



# KaiNexus Year in Review & Product Roadmap

**KaiNexus**



**Ryan Rippey**  
Director of Product



**Kade Jansson**  
Product Manager



**Noah Paratore**  
Product Manager

# Meet the Presenters



RYAN **RIPPEY**



KADE **JANSSON**



NOAH **PARATORE**

# 2024 - By the Numbers

**6 Releases**

**243 Enhancements**

# Code Commanders

Development  
Product  
Testing

# 2024

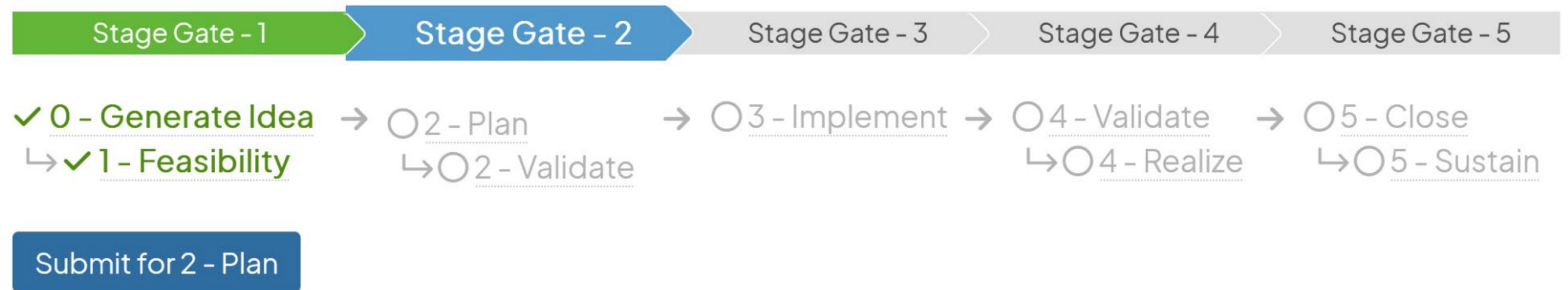
## Year in Review

# 2024

## Stage Gates

# Stage Gates

## Stage Gates



# Milestone Reporting

# Milestone Reporting

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

## Cycle Time by Milestone

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

# 2024

## Custom Statuses

# Custom Statuses

IN PROGRESS ▼

CLOSED ▼

AWAITING SIGN-OFF ▼

OFF TRACK ▼

PENDING ▼

OPEN ▼

DONE ▼

ON TRACK ▼

RESOLVED ▼

CANCELLED ▼

The screenshot shows a project tracking interface for 'Historical Data Tracking #861'. At the top, there are buttons for 'Reports', '+ Add', and 'Actions'. Below the title, a status dropdown menu is open, showing 'ACTIVE: ON TRACK' with a green background and a downward arrow. A green line connects this dropdown to a larger, magnified version of the 'ACTIVE: ON TRACK' dropdown in the center of the page. The main content area includes tabs for 'Details', 'Resolution', 'Comments', 'Timeline', and 'Other'. Under 'Details', there is a 'Milestones' section with a progress bar showing 'L1' (completed), 'L2' (in progress), and 'L3' (pending). Below the milestones, there are steps: 'Ideation' (with a sub-step 'Leadership Sign-off'), 'Implement', and 'Validation'. A 'Submit for Ideation' button is present. At the bottom, there is a 'Strategic Initiative' section with radio buttons for 'Quality', 'Mission and Culture', 'Safety', and 'Finance'.

# Smart Templates & Workflow Automation

# Field, Attribute & Due Date Syncing

## (4) Prioritization

Title

Priority

▼  Make KaiNexicon 2024 the best one yet!

↓ Low

 Invite amazing people

↑ High

 Show off amazing features

→ Medium

 Host in an amazing city

↓ Low

# Conditional Attribute Values

## Create A3

Theme:

Greetings KaiNexiconians! 

Strategic Initiative:

Optional

Category:

Optional

Background:

What details can you provide about this issue?

**Create** Save as Draft Cancel  

# Conditional Panels

## Reducing Patient Backlog

#5941

NEW

Reports Add Actions

Remind Print/Save PDF

A3 8D Capacity Resolution Fishbone Comments Tasks Charts Timeline Other

### Details

Strategic Initiative	Priority
Quality	High
Category	Toolbox
Healthcare	None
PDCA?	
No	

# Conditional Tabs

## Reducing Time to Close Improvement Items #7379

NEW   

Project Details Resolution Comments Nested Items Timeline Other

### Problem Statement

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

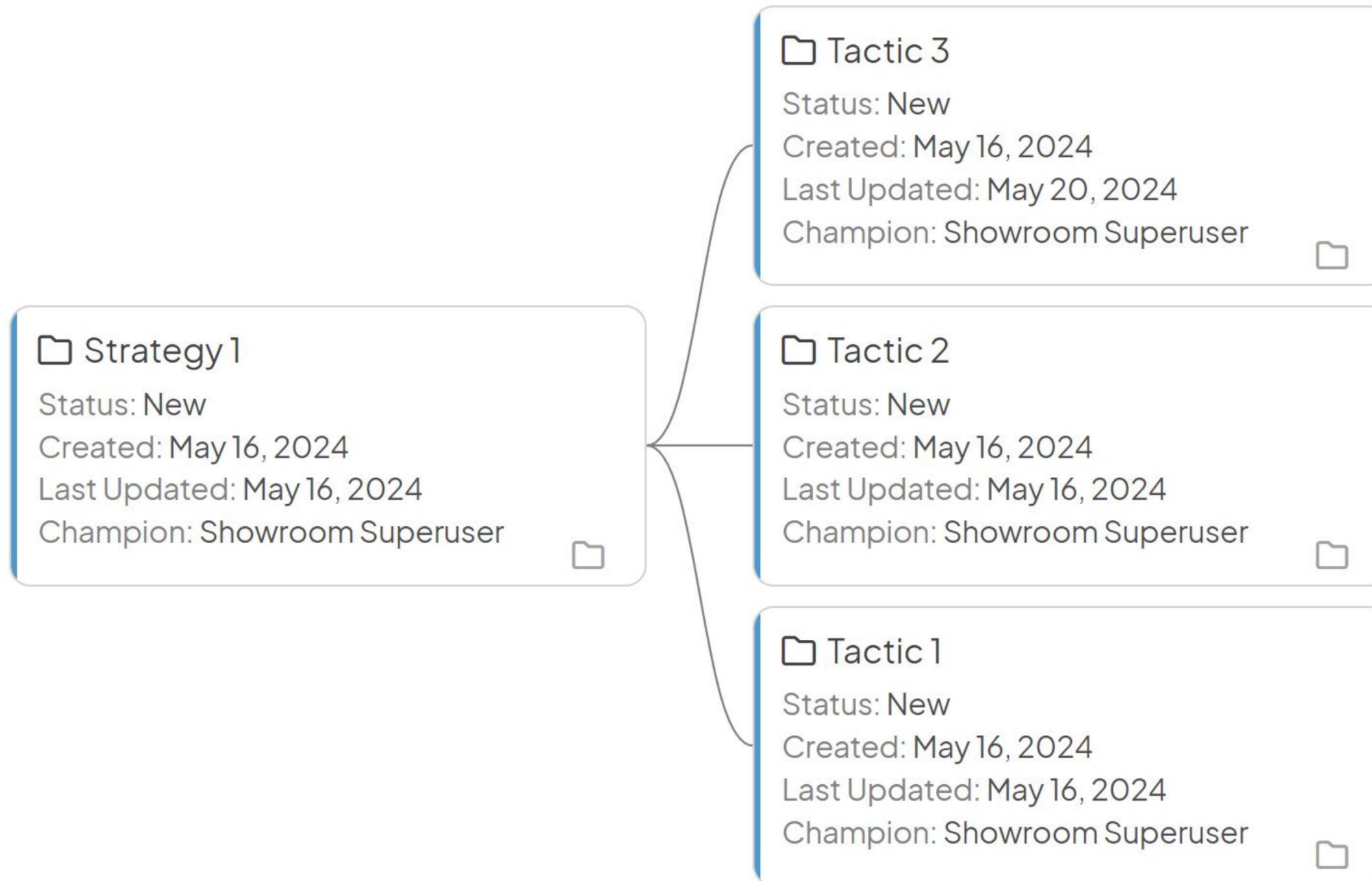
DMAIC Phase  
*None*

Category  
↻ Regulatory Compliance

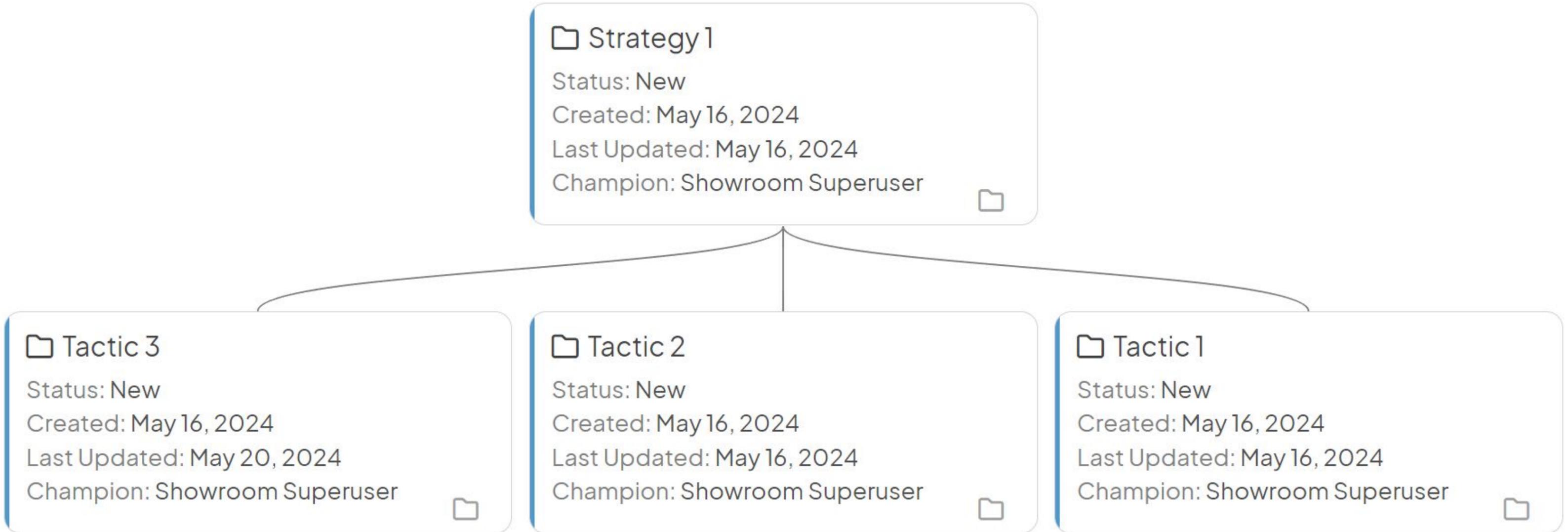
# 2024

## Hierarchy View

# Hierarchy View



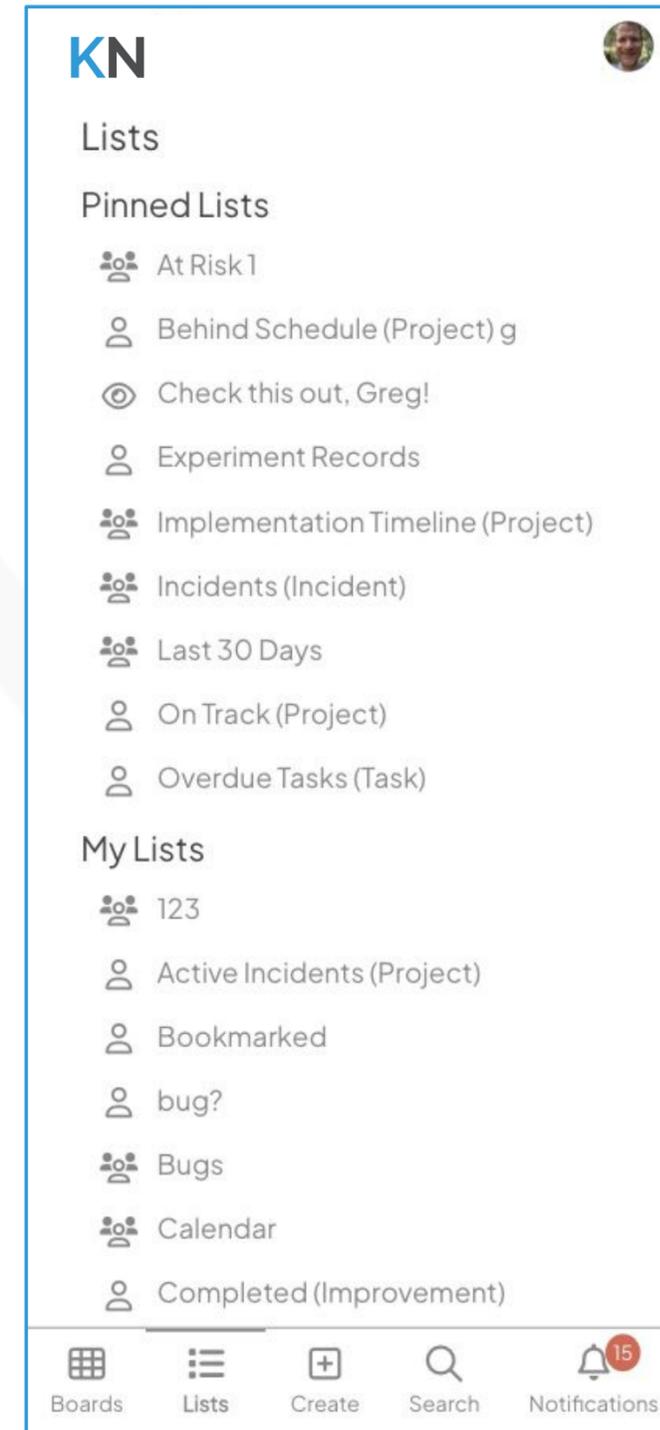
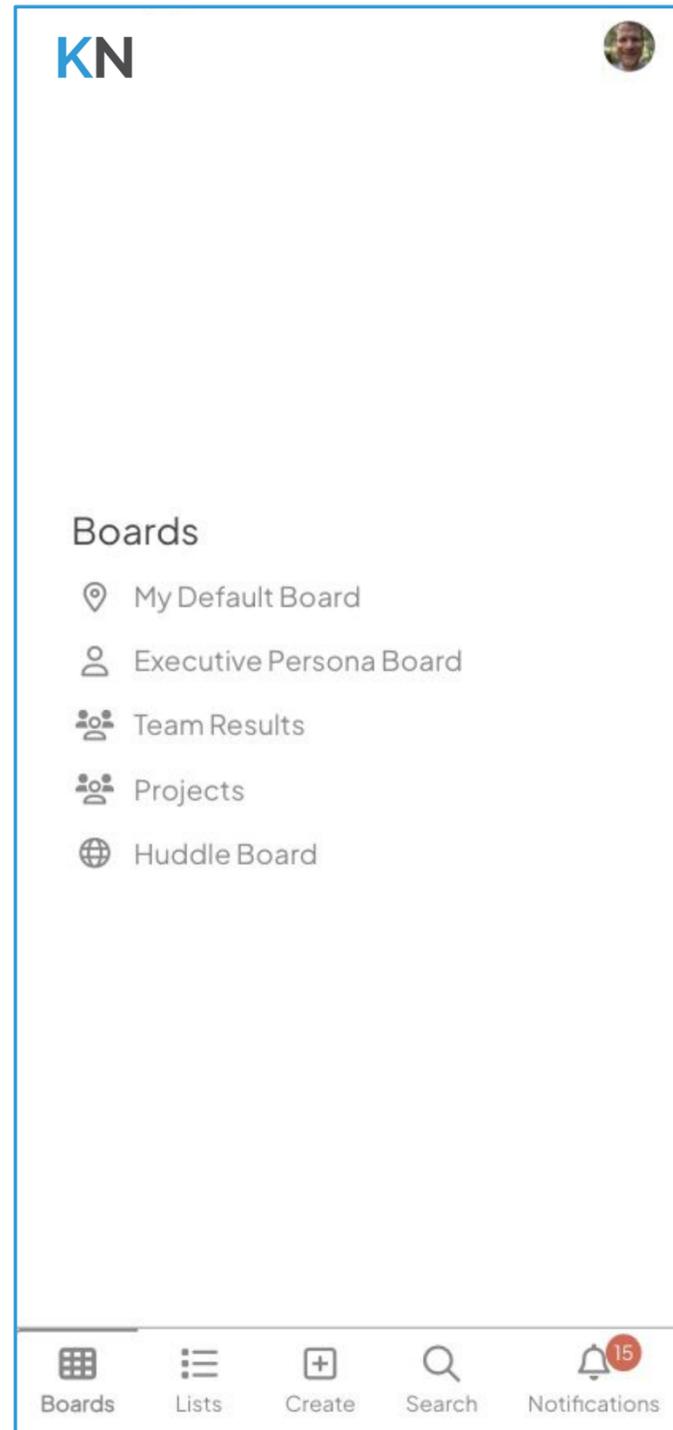
# Hierarchy View



# 2024

## Mobile

# Mobile Enhancements



# Mobile Enhancements

Reduce Paper Usage #128

NEW

- Item
- Link
- Standard Work
- Scores

All Resolution Images Comments

Charts Timeline

### Details of Project

**Purpose**  
Supplies & Waste

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

**Category**  
Improve Morale, IT

**Strategic Initiative**  
Quality

**Project Phase**  
None

**Priority**  
Low

Originating Location(s) Responsible Location(s)

Greg Jacobson

25

View Activity View Badges

Username: greg

User Type: General

Persona: Executive

Network Location: KaiNexus Corporation, Team A

Language: English

Roles: Assign, ISuperuser

Group: All

### Create Amazing Project

Name: Reduce Inpatient Time

Description: Optional

Category: Optional

Strategic Initiative: Optional

Parent: Optional

Make Private

**Status & Team**

New Planned Active Deferred

Sponsor(s): Optional

Facilitator(s): Greg Jacobson (Myself)

Sidekick(s): Required

# KaiNexus Mobile

Get Started and Download the App Today!



Apple App Store



Google Play Store

# 2024 Monthly Summary Email

# Monthly Summary Email

## KaiNexus

### Monthly Summary

#### Activity

Items Submitted

100

▲ 1.00%

Items Completed

40

▲ 7.14%

#### Engagement

Users Logged In

50

▲ 71.64%

#### Impact

Financial Impact

\$12,985

▲ 2.94%

Time Saved

60h

▼ 8.75%

[VIEW MORE](#)

# 2024

## Private Fields

# Private Fields

## Private Fields

Top Secret - Burn after Reading

 Private - Click to reveal

# 2024

## Team Roles

# Team Roles

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

# 2024

## Cycle Time

# Status History

## Status History



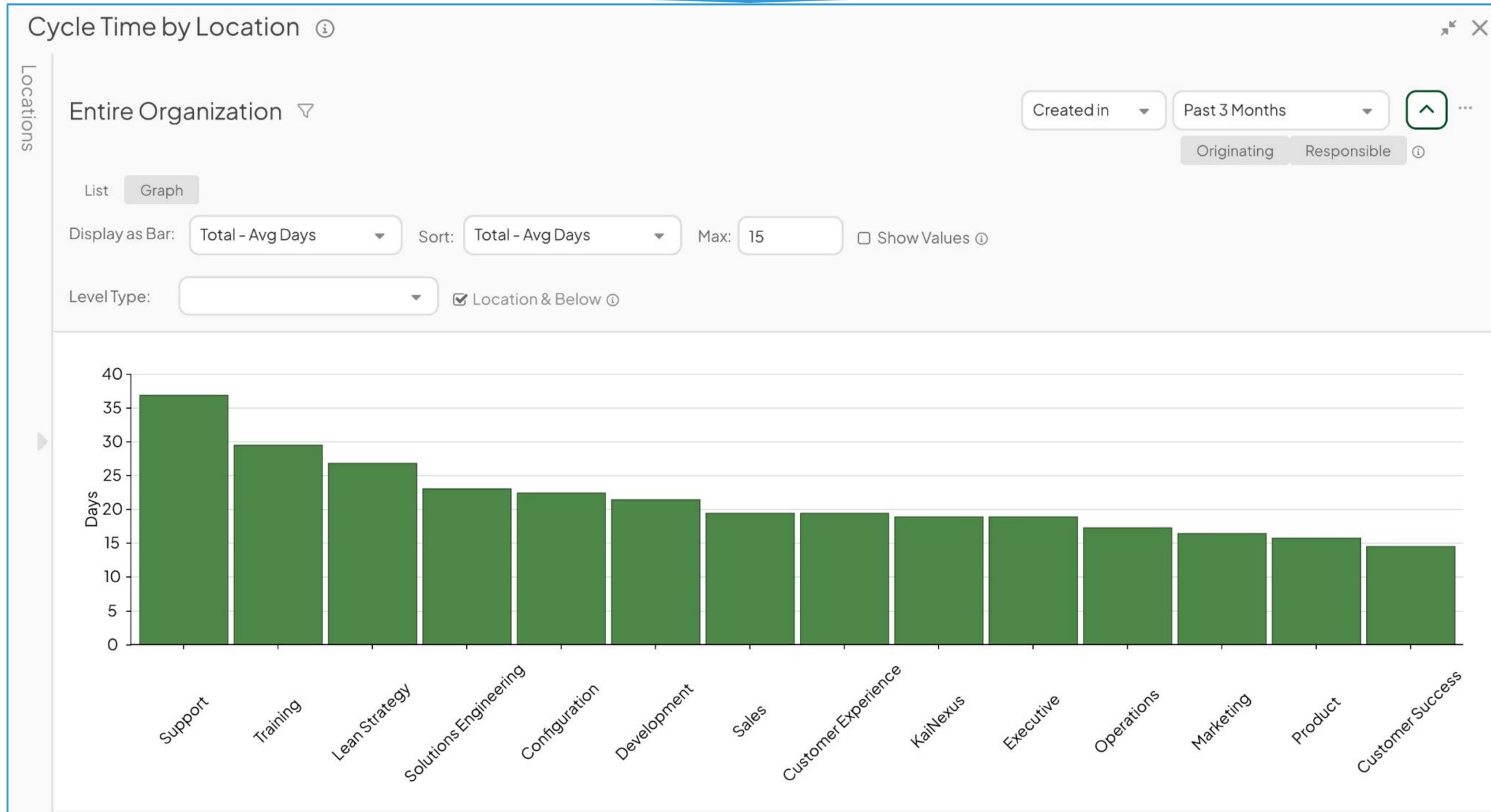
Status	Start Date	End Date
New	Mar 27, 2024 3:18 PM	Apr 10, 2024 1:58 PM
Planned	Apr 10, 2024 1:58 PM	Jan 01, 2025 12:00 AM
Active	Jan 01, 2025 12:00 AM	Feb 20, 2025 12:00 AM
Resolution Submitted	Feb 20, 2025 12:01 AM	Feb 21, 2025 12:00 AM
Complete	Feb 23, 2025 12:00 AM	

+ Add Status

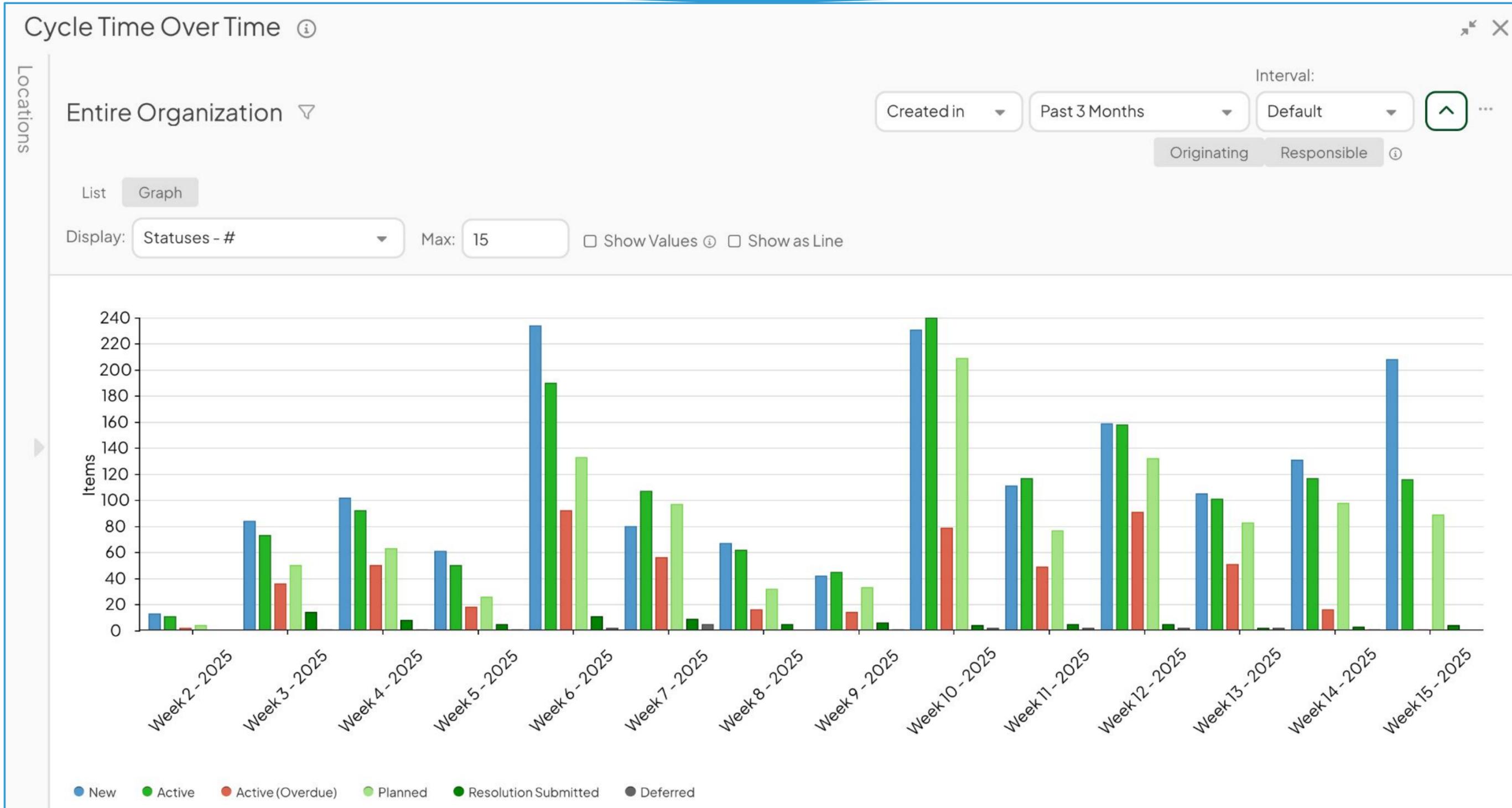
Save

Cancel

# Cycle Time Reporting



# Cycle Time Reporting



# 2024

## 2024 Recap

## 2024 Recap

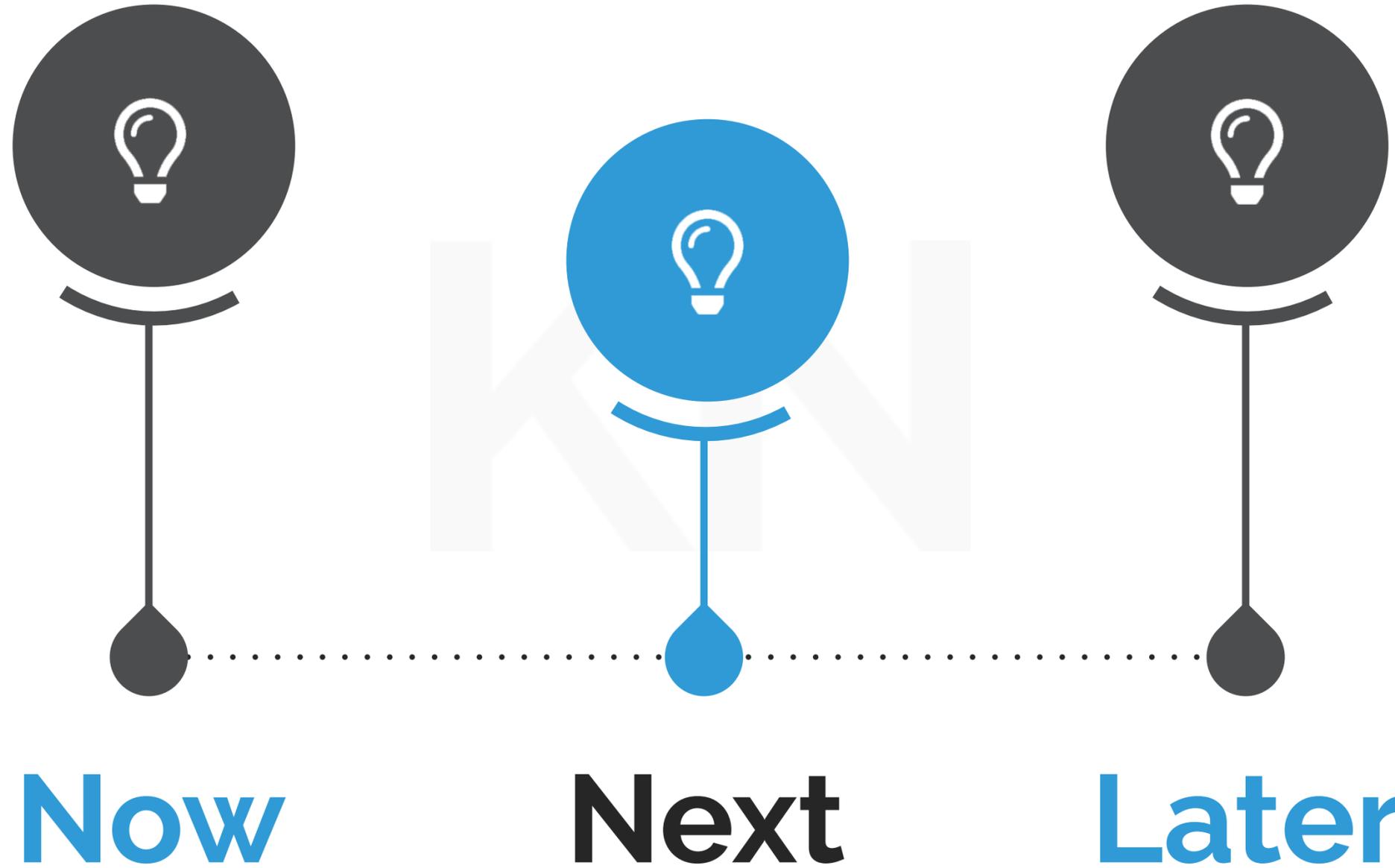
- Private Fields
- Custom Statuses
- Smart Templates & Workflow Automation
- Team Role Refractor
- Cycle Time Refractor
- Stage Gates & Milestone Reporting
- Hierarchy View
- Mobile
- Monthly Summary Email

And over **200** more enhancements!



# Product Roadmap

# Agenda





# Now

Now

v 3.2.5

# Now: Habit Score

## Habit Routine ✕

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

Select All (Recommended)

Sign In ⓘ

Use System ⓘ

Clear a Notification ⓘ

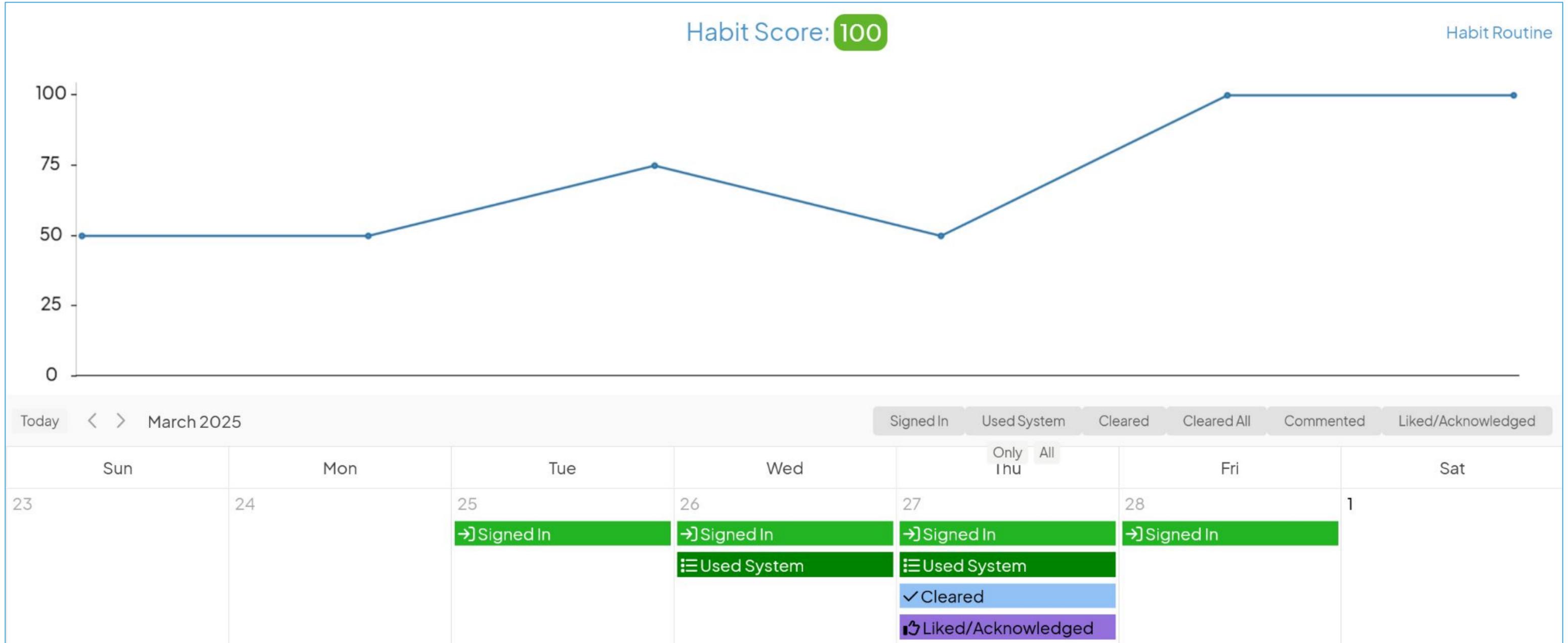
Comment on, Like, or Acknowledge an Item ⓘ

Send me a weekly email with my latest Habit Score

Save

Cancel

# Now: Habit Score



# Now: Habit Score



## Habit Score Widget

Ofie's Habit Score

100

# Now: New Badge Features

## Ofie Ofierson



Username: ofie      [Actions](#)

User Type: General

Network Location: KaiNexus Corporation

Language: English

Roles: ■ Superuser

Group: All



[View Badges](#)

[Award Badge](#)

[View Activity](#)

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



# Next

Next

v 3.2.6

# Next: Engagement from a List

## (4) My Projects

💡 Hazardous materials process

💬 👍 ✅ Status: New Created: sep 10, 2024

Last Updated: abr 08, 2025 Author: Brett Johnson

💡 Information not transferred

💬 👍 ✅ Status: New Created: oct 28, 2024

Last Updated: nov 12, 2024 Author: Hector Sanchez

💡 Recommend 3Ds

💬 👍 ✅ Status: New Created: oct 31, 2024

Last Updated: nov 23, 2024 Author: Blake Wheeler

💡 Room not getting cleaned

💬 👍 ✅ Status: Planned Due: nov 03, 2024

Last Updated: nov 24, 2024 Author: Blake Wheeler

## (4) My Projects

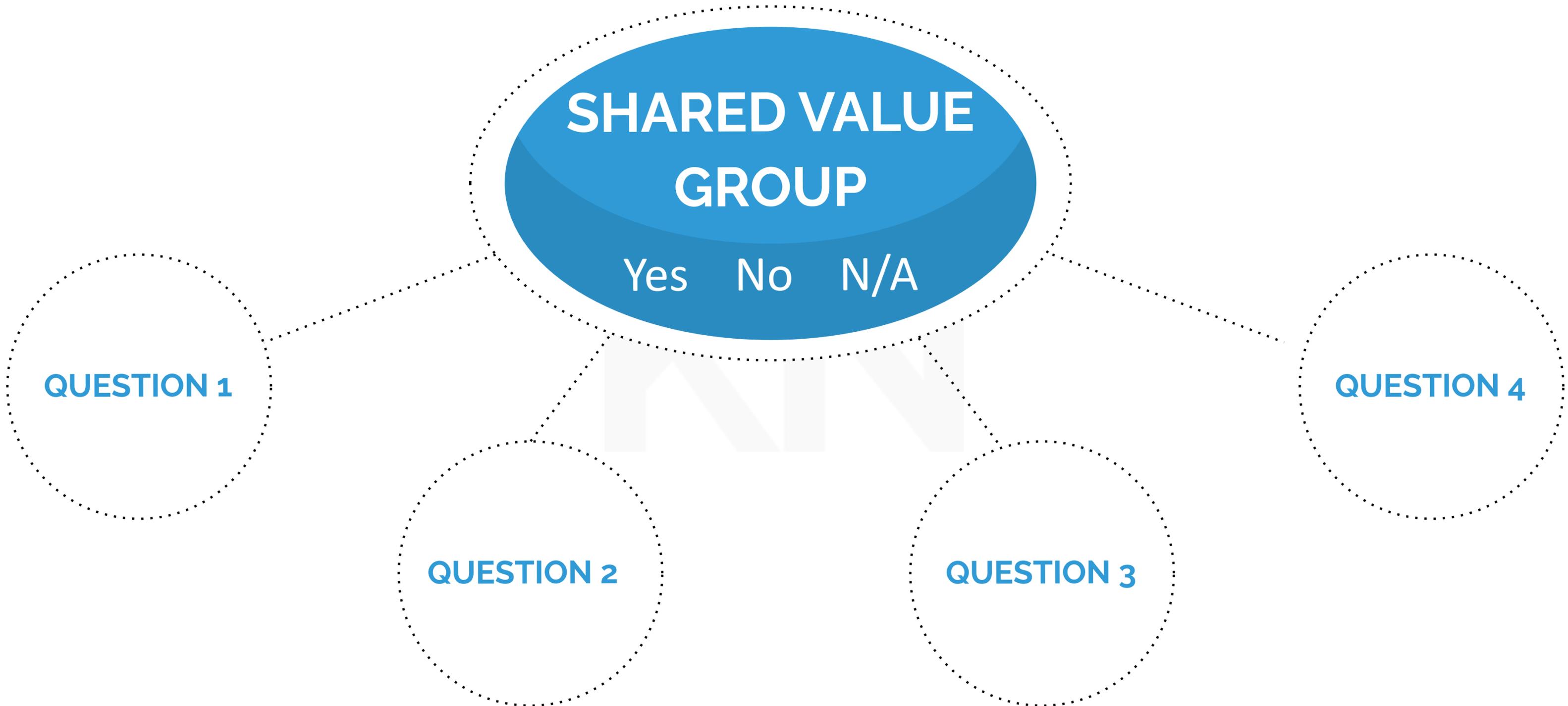
Title	Engagement	State	Key People
💡 Hazardous materials process	💬 👍 ✅	● On Track	Author: Brett Johnson
💡 Information not transferred	💬 👍 ✅	● On Track	Author: Hector Sanchez
💡 Recommend 3Ds	💬 👍 ✅	● On Track	Author: Blake Wheeler
💡 Room not getting cleaned	💬 👍 ✅	● On Track	Author: Blake Wheeler

## Next: File & Link Enhancements

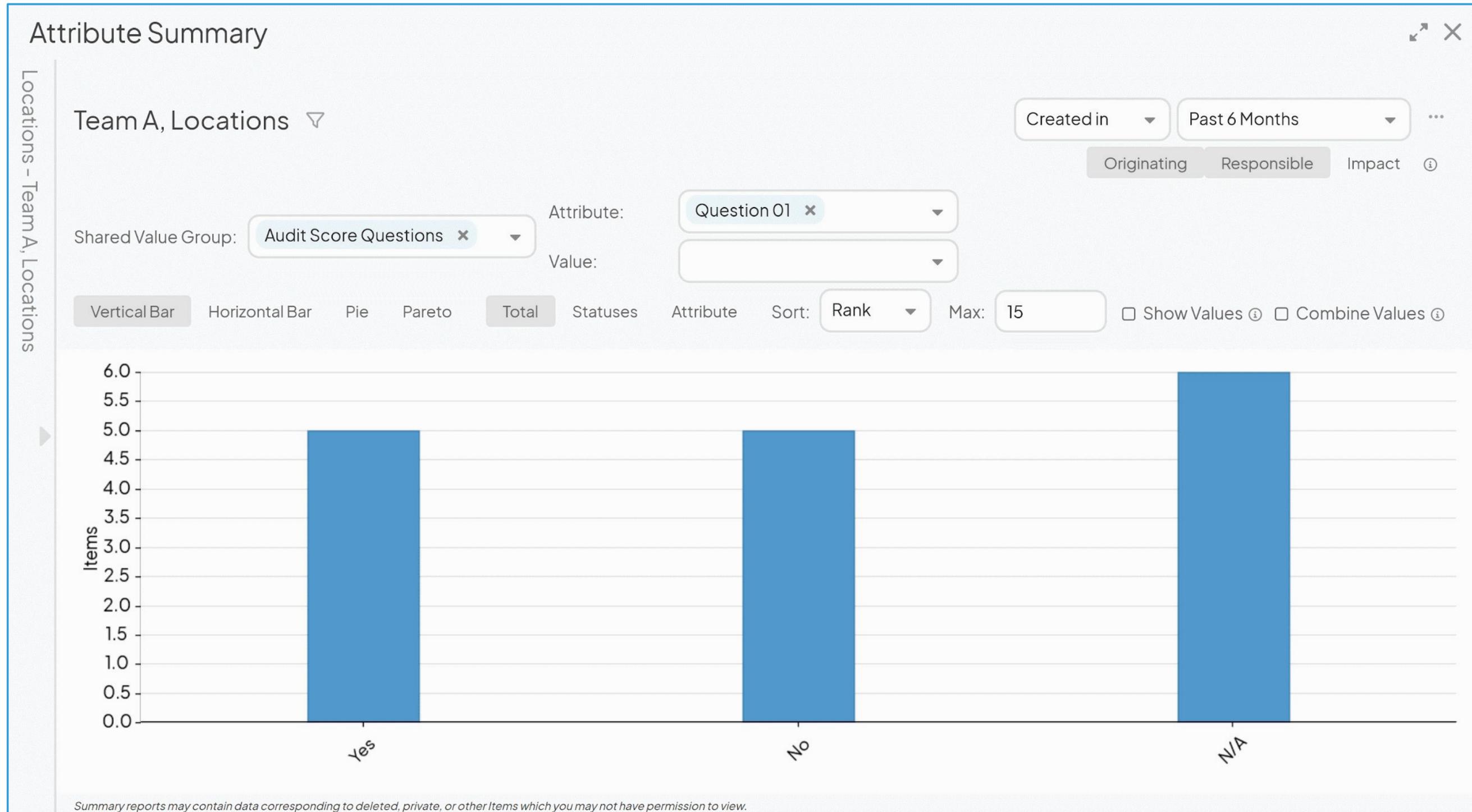
- **New Files and Links list columns**
- **Increase file attachment size to 50 MB**

(1) My Projects		
Title	Files	Links
💡 Hazardous materials process	<ul style="list-style-type: none"><li>📄 Presentation.pdf</li><li>📄 Research Data.xlsx</li></ul>	<ul style="list-style-type: none"><li>🔗 Search Results</li><li>💡 Room not getting cleaned</li></ul>

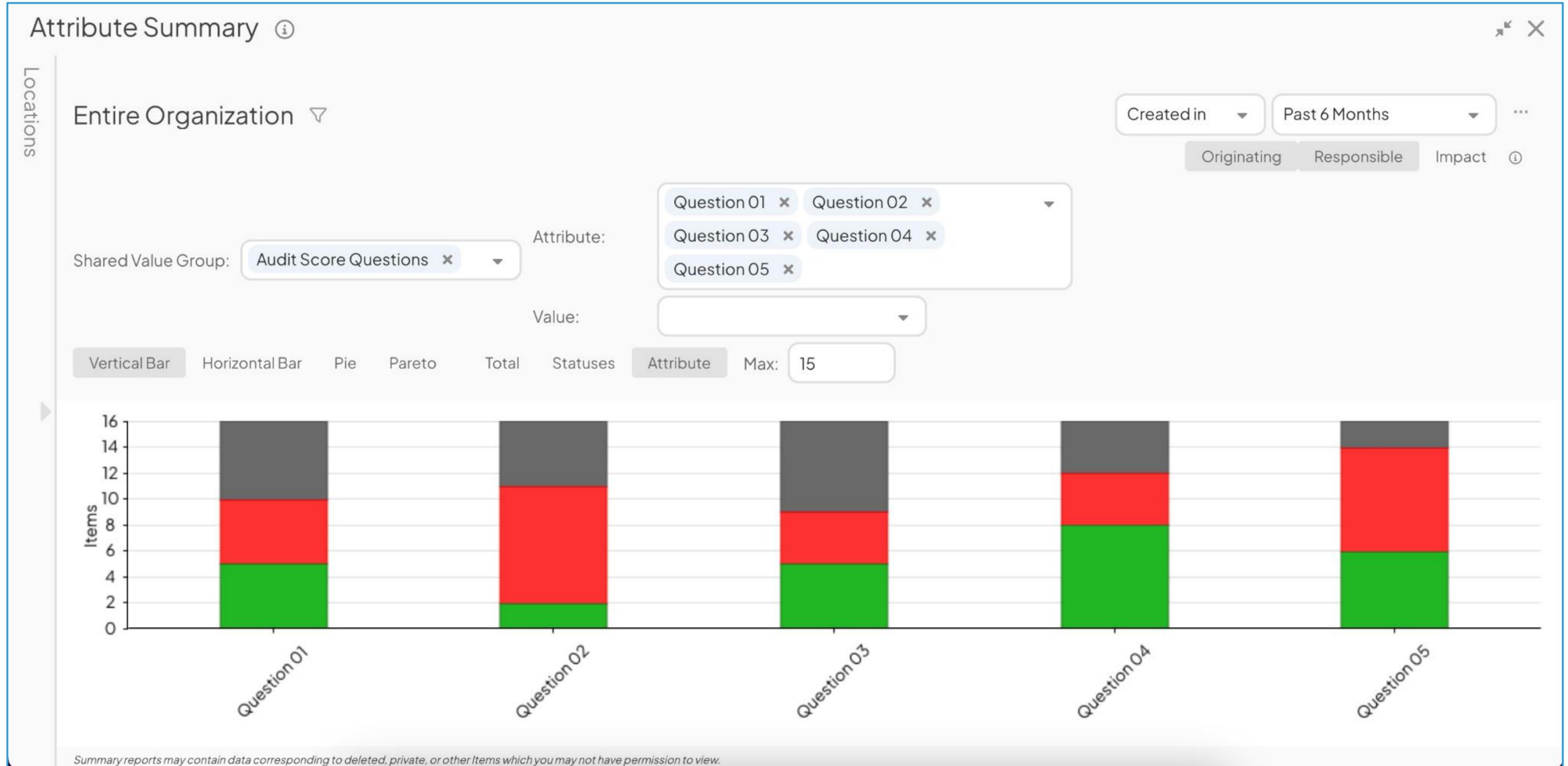
# Shared Values



# Attribute Report Enhancements



# Attribute Summary Enhancements



# Next: Milestone Location Activation

## Hazardous materials process #193

NEW ▾



Improvement

Resolution

Comments

Tasks

Timeline

Other

### Locations

Originating Location(s)

Executive

Responsible Location(s)

Corporate

### Milestones

*No Milestones have been added.*

# Next: Starred Locations

Search Locations... 

Level Type 

Location & Below  

- ★ Starred
  - Austin 
  - Dallas 
  - Seattle 
-  KaiNexus Corporation
  -  Corporate
    -  Accounting
    -  Customer Experience
    -  Development
    -  Executive
    -  Human Resources
    -  Marketing
    -  Product Management

Originating Location(s): 

Austin  

Start typing to search...

**My Locations**

- Austin 

**Starred Locations**

-  Executive 
-  Corporate 
-  KaiNexus Corporation 

**Recent Locations**

- Dallas
-  Production
-  Product Management
-  AM Shift



# Later



# Capacity Planning

# Capacity Planning

### Greg Jacobson



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

Group: All

Actions

- Edit Profile
- Change Password
- Capacity Settings
- Change Profile Picture

### Edit Team

Enable Capacity Tracking

Author(s):  
Kade Jansson

Responsible: ⓘ  
Start typing to search...

Current Commitment: 2 Hours per Week  
Current Capacity: [Progress Bar]

Assigned By:  
Kade Jansson

Responsible Location(s): ⓘ  
KaiNexicon 2023

Collaborator(s):  
Start typing to search...

Current Commitment: 3 Hours per Week  
Current Capacity: [Progress Bar]

Follower(s):

### Capacity Settings - Greg Jacobson

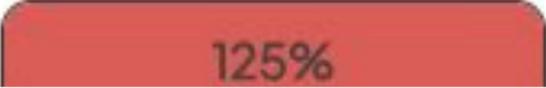
Capacity Category	Description	Max Capacity	UOM	Last Updated
Continuous Improvement	Employee submitted improvements	10	# of Items	05 Sep 2023
Strategy	Projects prioritized by leadership	8	Hours per W...	05 Sep 2023

Save Cancel

Preview Only—Not Yet Available

# Capacity Planning

(167) Project Capacity

User Details	Capacity - Project Ava...
 <b>Alan Moody</b> Username: Alan.Moody@email.com <a href="mailto:Alan.Moody@email.com">Alan.Moody@email.com</a>	 25%
 <b>Alexa Ferrell</b> Username: Alexa.Ferrell@email.com <a href="mailto:Alexa.Ferrell@email.com">Alexa.Ferrell@email.com</a>	 10%
 <b>Allie Koepp</b> Username: Allie	 80%
 <b>Amelia Bridges</b>	 125%

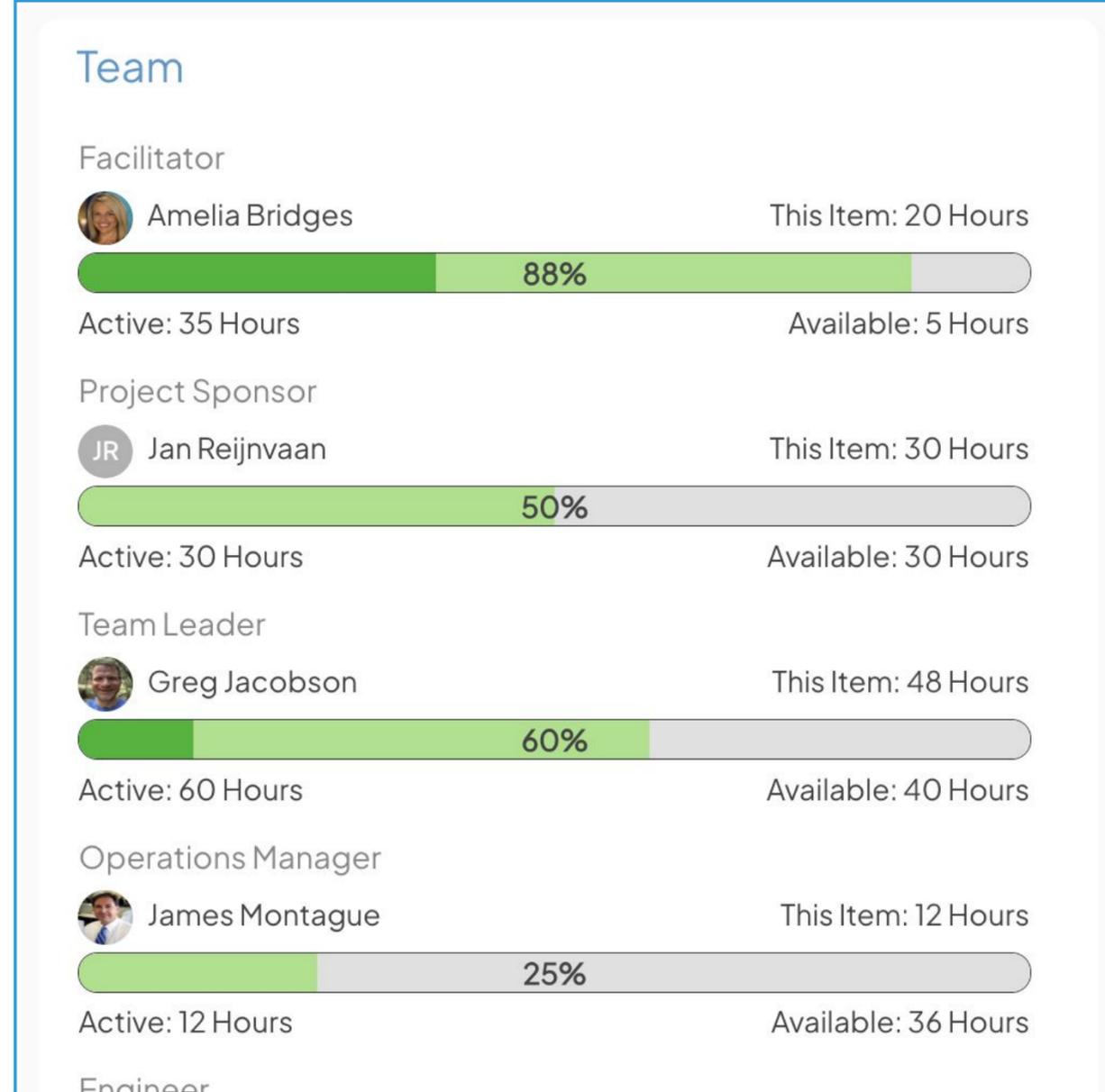
Preview Only—Not Yet Available

# Capacity Planning

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

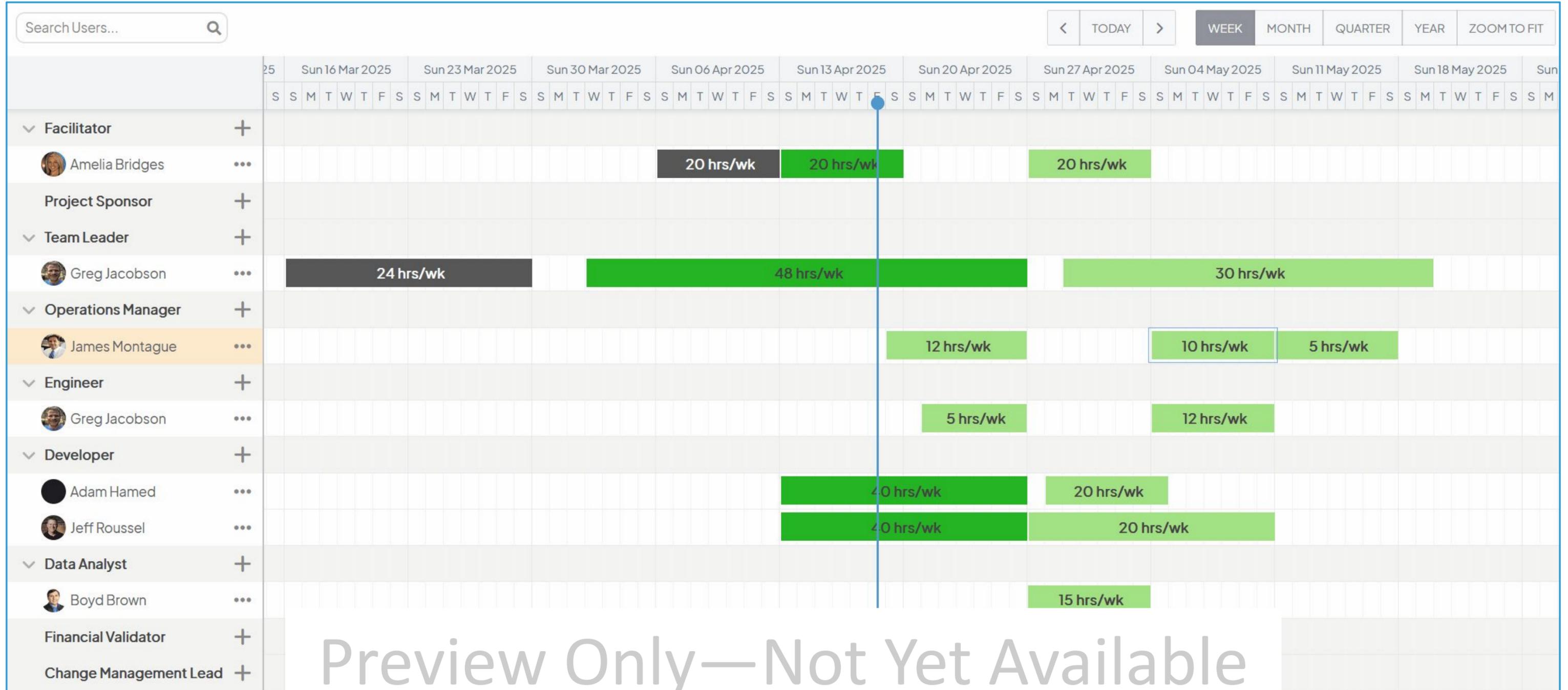
Preview Only—Not Yet Available

# Capacity Planning

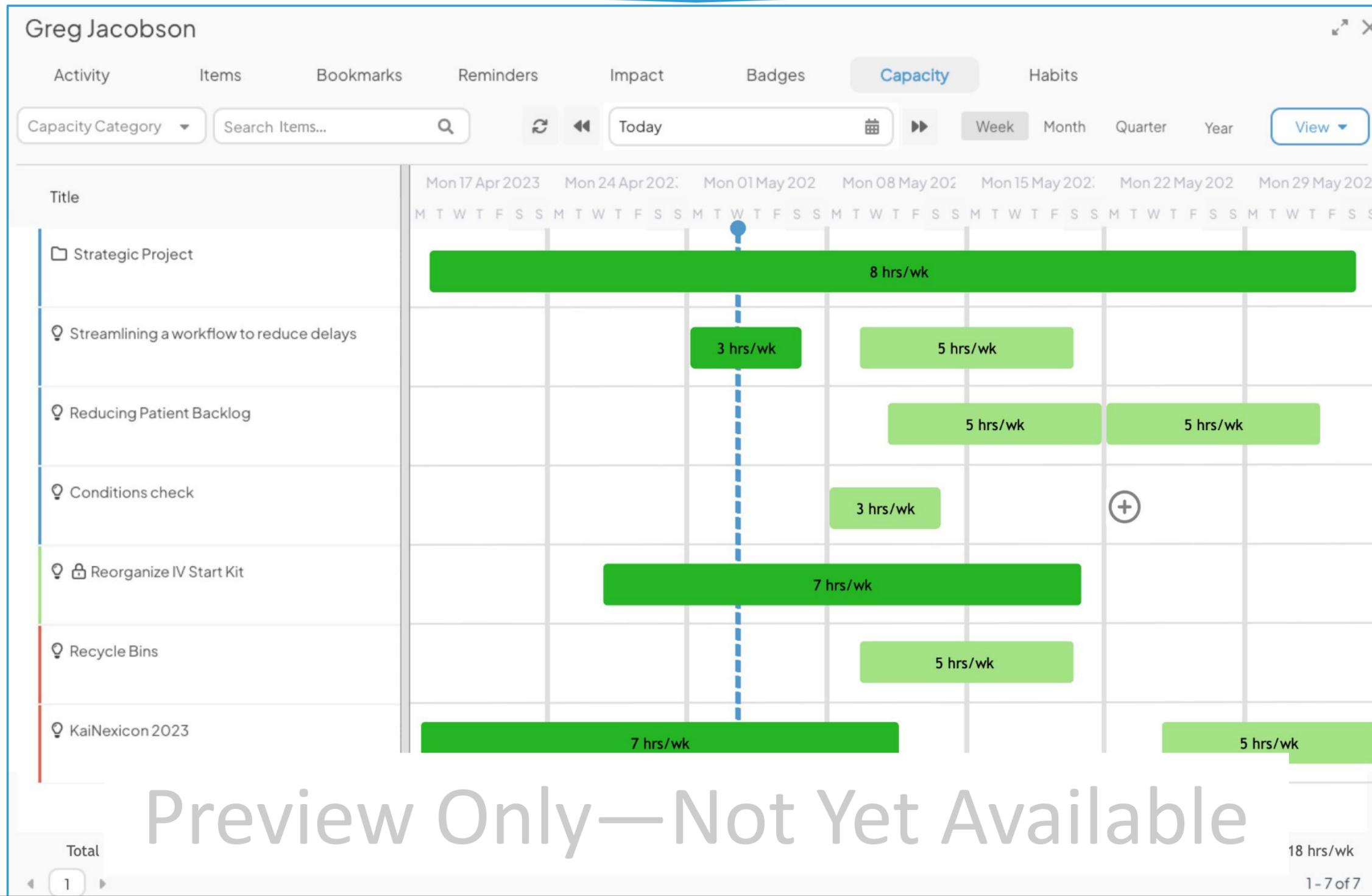


Preview Only—Not Yet Available

# Capacity Planning



# Capacity Planning



Preview Only—Not Yet Available

# Capacity Planning

The screenshot displays the KaiNexus Capacity Planning interface. At the top, there's a navigation bar with 'Dev', 'KaiNexus', and menu items like 'Boards', 'Items', 'People', 'Reports', and 'Admin'. A 'Create' button is prominent. Below this, the 'All Users' section includes search and filter options. The main area is split into 'User Details' and a Gantt chart. The 'User Details' pane shows information for Adam Hamed (Team A), Amelia Bridges (Transportation), Arnold Smith (Austin Transportation), Beatrice Perilloux (Chicago), and Beau Jackson (Austin). The Gantt chart shows capacity usage from Jan 16 to Jan 30, 2017, with bars indicating 'Full', 'Over' (red), and 'Available' (green) states.

User	Network Location	Badges	Mon 16 Jan 2017	Mon 23 Jan 2017	Mon 30 Jan 2017
Adam Hamed	Team A		Full	5h Over	Available
Amelia Bridges	Transportation		2h Available	Available	4h Available
Arnold Smith	Austin Transportation	I	3h Over	4h Over	1h Over
Beatrice Perilloux	Chicago		Full	Full	Full
Beau Jackson	Austin		Full	Full	Full

Preview Only—Not Yet Available



# Assessments

# Assessments

## Administration

### Organization

Network

Configure your organization's structure/hierarchy.

Level Types

Configure the levels that represent your organization's Network (e.g. Department).

Roles

Configure Roles including Permissions and Notification Preferences.

Goals

Configure Goals for your Organization.

Currency Exchange Rates

Configure the Exchange Rates for the Currencies used by your organization.

Time Savings People

Configure the list of people that can be selected for Time Savings Impact Types.

Products

Configure the list of Products that can be selected for Product Impact Types.

Resources

Configure the list of Resources that can be selected for the Resource Impact Types.

Wastes

Configure the list of Wastes that can be selected for Waste Impact Types.

Environmental Impacts

Configure the list of Environmental Impacts that can be selected for Environmental Impact Types.

Cycle Time

Configure the list of Cycle Time processes that can be selected for the Cycle Time Impact Types.

Lead Time

Configure the list of Lead Time processes that can be selected for the Lead Time Impact Types.

Takt Time

Configure the list of Takt Time processes that can be selected for the Takt Time Impact Types.

Standard Work

Configure Standard Work. Standard Work allows you to prepopulate Template Items.

Weighted Scores

Configure Weighted Scores. Weighted Scores provide the ability to rank Item Scores.

Workflows

View the list of your organization's Workflows.

Templates

View the list of your organization's Templates.

Fields

Configure Fields that are used on Templates.

Attributes

Add, remove, or modify the attributes that are used on your organization's Templates.

Multi Chart Importer

Update the data of your organization's Charts via an XLSX upload.

### Assessments

Assessments

Assessment Field

## Create Assessment

Name:

Description: ⓘ

Max # of Assessments Performed: ⓘ

Parent Templates - Auto Create: ⓘ

Parent Templates - Available: ⓘ

Child Templates: ⓘ

Auto Title Format: ⓘ

Preview Only—Not Yet Available

# Assessments

Assessments > 5S Audit

Search Fields...  Show Archived

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

### Create Field

New or Existing Field:  
 New  Existing

Name:

Description: ⓘ

Type:  
Text Area

Required:  
 No  Yes

Additional

Min: ⓘ Max: ⓘ

Preview Only—Not Yet Available

# Assessments

2 of 62 ^ v \* X

Tractor 1 #4976

NEW ▾ 🏠 🕒 📌

All Comments Projects Improvements Incidents Tasks Charts Timeline

[Assessment Name] Create Assessment ▾ 🗄️ ...

1.0 Is the area safe and free from risks?

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

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

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

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

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

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

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

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

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

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

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

**Team**

Author  
Greg Jacobson

+ Follow

**Dates**

Created  
12 Jul 2022

Start  
None

Due  
None

Last Updated  
8 Jun 2024

Preview Only—Not Yet Available

# Assessments

## Create [Assessment Name]



Title:

[Parent Name - Assessment Name Date & Time]

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

Optional

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

Optional

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

Optional



Preview Only—Not Yet Available



# Assessments

2 of 62 ^ v ✖ X

Tractor 1 #4976

+ Add Actions

NEW

All Comments Projects Improvements Incidents Tasks Charts Timeline

[Assessment Name]

Create Assessment [Weighted Score Name]: 96

Completion: 100%

Team

- Show List
- Show Summary
- Schedule

[Name of most recent nested assessment item] COMPLETE

1.0 Is the area safe and free from risks?  
● Yes

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

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

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

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

Dates

Created  
12 Jul 2022

Start  
None

Due  
None

Last Updated  
3 Jun 2024

Preview Only—Not Yet Available

# Assessments

**Recur**

Recurring Items are Items that happen on a regular basis.  
What happens when I make this Item recurring?

Make Recurring?  Yes  No

Once Completed:  Reopen  Create New Copy

Frequency: Required

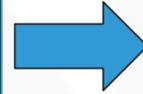
Days to Complete: Immediately

Day of Week

Day of Month

Days After Complete

Save Cancel



**Recur**

Recurring Items are Items that happen on a regular basis.  
What happens when I make this Item recurring?

Make Recurring?  Yes  No

Author: Required

Frequency: Required

Due: Immediately

Day of Week

Day of Month

Daily

Weekly

Monthly

Quarterly

Yearly

complete

Preview Only—Not Yet Available

# Assessments

## Tractor 1 - Assessment 1 Summary

⚠ Partial results shown ⓘ

Completed ii ▾

Past 30 Days ▾

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

Preview Only—Not Yet Available

# Anticipated for EOY

# KaiNexus Support

Welcome! How can we help?

 Search for answers



## The Basics

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



## Admin

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



## KaiNexus Updates

Check out our newest features and latest release notes!