affinity Mapping
- Persona Creation
- User Journey Map Creation
- Usability Testing

UX Design Techniques used

- Wireframe Creation
- Hi-Fi Mock up
- Prototype

My contribution to design

◆ **Led user-centered design (UCD) process**

Conducted user research on key groups (facilitators, sponsors, team leads, developed personas and mapped as-is processes to identify pain points like manual tracking and poor visibility.

◆ **Oversaw ideation from needs to prototypes**

Built lo-fi wireframes and hi-fi prototypes with dashboards, query wizards, KPI scorecards, action plans, and integrations (Outlook, MS Teams, file sharing).

◆ **Drove implementation and results**

Led phased rollout, training, change management, and metrics—boosting productivity 40%, accessibility 20%, and form completion 80-90%.

◆ **Directed high-fidelity prototypes**

Included dashboards, customizable views, query wizards, KPI scorecards, action plans, search/filter tools (saved 35-40% time), and exports (PDF, PPT, CSV).

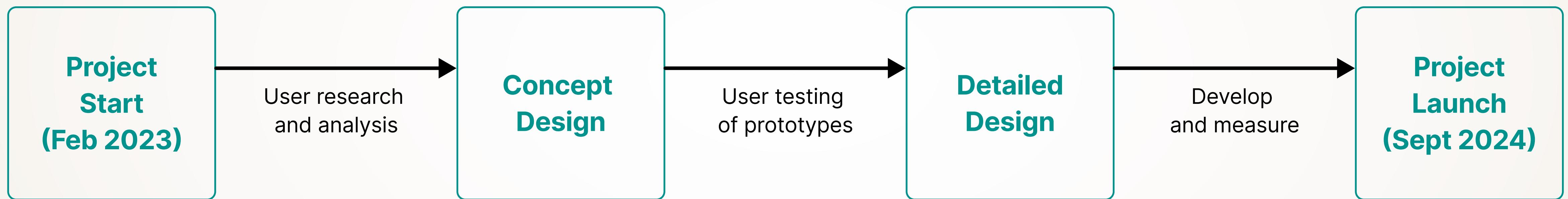
◆ **Added seamless UI integrations**

Added Outlook scheduling, MS Teams collaboration, file/link sharing, and automated notifications—boosting usability, accessibility (20% uplift), and cross-team execution.

Our Approach

We achieved successful Lean transformation by assessing needs, prototyping software, testing iteratively, training users, managing change, deploying in phases, and monitoring ongoing improvements.

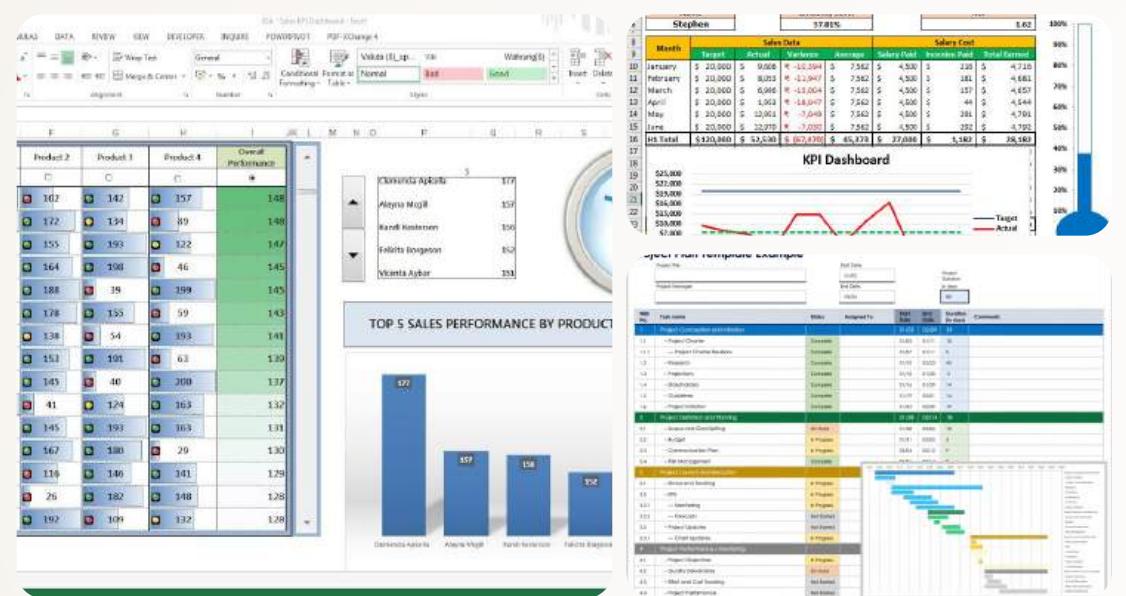
Our Work flow



Problem statement

“Scattered Kaizen data across sources led to inconsistent execution, poor visibility into improvements/coaching, weak accountability, and wasted admin time on planning, tracking, and impact assessment”

Issues Found



Steris faces challenges with Kaizen data scattered across multiple sources, leading to inconsistent execution



Limited visibility into improvements and coaching opportunities



Manual tracking difficulties



Wasted administrative time on planning, progress monitoring, and impact reporting

Impact

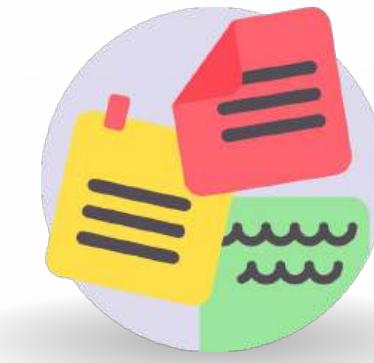
Without a centralized platform, teams struggle to hold accountability for event reporting and closure, hindering Lean practices adoption in growing businesses. This results in reduced engagement, inefficient resource allocation, and missed opportunities for business growth through continuous improvement.

How we arrived at the problem statement

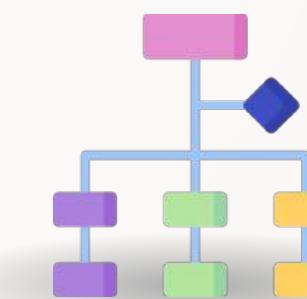
Conducted **User Interviews** among different user groups



Using interview data, **Affinity Mapping** was used to identify personas, user journey maps and their associated pain points.



With the help of their pain points and user journey milestones **user flow (system design)** was created



User Interviews

User interviews involve engaging diverse client groups to uncover their pain points and map their user journeys via team interactions.

User groups identified during their interviews

SPONSORS

They are invited during event creation to align on timelines, problems, and deliverables with team leads and facilitators.

FACILITATORS

Facilitators update charters monthly, review priorities with sponsors and teams, schedule Outlook events, manage pre-work, conduct sessions, and log action plans with KPIs.

TEAM LEADS

They collaborate monthly with facilitators on requirements and priorities, reviewing charters with team members.

ADMINS

Admins provide initial system access, enabling equal capabilities for data entry, notifications, queries, and reports.

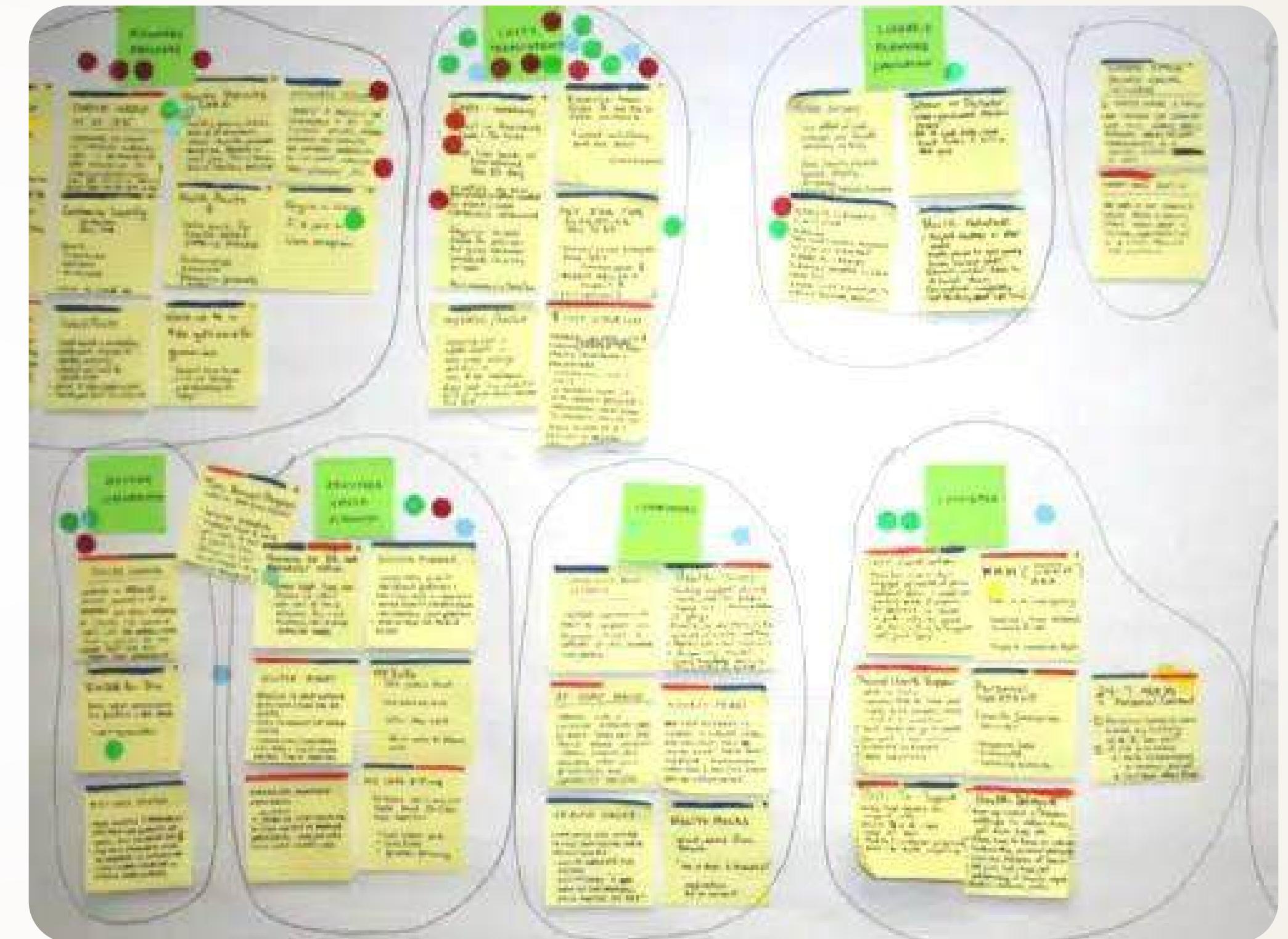
Affinity Mapping

Affinity Mapping was used to identified the following insights

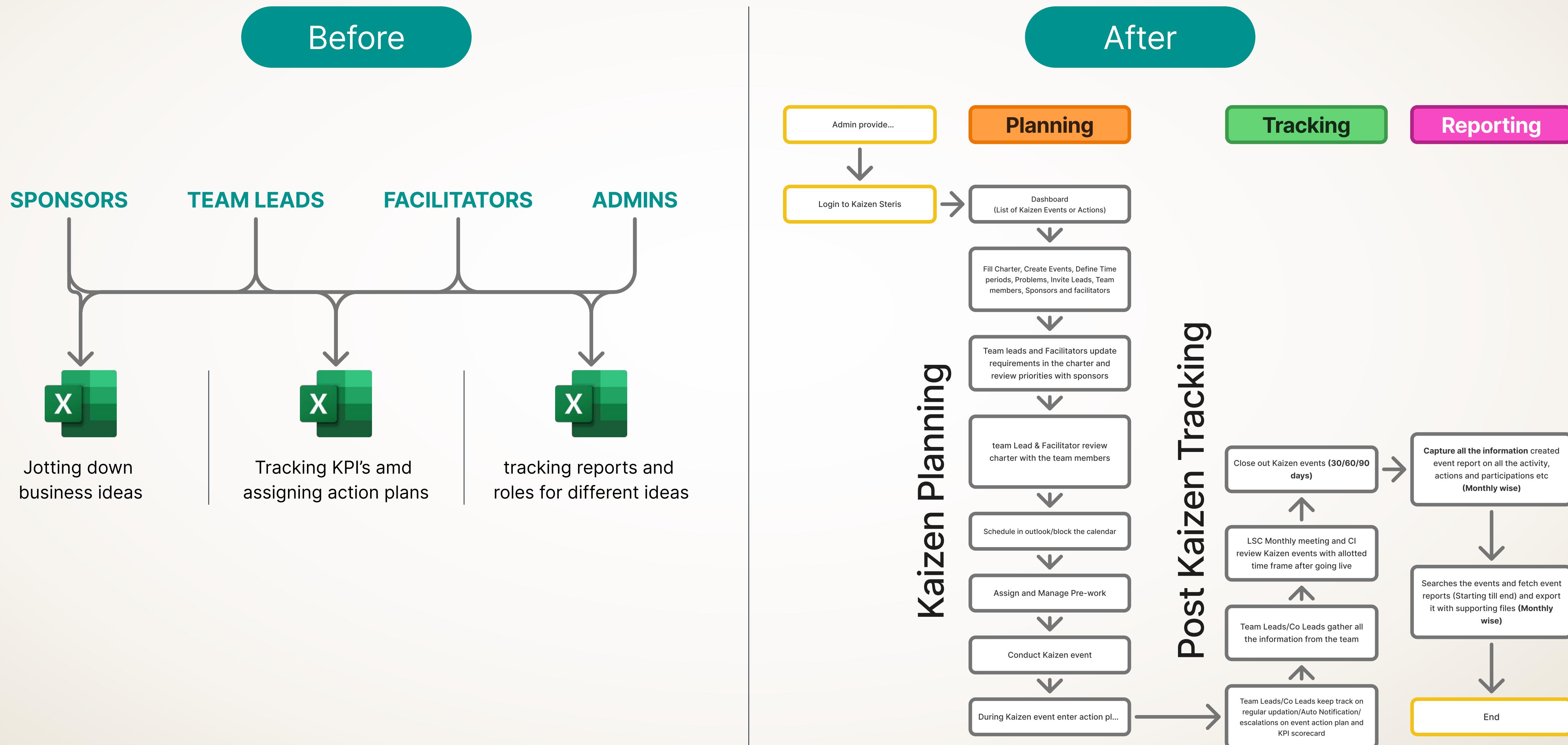
- Collected raw insights like pain points (e.g., scattered data, manual tracking) and quotes from interviews into sticky notes.
- Grouped similar items collaboratively (e.g., "notification needs" cluster, "charter updates" cluster) on a digital board like Miro.
- Label clusters to form personas (Nikki for time management, Jen for facilitation) and identify patterns driving app features.

Benefits

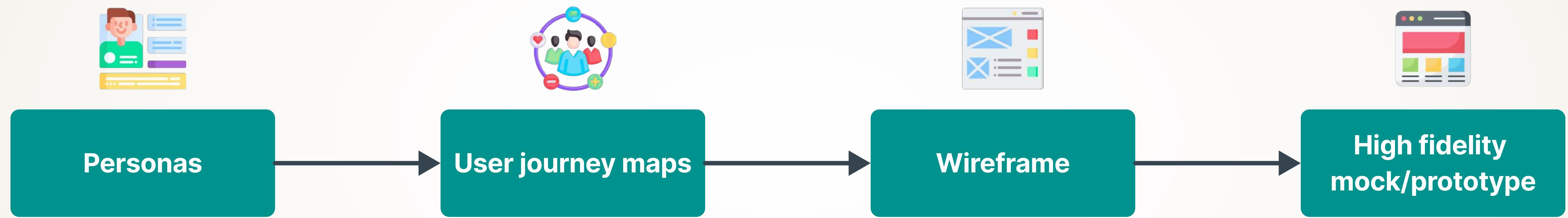
This reveals priorities like KPI tracking and escalations, informing user flows and reducing admin time waste.



User Flow - Process Mapping



Solution used



Personas

Created using data from user interviews

 Change Avatar	Job Responsibilities Oversees multiple Kaizen projects, sponsors improvements.	Biggest Challenges Difficulties tracking KPIs across events; lack of dashboards hinders decision-making and resource allocation.
Name Alex Rivera	Goals or Objectives Gain holistic views via customizable dashboards and integrations (Outlook, Teams).	Behaviors Reviews metrics weekly; values automated alerts and search/filter for efficiency.
Job Title Sponsor/Team Lead		
Age 40 to 45 years		
Organization Size 501-1000 employees		

Alex Rivera - Sponsor/Team Lead

Pain Points:

Difficulties tracking KPIs across events; lack of dashboards hinders decision-making and resource allocation.

Behaviors:

Reviews metrics weekly; values automated alerts and search/filter for efficiency.

 Change Avatar	Job Responsibilities Handles planning, progress monitoring, and reporting for Kaizen initiatives.	Biggest Challenges Admin overload from manual processes; limited visibility into improvements and coaching opportunities.
Name Jen Wisniewski	Goals or Objectives Centralize data to reduce reporting time and ensure accountability for closures.	Behaviors Relies on spreadsheets and emails; needs quick exports (Excel, PDF) for stakeholders.
Job Title Admin/Tracker		
Age 35 to 45 years		
Organization Size 501-1000 employees		

Jen Wisniewski - Admin/Tracker

Pain Points:

Admin overload from manual processes; limited visibility into improvements and coaching opportunities.

Behaviors:

Relies on spreadsheets and emails; needs quick exports (Excel, PDF) for stakeholders.

 Change Avatar	Preferred Method of Communication • Email • Phone • Face-To-face	Tools They Need to Do Their Job • CRM Software • Email • Invoicing Software • Content Management Systems
Name Nikki Csepigi	Job Responsibilities Leads Kaizen events, focuses on time management and execution.	Goals or Objectives Streamline event planning and real-time visibility into action items.
Job Title Kaizen Facilitator		
Age 45 to 54 years		
Organization Size 501-1000 employees		

Nikki Csepigi - Kaizen Facilitator

Pain Points:

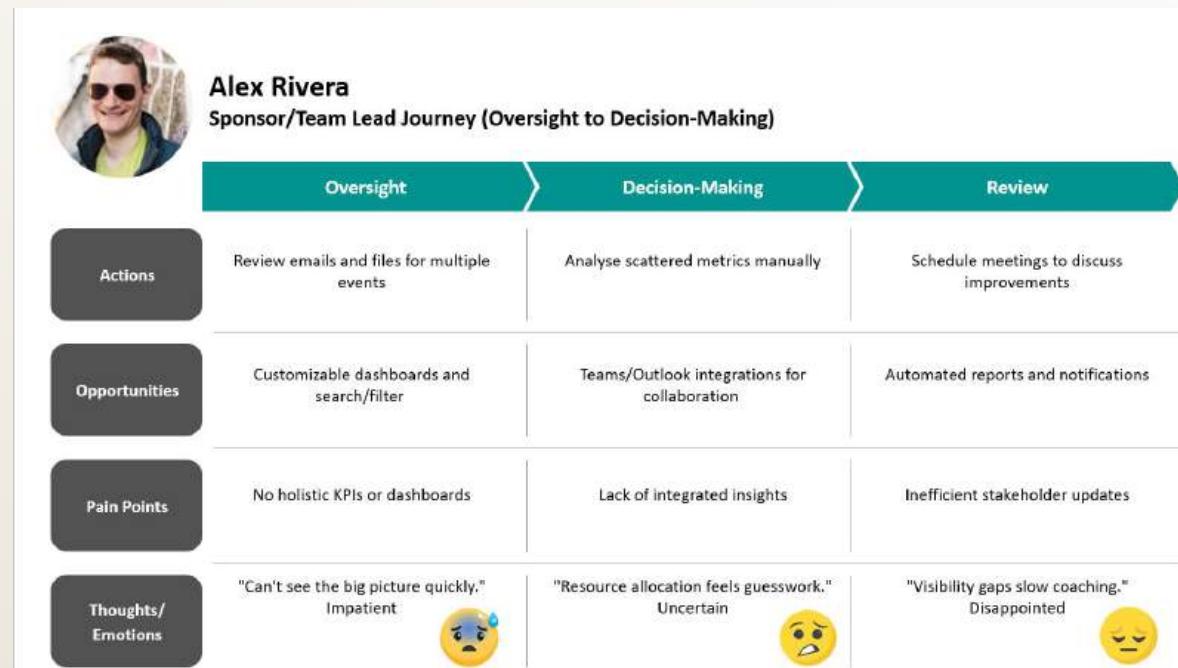
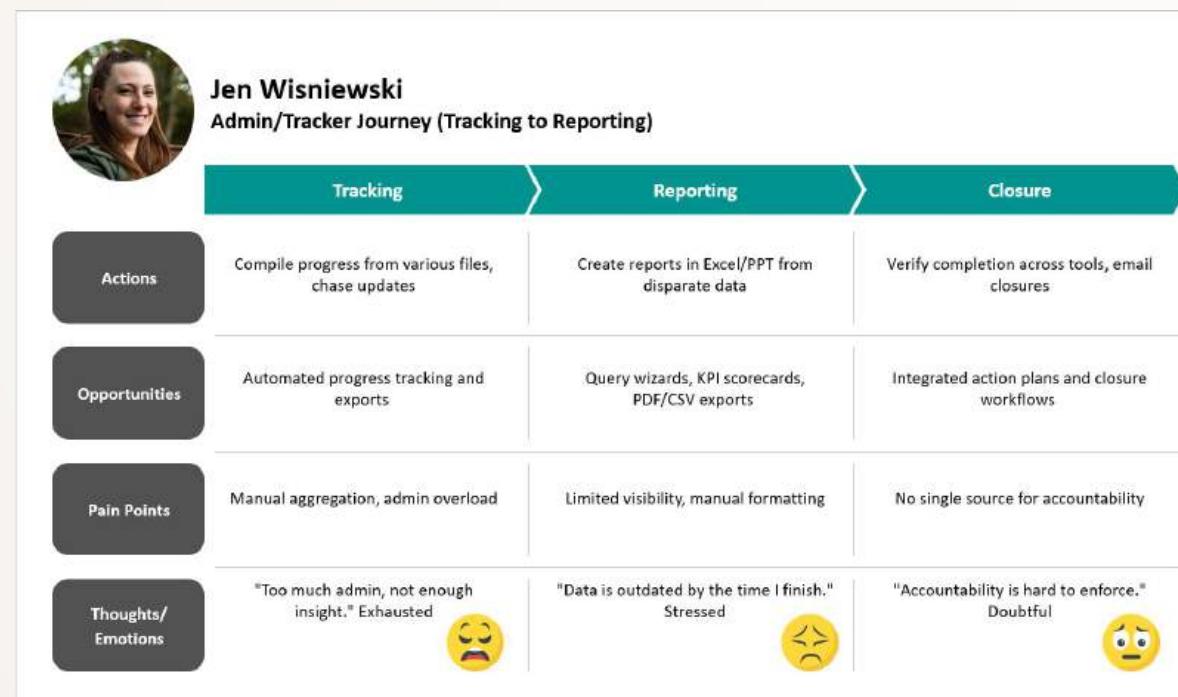
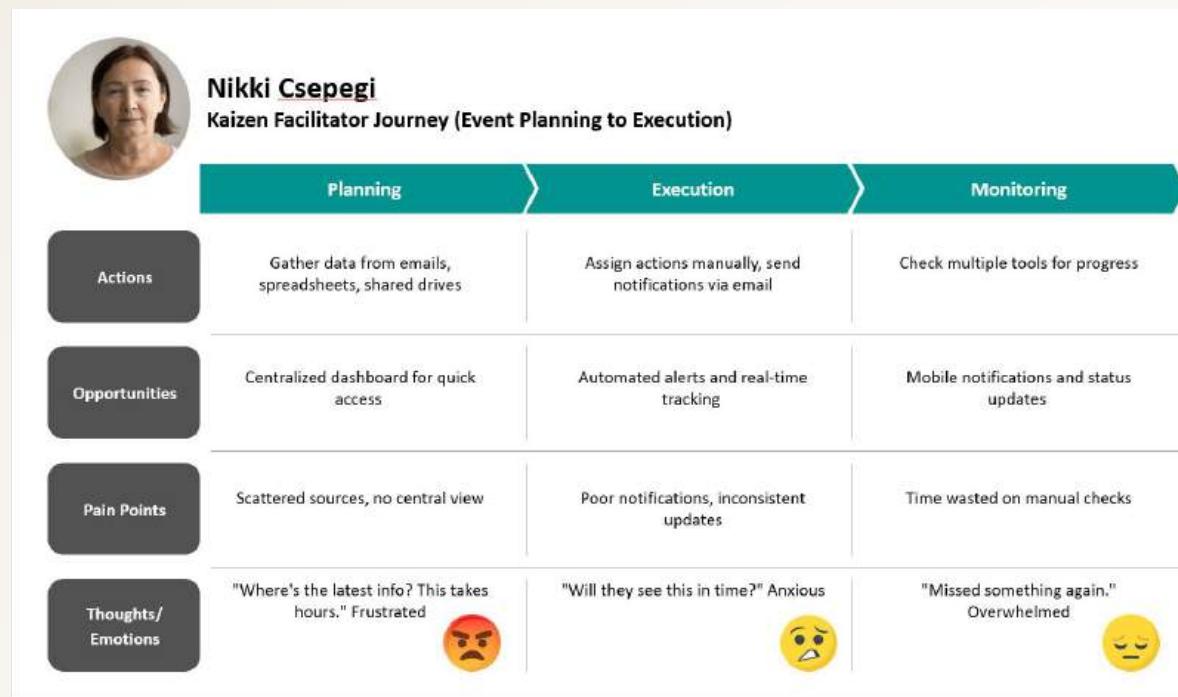
Scattered data across sources wastes time on manual tracking; poor notifications lead to missed updates and inconsistent execution.

Behaviors:

Uses multiple tools daily; prefers mobile access for on-the-go monitoring.

User Journey Maps

Created using data from user interviews/Personas



User Journey Maps for Nikki Csepigi, Jen Wisniewski, and Alex Rivera outlined activities, needs, goals, pain points, and touchpoints. These fed into maps of current (as-is) and future flows, covering steps from login and dashboard to event creation, tracking, KPIs, notifications, and reports.

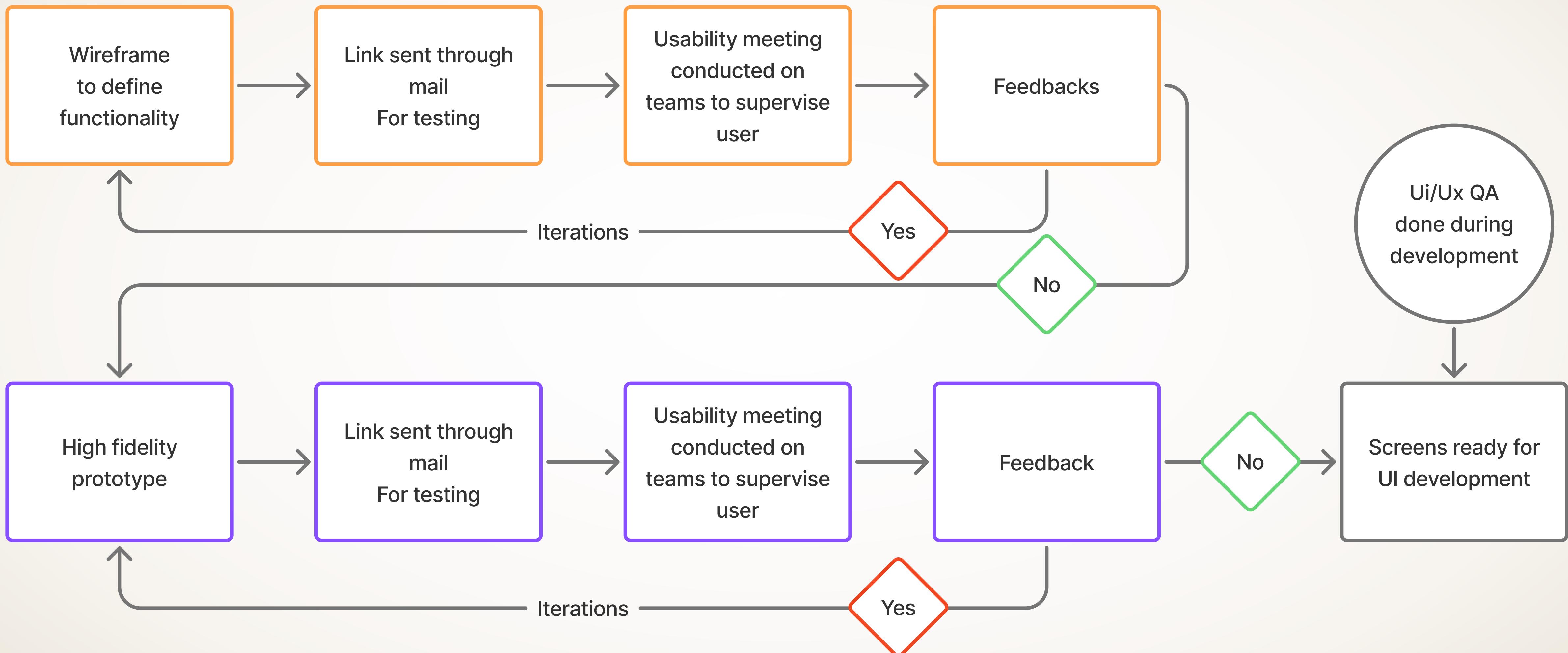
Key Insights

- Highlighted needs for intuitive charter creation and dashboard organization to manage time easily
- Faced issues with tracking, notifications, escalations, and reporting, pointing to gaps in automation and visibility.
- David Csepigi, as admin, sought quick data management to handle other requests efficiently.

Process Gaps

- As-is flows showed fragmented steps like manual admin rights assignment, Outlook invites, and inconsistent updates, leading to accountability issues
- Future flows addressed these with auto-notifications
- 30/60/90-day tracking, and centralized reports for better momentum and Lean Steering Committee review

Usability Testing Flow



Quantified Impacts (1/5)

! Problem

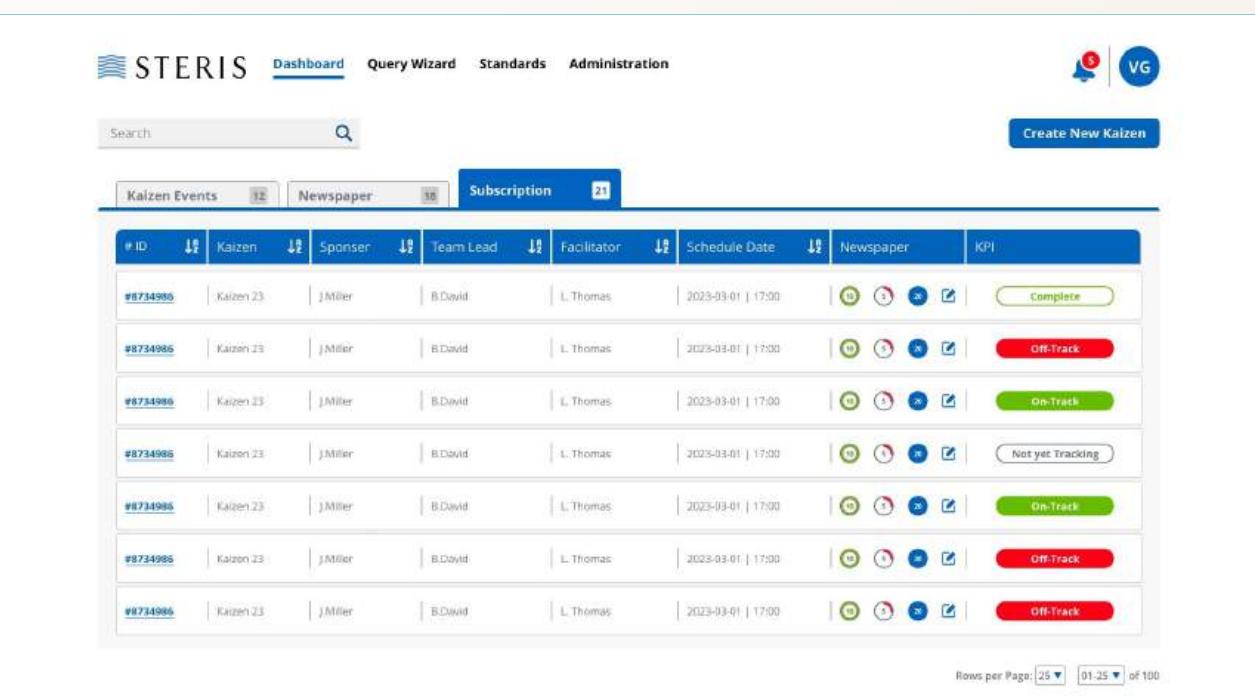
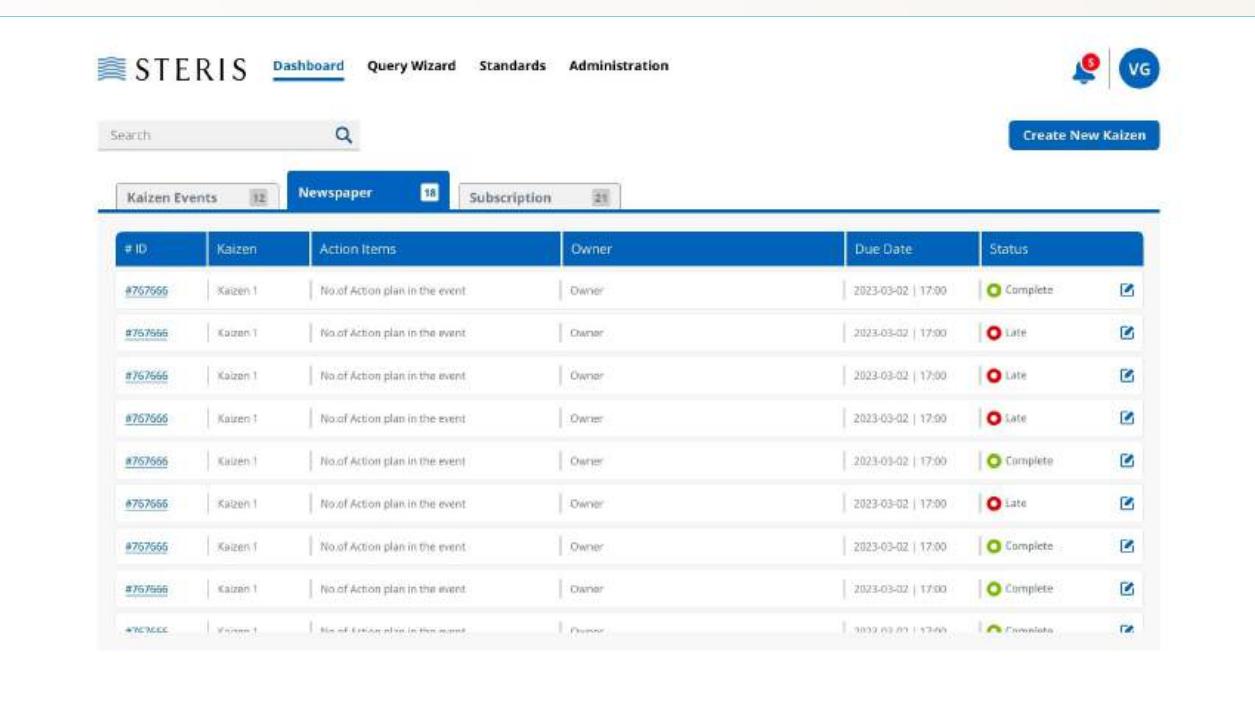
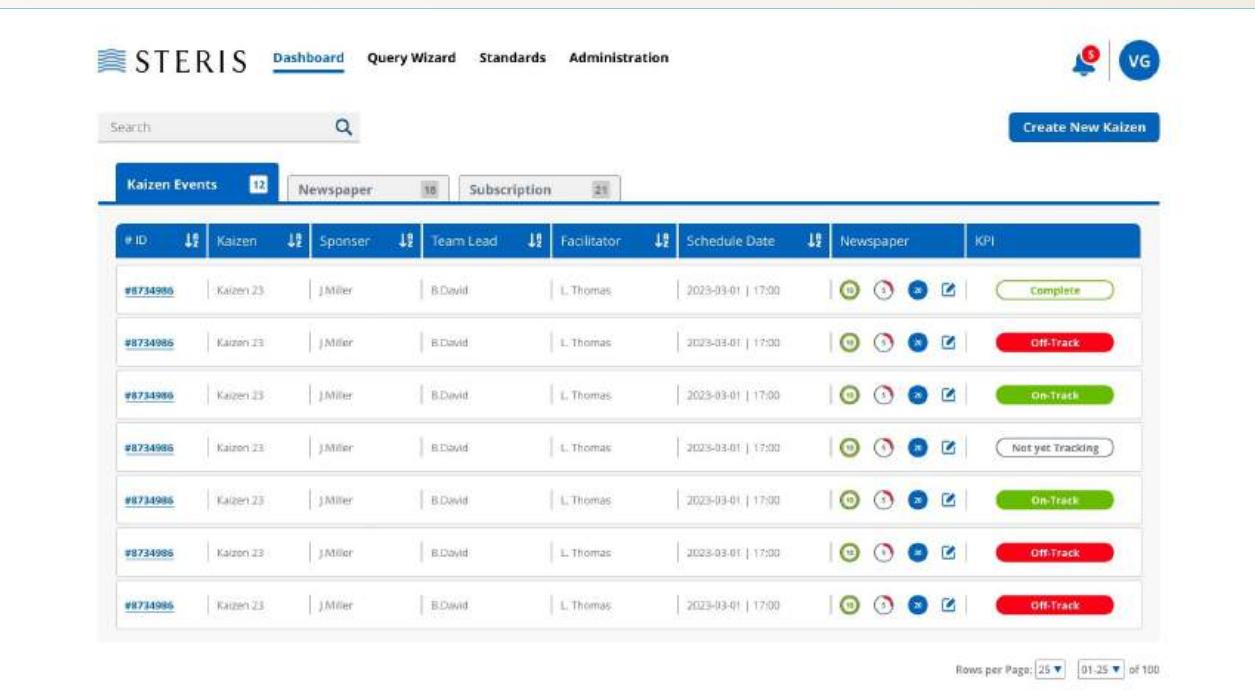
Scattered Kaizen data lacks real-time visibility, making it hard to monitor events, metrics, and progress across teams.

Solution

Customizable Lean Dashboards provide a central landing page with KPI scorecards, event lists, and filtered views for instant insights.

Impact

Boosts productivity by 40%, enhances coaching and accountability, and drives 21% higher profitability through better engagement.



Quantified Impacts (2/5)

! Problem

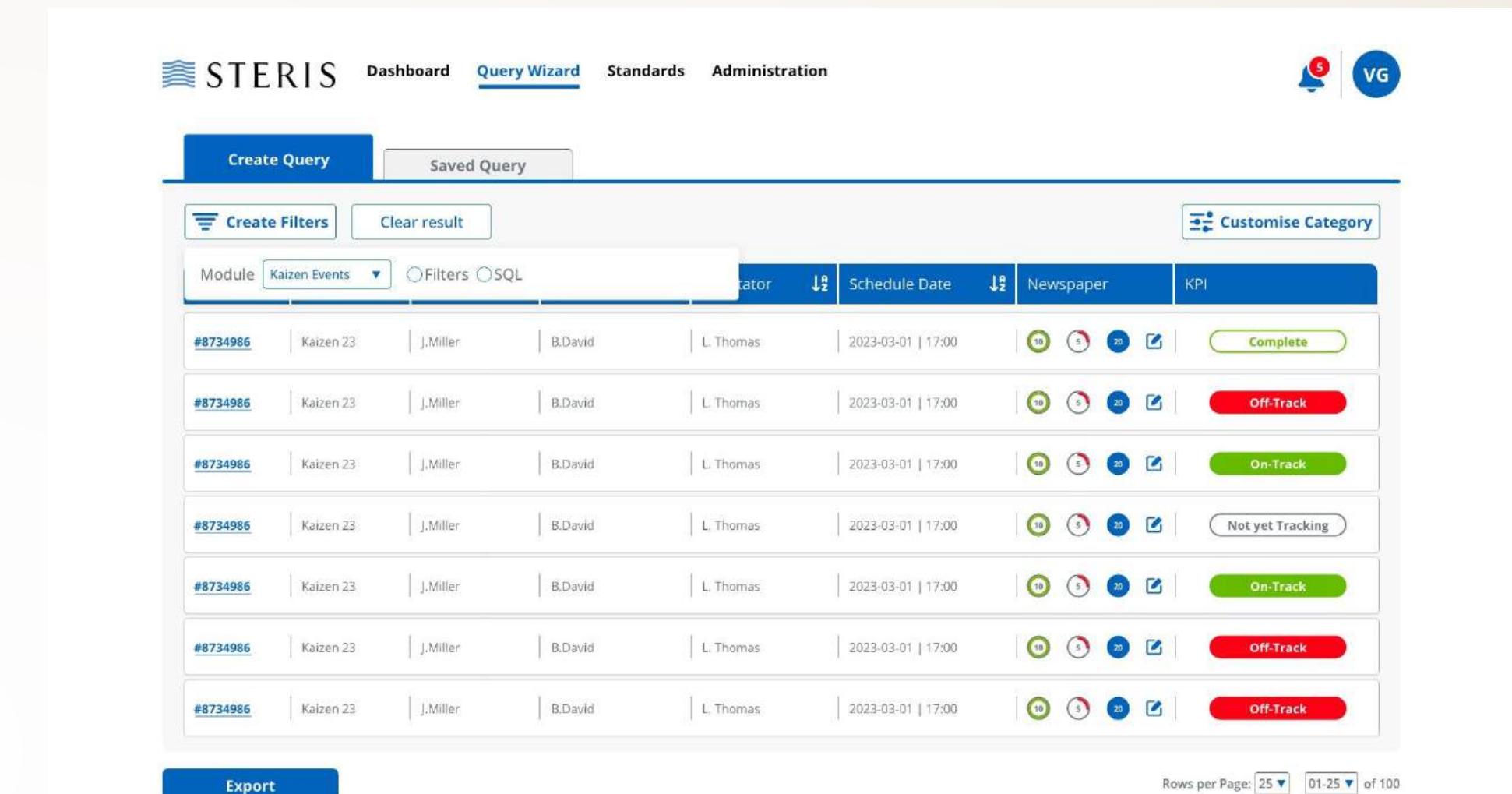
Manual report creation from scattered Kaizen data is time-consuming and error-prone, lacking customizable queries for different users.

⌚ Solution

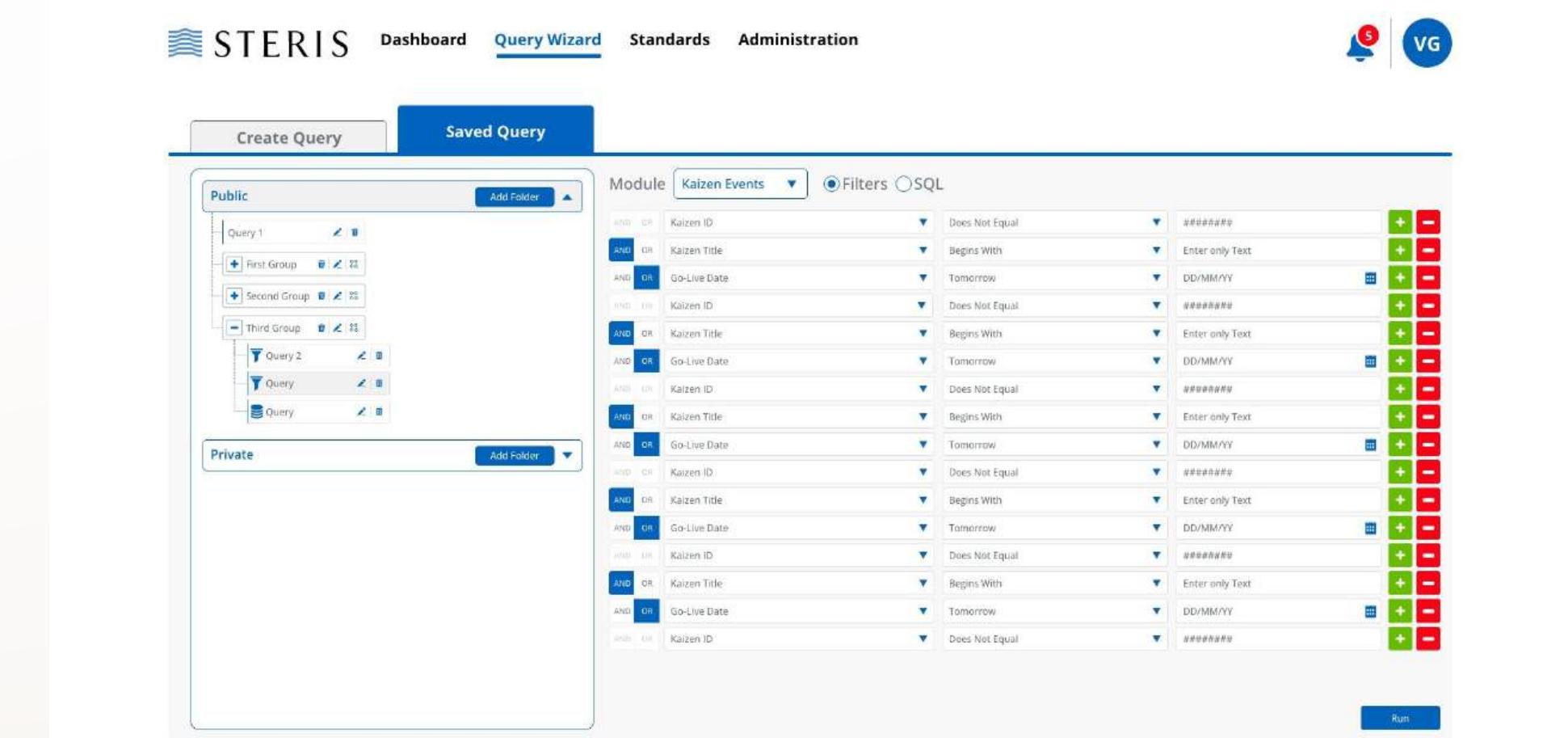
The Query Wizard offers an intuitive interface to create, edit, run, and save public/private queries with wizard-guided filtering and CSV exports.

💡 Impact

Saves 30-40% time on data retrieval, improves visibility for metrics and KPIs, and boosts productivity by enabling self-service reporting.



The screenshot shows the STERIS Query Wizard interface. The top navigation bar includes 'STERIS', 'Dashboard', 'Query Wizard' (which is active and highlighted in blue), 'Standards', and 'Administration'. The top right corner shows a user icon with a red notification dot (5) and a 'VG' monogram. The main area is titled 'Create Query' and 'Saved Query'. A 'Create Filters' button is available. The 'Module' dropdown is set to 'Kaizen Events'. The results table lists 10 rows of data, each with a unique ID (#8734986), a Kaizen ID (Kaizen 23), a Creator (J.Miller), an Operator (B.David), a Last Updated By (L.Thomas), a Date (2023-03-01), and a Time (17:00). Each row includes a set of icons for tracking and a status indicator: 'Complete' (green), 'Off-Track' (red), 'On-Track' (green), 'Not yet Tracking' (grey), 'On-Track' (green), 'Off-Track' (red), 'Off-Track' (red), and 'Off-Track' (red). A 'KPI' column is present but empty. At the bottom, there is an 'Export' button and a 'Rows per Page' dropdown set to 25, showing page 01-25 of 100.



The screenshot shows the STERIS Query Wizard interface, specifically the 'Saved Query' section. The top navigation bar is identical to the previous screenshot. The main area shows a 'Create Query' and 'Saved Query' tab, with 'Saved Query' selected. A 'Public' folder contains a query named 'Query 1' which is expanded to show 'First Group', 'Second Group', and 'Third Group'. The 'Third Group' contains a 'Query 2' which is further expanded to show 'Query' and 'Query'. To the right of the query structure, there is a detailed list of filter conditions for 'Kaizen Events'. These filters include comparisons like 'Does Not Equal', 'Begins With', and 'Enter only Text' for various fields such as 'Kaizen ID', 'Kaizen Title', 'Go-Live Date', and 'Last Updated By'. The interface uses a color-coded system with green and red markers next to each filter condition. At the bottom right is a 'Run' button.

Quantified Impacts (3/5)

! Problem

Accessing data from three separate Excel files to generate a Kaizen report proved cumbersome and hindered effective tracking of key aspects.

⌚ Solution

Steris Kaizen software's centralized form replaces three Excel files, enabling direct entry of details (ID, title, objectives, KPIs) with drag-and-drop uploads and validation.

💡 Impact

Web form usability improvements **raise completion rates by 80-90% and web accessibility by about 70%**.

Submit New Kaizen Idea

1 → 2

Daily Brief	Name	Role	Function
<input type="checkbox"/>	Steris User	Role	▼ Enter Specific Function
<input type="checkbox"/>	Steris User	Role	▼ Enter Specific Function
<input type="checkbox"/>	Non-Steris User	Role	▼ Enter Specific Function
<input type="checkbox"/>	Steris User	Role	▼ Enter Specific Function
<input type="checkbox"/>	Non-Steris User	Role	▼ Enter Specific Function
<input type="checkbox"/>	Steris User	Role	▼ Enter Specific Function
<input type="checkbox"/>	Non-Steris User	Role	▼ Enter Specific Function

Quantified Impacts (4/5)

! Problem

Manual Kaizen idea invites via scattered emails or tools lead to inconsistent team assembly, poor visibility, and delayed event planning.

⌚ Solution

Steris Kaizen form's built-in invite feature allows direct addition of team members (facilitators, sponsors, leads), with Outlook scheduling and notifications for seamless coordination.

💡 Impact

High employee engagement teams **prove 21% more profitable**, with **MS Teams collaboration increasing productivity by 40%**.

Kaizen Idea Invite

1 → 2

New Meeting Details

Attendance Required

Attendance Optional

Subject

From: 04:30 AM → To: 05:30 AM 1hr Daily Mon Tue Wed Thu Fri

Notification Timings

Location

Rooms Available

Description

Back Save

Quantified Impacts (5/5)

! Problem

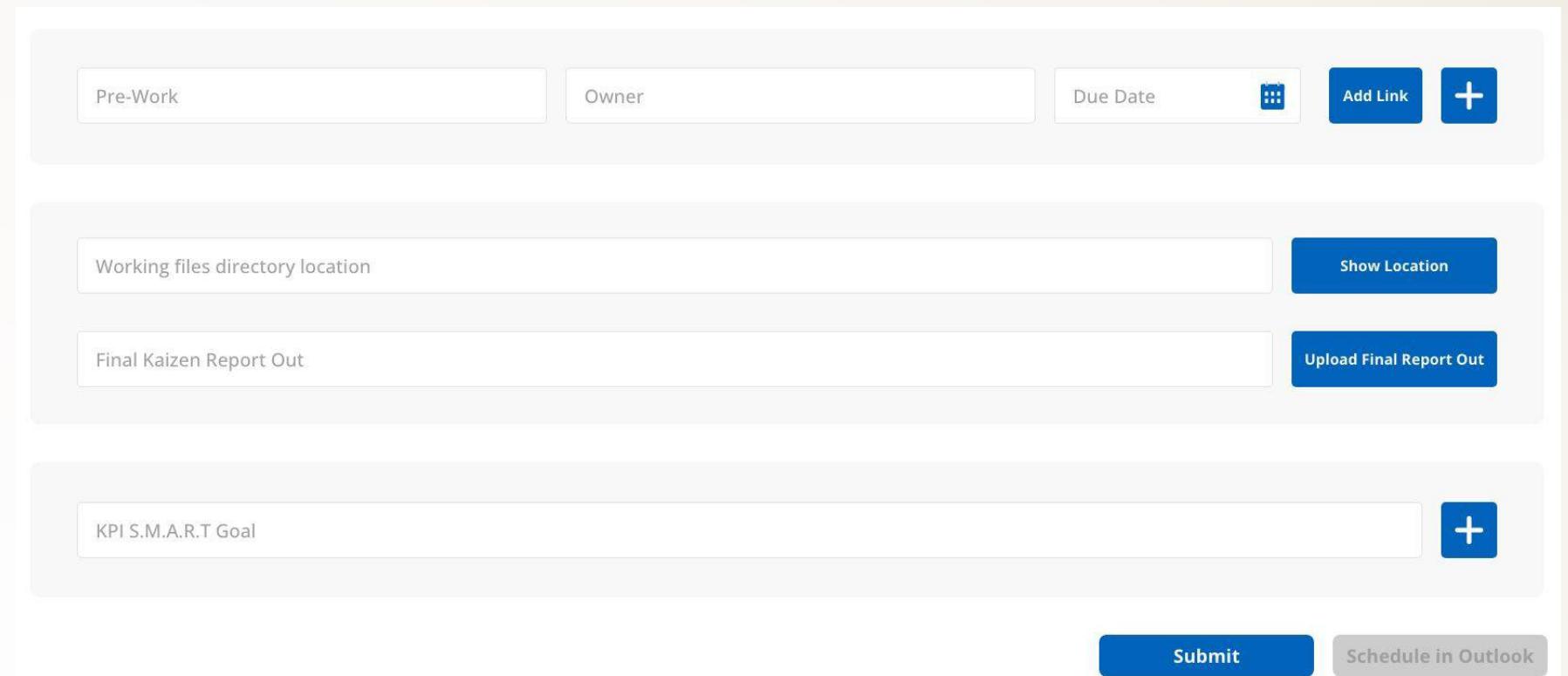
Scattered files and links across multiple sources waste 30-40% of time searching, hinder collaboration, and reduce visibility in Kaizen workflows.

⌚ Solution

Integrated file/link sharing in the Steris Kaizen form enables drag-and-drop uploads, centralized storage, and one-click access—cutting search time by 30-40% and boosting team efficiency.

💡 Impact

File/link-sharing sections **cut search time by 30-40%**.



The image shows a screenshot of the Steris Kaizen form interface. At the top, there are fields for 'Pre-Work', 'Owner', 'Due Date', and buttons for 'Add Link' and '+'. Below this, there are three sections: 'Working files directory location' with a 'Show Location' button, 'Final Kaizen Report Out' with an 'Upload Final Report Out' button, and 'KPI S.M.A.R.T Goal' with a '+'. At the bottom right are 'Submit' and 'Schedule in Outlook' buttons.

Conclusion

Key Insights

- Successfully transforms Lean practices by centralizing data
- Reduced administrative burdens
- Enabled seamless collaboration across diverse user groups

Design Challenges Overcome

- Challenges in multi-user design, such as scattered data and manual tracking, were addressed through user-friendly forms, file/link-sharing sections, and integrated communication hubs
- These strategies ensure intuitive navigation and optimal experiences for facilitators, admins, and teams.

Proven Results

High engagement drives 21% greater profitability

Accessibility increased by 20%

Search efficiency increased by 30-40%

Productivity via MS Teams increased by 40%

Usability enhancements boost form completion by 25-90%

Thank You

“Lets connect and collaborate”



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My Learnings

User-Centered Process

Feature Prioritization

Impact Measurement