



UNIVERSIDADE CATÓLICA PORTUGUESA

# **The Kaizen Philosophy in the context of SMEs:**

**A case from a Portuguese bus manufacturing  
company**

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A case from a Portuguese bus manufacturing  
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obtain the degree of Master in Management (Generic Branch)

by

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# Resumo

Esta dissertação tem como objetivo examinar os fatores culturais, organizacionais e práticos que influenciam a implementação do Kaizen nas PME's. Foi concebido um estudo de caso de abordagem qualitativa, com quinze entrevistas semiestruturadas realizadas em departamentos como o comercial, o de melhoria contínua e a alta administração. Os resultados demonstraram adesão ao Kaizen, com um elevado nível de aceitação em teoria, mas na prática existem questões por resolver, tais como injustiça nos critérios de reconhecimento e submissão, falta de exemplo das lideranças, o que leva à desmotivação, e ciclo PDCA incompleto, deixando os participantes incapazes de medir a extensão total do seu esforço. Os benefícios são, no entanto, inquestionáveis, melhor organização, melhor fluxo de informação e digitalização, bem como reduções de custos visíveis e poupança de tempo.

Quando comparado com os estudos de caso analisados, percebe-se que o sucesso não depende tanto do contexto, como escritório versus produção, mas dos mecanismos, por exemplo, mostrar aos funcionários as melhorias feitas e porquê, criar rotinas para que as ideias de melhoria fluam. O estudo também oferece sugestões de melhoria, diferentes grelhas de avaliação para kaizens de escritório e produção, tempo semanal para Kaizen, reconhecimento diferente para kaizens administrativos e substituição dos formulários usados neste momento.

As limitações observadas são o âmbito do caso de uma empresa portuguesa fabricante de autocarros, talvez restrito para se poder generalizar os resultados, a perspetiva interna do autor, que pode levar a bias, e o facto de a empresa em questão não ser, em si mesma, uma PME.

**Palavras-chave:** Kaizen; melhoria contínua; Abordagem qualitativa; PDCA; Critérios de Submissão; Alta administração; Reconhecimento; PME; liderança; empresa portuguesa fabricante de autocarros



# Abstract

This dissertation aims to examine the cultural, organizational, and practical factors that influence the implementation of Kaizen in SMEs. A case study with qualitative approach was designed, with fifteen semi structured interviews conducted in departments such as commercial, continuous improvement and upper management. The results have shown support for the Kaizen, with high level of acceptance in theory, but in practice there are visible issues, such as unfairness in the recognition and submission criteria, lack of leadership example, which leads to demotivation, and incomplete PDCA cycle, leaving participants unable to measure the total extent of their effort. Nonetheless benefits are unquestionable, with a better organization, better flow of information and digitalization, as well as visible cost reductions and time saving measures.

When compared to the case studies analyzed, the realization is that the success is not so dependent on the context, such as office vs production, but on the mechanisms, for example showing employees the improvements made and why, creating time space for improvement ideas to flow. The study also offers suggestions to improve, different grid evaluation for office and production kaizens, weekly Kaizen time, different recognition for administrative efforts, and replace the forms used at this moment.

Limitations noted are the scope of a portuguese bus manufacturing company being perhaps too narrow to generalize results, the writer insider perspective that can lead to bias, and the fact the same company is not in itself a SME.

**Keywords:** Kaizen; continuous improvement; qualitative approach; PDCA; Submission Criteria; Upper Management; Recognition; SMEs; leadership; portuguese bus manufacturing company.



# Table of Contents

Acknowledgments.....	4
Resumo.....	6
Abstract.....	8
Index of figures.....	14
Abbreviations List.....	16
1. Introduction.....	17
2. Literature Review.....	21
2.1 Definition and Theoretical Foundations of Kaizen.....	21
2.2 Core Principles of Kaizen.....	23
2.2.1 Continuous Improvement.....	23
2.2.2 Employee Involvement.....	24
2.2.3 Elimination of Waste.....	25
2.2.4 Standardization.....	27
2.3 Kaizen Tools and Techniques.....	29
2.3.1 The 5S System.....	29
2.3.2 Six Sigma.....	32
2.4 Challenges to Kaizen implementation.....	33
2.4.1 Resource Constrains in SMEs.....	33
2.5 Global Perspectives.....	34
2.6 Case Studies.....	35
3. Methodology.....	42
3.1 Case Studies.....	42

3.2	The choice .....	42
3.3	Gathering information & Interview Design .....	43
3.4	Data Analysis .....	43
4.	Results .....	46
4.1	Characterization of interviewees.....	46
4.2	Involvement with Kaizen and Chain of Thought.....	47
4.3	Perceived Benefits.....	49
4.4	Resistance.....	50
4.5	Motivation & Leadership .....	50
4.6	Suggestions for Future Improvement.....	52
5.	Results .....	54
5.1	Involvement & Understanding of Kaizen: Acceptance vs Real Engagement 54	
5.2	Perceived Benefits: Real organizational gains & Administrative relevance 55	
5.3	Challenges & Resistance .....	57
5.4	Culture, Leadership & Motivation.....	58
5.5	Implications for the Design of the Kaizen System.....	60
5.6	Limitations.....	61
5.7	Recommendations for Future Investigation.....	63
6.	Conclusion .....	65
	Appendices.....	67
	Declaration of generative AI.....	207
	Prompts List .....	208
	Bibliographical References .....	209





# Index of figures

<b>FIGURE 1- HOW THE KAIZEN METHODOLOGY ENHANCES LEAN MANUFACTURING PRACTICES? (SIX SIGMA DSI) .....</b>	<b>23</b>
<b>FIGURE 2 - CONTINUOUS IMPROVEMENT WITH 5S AND KAIZEN (A. SELVARAJ, 2025) .....</b>	<b>30</b>



# Abbreviations List

SMEs – Small and medium enterprises

WW2 – World War Two

PDCA – Plan, Do, Check, Act

5S – Seiri (Sort), Seiton (Set in Order), Seiso (Shine), Seiketsu (Standardize), Shitsuke (Sustain)

TPS – Toyota Production System

JIT – Just-in-Time

VSM – Value Stream Mapping

DMAIC – Define, Measure, Analyze, Improve, Control (Six Sigma)

KPI – Key Performance Indicator

QCC – Quality Control Circle

AA – António Almeida

SI – Subject interview

# 1. Introduction

This work corresponds to the final dissertation within the scope of the Master's degree in management at Católica Porto Business School (generalist branch).

The motivation for this study is personal, but also practical. On one hand, it is driven by an academic interest in Kaizen as a business philosophy. On the other, it is inspired by the fact the researcher works in a company that has embraced Kaizen, a Company that has a long-lasting connection to the foundation of Kaizen and has seen firsthand the positive impacts it can have on productivity, quality, and employee engagement. However, he also observed resistance to Kaizen application, and a lack of commitment, particularly among employees who are older, and feel hesitant to change established practices and embrace new ways of performing (Kotter, 1996).

While Kaizen has been widely analyzed in manufacturing contexts, fewer studies have focused on its adoption in administrative functions in Portuguese SMEs. This research aims to address that gap and provide qualitative evidence of an administrative side of Kaizen, while also providing insights of case studies.

Kaizen is a strategy of Japanese origin, which focuses on continuous improvement, it advocates for the implementation of little, consistent efforts over time. Gradually those efforts are expected to provide significant medium and long-term results. The main goal of Kaizen is to improve not only processes, but also encourage every part of the company as well as employee involvement. (Imai, 1997; Liker, 2004).

This study's focus is to identify the benefits and risks identified with the application of Kaizen, particularly the cultural and organizational factors that explain such negative attitude (Brunet & New, 2003).

The relevance of this topic is explained with its potential to help SMEs understand and surpass the obstacles they encounter when adopting Kaizen. SMEs benefit considerably from Kaizen thanks to their adaptable structures and

the impact that even small improvements can bring to their overall efficiency. However, SMEs also face struggles, such as limited resources, informal organizational structures, and the pressure to balance short-term demands with long-term improvements (Bessant & Caffyn, 1997; Bhuiyan & Baghel, 2005).

The objectives of this study can be divided in three. First, it aims to perform a comprehensive literature review on Kaizen, analyzing its benefits, challenges, and the resistance factors. This involves exploring the theoretical foundations of Kaizen, the core principles, and tools, but also the case studies that highlight successful and unsuccessful attempts at the implementation (Singh & Singh, 2009). Second, the study will conduct research within an SMEs that has implemented Kaizen, a Portuguese bus manufacturer, hereinafter Happybus, the real name is withheld for organizational confidentiality. The research in said company allowed to collect qualitative data regarding the cultural, organizational, and practical factors that influence Kaizen adoption (Suárez-Barraza & Ramis-Pujol, 2010). Finally, the third objective is to conduct a comprehensive analysis that analyzes the findings from the literature review, the observations from the case studies, but most importantly, the data gathered from Happybus employees. This analysis will help to unravel common ground, answer the research question, and find solutions to overcome the resistance in adopting Kaizen.

The research question this dissertation aims to address is the following: What are the primary barriers to the successful implementation of Kaizen in SMEs? (Kotter, 1996; Suárez-Barraza & Ramis-Pujol, 2010; Brunet & New, 2003). In answering this question, the research hopes to offer practical recommendations that are beneficial towards both the academic and practical aspects of Kaizen in SMEs.

The literature review will be divided into distinct sections that collectively help in understanding the Kaizen philosophy. The review begins with the history context of the Kaizen and its theoretical foundations, where its definition, principles and its application in lean management is reviewed. Following, and

within the same chapter, the core principles of Kaizen will be addressed including continuous improvement, employee engagement and standardization of processes, (Terziovski, M., 2010). Thereafter, the tools and techniques in Kaizen such as 5S, Six Sigma, and waste reduction will be discussed.

Theory in the first chapters helps to explain Kaizen philosophy, to uncover the narrower topics, and get into why companies refuse to implement it, a broader contextualization is needed. The next chapter will deal with the difficulties that small and medium enterprises encounter in adopting Kaizen; implementation is limited by the availability of resources, fear of transformation, and the presence of corporate informality. The last sections of the review will deal with global perspectives, the different ways Kaizen is understood and interpreted in different contexts, followed by real examples and literature evidence of successful implementations, as well as unsuccessful.

This study aims to be of benefit to the general academic, as well the business practitioners and managers, who seek to implement a culture of continuously improving the organizations to which they belong. (Liker, 2004; Bhamu & Sangwan, 2014).



## **2. Literature Review**

This literature review provides a detailed analysis of the theoretical foundations of Kaizen, its core principles, tools and techniques, as well as the specific challenges faced by Small and Medium Enterprises (SMEs) when adopting Kaizen practices, along with case studies. The target is to prove there is a culture resistance from companies adopting it. The study will have the support of authors that wrote on the topic, and a contradictory point of view will also be addressed. Chapter 1 begins with the theoretical foundations of Kaizen and its core principles.

### **2.1 Definition and Theoretical Foundations of Kaizen**

The Japanese term "Kaizen" has its roots in the Japanese words "kai" (change) and "zen" (good), together they create "good change" or "continuous improvement" and is one of the cornerstones of operational excellence in many of the world's industries. The foundational idea of Kaizen is that small, incremental changes to processes (not people) can result in significant advancements over time, enhancing quality, productivity, and efficiency (Imai, 1997). First introduced in Japan's post-World War II manufacturing sector, Kaizen has a long and storied history, and was famously adopted by companies like Toyota, where it became instrumental in the development of the TPS (Liker, 2004). Unlike "Western" management models that often seek "big leaps" or "big wins," Kaizen focuses on what Japan has termed "continuous, nonstop efforts," with employees at all levels of the organization involved in the change process and in problem-solving activities. Since its inception, Kaizen has evolved to become a popular management philosophy adopted globally, crossing industry

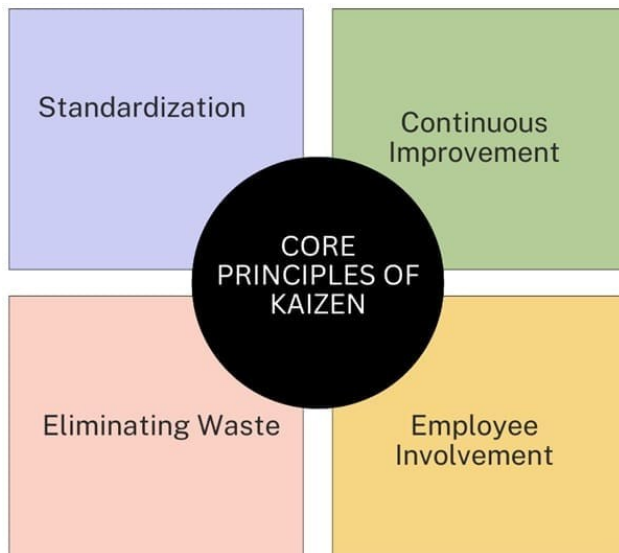
lines to be applied in sectors ranging from healthcare to education. (Imai, 1997; Liker, 2004)

(Imai, 1997) points out that Kaizen is also about building an environment in which every single employee, not sparing the top management and regular workers, tries to seek the improvement of processes. The active contribution of every single worker is essential for the success of any implementation of Kaizen.

Kaizen is fundamentally built on the belief that ongoing, incremental changes driven by employee involvement can lead to substantial improvement over time. (Imai, 1997), who is often credited with introducing the concept of Kaizen to the West, describes it as a comprehensive approach, that extends beyond the production line to include all aspects of an organization.

Foundational work gives insights regarding what Kaizen is and how it works, yet fails to answer to what happens in a real work context, which this dissertation aims to achieve.

## 2.2 Core Principles of Kaizen



*Figure 1- How the Kaizen Methodology Enhances Lean Manufacturing Practices? (Six Sigma DSI)*

### 2.2.1 Continuous Improvement

Continuous improvement: The essence of Lean Thinking lies in the pursuit of continuous improvement. Organizations do not rely on large-scale changes but instead focus on small, long-term improvements that deliver adequate results. This process helps build a culture where improvement is embedded into daily operations, leading to sustained success (Womack & Jones, 1996).

(Singh & Singh, 2009) argue that this gradual, evolutionary change is more sustainable and, ultimately, more effective because it becomes a part of the organization's daily routine.

In *The Toyota Way*, (Liker, 2004) illustrates how Kaizen contributes to Toyota's sustained success by creating a continuous improvement culture into daily work routines. Toyota's practice of regular reflection to recognize mistakes and take appropriate action to avoid re-occurrence (known as hansei) and its structured problem-solving approach, ensure that Kaizen is not just a concept, but an active component of day-to-day operations.

The approach requires that improvements are ongoing and integrated into regular activities, which helps prevent processes from becoming outdated or inefficient, but at what extent do those improvements are integrated smoothly? Are there barriers? Those questions will be addressed when the research question is answered.

## **2.2.2 Employee Involvement**

**Employee Involvement:** This principle of Kaizen defends the involvement and participation of employees. The philosophy assumes people doing the work are best suited to find problems and design better ways of work. Therefore, Kaizen appreciates the participation of everyone and makes them feel that they are a priority in the improvement process (Brunet & New, 2003).

Unlike Top-Down styles of management, Kaizen adopts bottom-up, featuring ideas that come from the people at the front addressing key issues and producing solutions. This participative aspect that (Brunet & New, 2003) point out is in fact one of the most important aspects of its success, since employees that are working on the processes are usually the ones best suited to identify problems and suggest measures to improve the work process.

(Maarof & Mahmud, 2016, pp. 4-5) argue that even though the worker's knowledge is key to boost the day-to-day operations, and is described as the most

important resource, most companies still don't give the right value to those employees, not being able to take full benefit from their know how. The reason for that can lie, for example, on hierarchical structures or fear of failure.

This dissertation aims to prove if, indeed, companies don't give the right value to employees, and why that happens, in a real company context.

## **2.2.3 Elimination of Waste**

The goal of Kaizen is to eliminate all types of waste, such as over production, excess of inventory, transportation, defects (Liker, 2004). Kaizen helps to reduce waste so that organizations can utilize resources properly and lower costs. In Kaizen terminology, waste is any activity that uses resources without adding any value. Waste is generally classified into three types: Muda, Mura, Muri. Collectively these three concepts represent the core domains of inefficiency that Kaizen seeks to eliminate.

Waste can exist in different forms, and this dissertation aims to look at contexts where it is also less visible, which can lead to resistance.

### **Muda (Waste)**

Muda, which means "waste" in Japanese, refers to any activity that consumes resources but does not create value for the customer. (Hines & Rich, 1997) identifies seven types of Muda commonly found in manufacturing and service industries: overproduction, waiting, transportation, overprocessing, inventory, motion, and defects. Kaizen's focus on eliminating these wastes aims to streamline processes and maximize resource utilization.

Overproduction is described as the worst most serious type of waste by (Hines & Rich, 1997), since it results in excessive lead and storage times, as well as affects quality and productivity.

### **Mura (Inconsistency)**

Mura means inconsistency of operations, production, or flow. It can happen in different ways, such as uneven cycles, uneven load, or output quality. As an example, in production, line work at different speeds, and some stations get overloaded while others stay idle, and so time and resources are wasted (Ohno 1988, as cited in Liker, 2004). Usually, it is the result of poor planning or fluctuations in the schedule, although in some cases it is a consequence of external factors, such as changing consumer demand, or internal factors, such as uneven skill level between employees.

Toyota directly attempted to eliminate Mura through their application of so-called just-in-time (JIT) production systems, which only allow materials and products to flow right at the required time and in the exact amounts required to avoid overproduction or shortages (Liker, 2004). Another commonly used method for reducing Mura is Takt Time, a German concept that means “pulse” or “beat”. Takt Time can be explained as applying the required rate to complete products so that they match with customer demand, avoiding delays and excessive stocks (Yamamoto & Bellgran, 2010).

### **Muri (Overburden)**

Finally, Muri reflects the “burnout” of people or equipment. When employees or machines are pushed beyond their limits, which can cause breakdowns, defects, safety issues, and decreased efficiency (Liker, 2004). Overburdening often shows when the previous explained Mura (inconsistency) is present, creating a bigger problem and showing that the various principles, and sub principles of Kaizen can be cumulative (Hines & Rich, 1997).

## **Cultural Resistance in Implementing Kaizen's Waste Elimination**

(Bhasin, 2012) argues that resistance to change is often caused by fear of the unknown, particularly when employees fear an impact on their roles. Strict organizational structures tend to keep the old habits, not engaging in waste reduction or any other form of Kaizen, which can be seen when employees are not encouraged and sometimes even ignored when offering suggestions or improvements, not following the principle of employee involvement.

The main strategies to overcome cultural resistance of Kaizen are establishing trust between leadership and employees, (Gapp et al. 2008) defend that transparency in communicating the purpose of the waste we want to eliminate fosters a culture of collaboration and collective responsibility, also involving employees in the process of identifying waste, having a strong leadership which inspires and motivates employees (Bass & Avolio, 1993).

## **2.2.4 Standardization**

Standardization is a vital part of sustaining improvements in Kaizen, ensuring stability, consistency, and makes sure changes are not temporary measures, but instead applied in daily operations (Liker, 2004). Kaizen focuses on gradual improvements rather than radical changes, however, in the absence of a stable base, or a reference point for work, it becomes difficult to measure if an improvement has been made. Standardization fills that gap and creates a foundation to ensure that every step of the process has the same structure, a guideline approach. Standardization allows organizations to make sure that their products/service meet the quality standards, supports in training employees, and assists in long-term process sustainability (Liker, 2004).

It eliminates, or helps to eliminate repetitive steps, and resources can be managed more effectively across operations. Standardizing work practices also

results in decreased cycle times and operational cost for companies as processes become more predictable and exhibit fewer bottlenecks (Hines & Rich, 1997).

Organizations such as Toyota and Bosch have demonstrated that standardization allows them to increase quality and give it consistency, reduce variability, and scale process improvements (M Ā kva et al., 2016). According to this view, standardization can't be seen as a constraint, but a foundation for innovation, as it provides a structured approach deal with inefficiencies and evolve as a business (Liker, 2004). Standardization is closely linked to Just-in-Time (JIT) production, ensuring that the process and every step of it is optimized to maximize efficiency and reduce waste (Hines & Rich, 1997).

## 2.3 Kaizen Tools and Techniques

There is a wide variety of tools and techniques that support the Kaizen's philosophy and allow organizations to implement its principles in a structured form. The two best-known and most widely applied Kaizen methodologies are the 5S system and Six Sigma.

### 2.3.1 The 5S System

The 5S methodology is a Kaizen tool which is used to eliminate waste, organize, and make any workplace more efficient (Gapp, et al. 2008). Developed in Japan by Hiroyuki Hirano, an author who describes well the 5S in the book 5 Pillars of the Visual Workplace and couldn't be cited as the source is not available. Hirano is widely cited in research, for example in (Gapp, et al. 2008). 5S was initially used in the manufacturing industry to boost efficiency on the line of production and consists of five principles: Sort (Seiri), Set in Order (Seiton), Shine (Seiso), Standardize (Seiketsu), and Sustain (Shitsuke).

- Seiri (Sort): removes unnecessary items to ensure that only essential tools, materials, and equipment are left in the workplace. The main target focuses on eliminating waste by removing unnecessary obstacles in the work environment that does not contribute but impede the process (Gapp et al., 2008).
- Seiton (Set in Order): Aims at arranging tools and materials in an orderly manner, so that employees can reach them easily and utilize quickly. This makes use of the mantra "a place for everything and everything in its place" and aims to have workplaces organized in such a manner that prevents unnecessary movement (Singh & Ahuja, 2014).

- Seiso (Shine): Involves periodic cleaning and maintaining the workplace environment to ensure safety and organization (Gapp et al., 2008). Companies that implement Seiso into their daily processes report that accidents and injuries have decreased, and the workplace environment is more engaging.
- Standardize (Seiketsu) Can work as a control mechanism, ensuring the first three 5 S principles Sort, Set in Order, and Shine are implemented in the same manner throughout the organization. This means recording best practices, setting explicit guidelines, and training staff to keep their improvements (Bessant & Caffyn, 1997).
- Shitsuke or Sustain: the final step of 5S emphasizes building a culture of discipline and continuous improvement (Gapp et al., 2008). Unlike the previous stages, Shitsuke is a continued effort that needs to be practiced consistently by leaders and employees alike to sustain and strengthen the already established 5S standards (Suárez-Barraza & Ramis-Pujol, 2010). Organizations with a high focus on Shitsuke have been reported to have higher rates of employee engagement, fewer process violations, and long-term sustainability of Kaizen (Singh & Ahuja, 2014).



*Figure 2 - Continuous Improvement with 5S and Kaizen (A. Selvaraj, 2025)*



## 2.3.2 Six Sigma

Originally introduced by Motorola in the 1980s, Six Sigma focuses on process improvement through data analysis and statistical methods to reduce defects and variability. The principles in Six Sigma also closely align with Kaizen's continuous improvement philosophy (Bhuiyan & Baghel, 2005). The core methodology of Six Sigma is DMAIC — Define, Measure, Analyze, Improve and Control.

- **Define:** When Project objectives and customer needs are defined. This step is critical in defining the scope for the improvement project and ensuring it aligns with the needs of the organization as well as the customers (Bhuiyan & Baghel, 2005).
- **Measure:** Data is collected to understand current performance levels (a baseline). Measurement is essential to assess the current state of the process and know the areas of improvement. This stage frequently utilizes statistical analysis and process mapping tools such as VSM (Antony, 2004).
- **Analyze:** The collected data is then analyzed to determine the root causes of defects or inefficiencies (Monday, 2022). This phase helps in ensuring that the improvements are data driven by focusing on root cause analysis and problem solving, which is why Kaizen puts so much emphasis on root cause analysis.
- **Improve:** Creating and implementing solutions that will eliminate the root causes identified in the Analysis phase. Six Sigma encourages the testing of these solutions on a smaller scale before implementation to ensure they work (Monday, 2022).
- **Control:** The goal is to sustain the progress made in the Improve phase. Control plans, monitoring systems and frequent audits are introduced to

guarantee that the process continues to be managed and results are maintained long term. This stage echoes the Kaizen concept of standardization as it makes the changes expected to become a part of procedures (Monday, 2022).

## **2.4 Challenges to Kaizen implementation**

Cultural and organizational barriers are major factors undermining the application of Kaizen in SMEs. Such reluctance is primarily attributed to apprehension of increased workload, displacement of job security, or threatened position (Kotter,1996; Bhasin, S. 2012).

Kaizen adoption is heavily influenced by organizational culture, especially in smaller and medium sized enterprises where most communication is informal and procedures are less structured. As a result, such informal structures are difficult to formalize and standardize. (El Amine & El Hadri, 2021) support this view, as they identify organizational culture, characterized by the absence of strategic vision, lack of formal procedures and informal communication, as one of the main barriers to the implementation of Lean/Kaizen in SMEs.

In the case of continuous improvement, trust is key, but some organizations struggle to develop it, leading to employees doubting management's intentions.

These barriers require strong leadership, clear communication, and proper levels of employee involvement to overcome to foster a culture that can support ongoing adoption of Kaizen (Bessant & Caffyn, 1997).

### **2.4.1 Resource Constrains in SMEs**

Limited resources make it even harder for SMEs to adopt Kaizen practices. Small and medium-sized enterprises often have limited financial, technological,

and human resources that make it challenging for them to fully practice Kaizen. Due to financial constraints, they are unable to hire specialist consultants or expend resources on in-depth training programs (Bhuiyan & Baghel, 2005). To ensure effective implementation of Kaizen, SMEs will have to use the simplest and least-expensive methods in doing so, like building of in-house mentorship, Kaizen circles and projects driven directly by employees. Literature highlights that these measures and practices have a unique way of reducing the scarcity of resources that is essential for genuine upgradation of existing processes without making huge investments (Suárez-Barraza & Ramis-Pujol, 2010; Bhamu & Sangwan, 2014).

## **2.5 Global Perspectives**

Origination in Japan, Kaizen has application in different contexts, and in each place the characteristics are different.

In Germany and Japan Kaizen has been integrated into corporate cultures that used to be characterized by structured and more disciplined environments. Toyota and Bosch are good examples of successful global integration. The application of Kaizen methodology has shown to improve efficiency and process quality in these companies. (Doberanzke, V. 2020).

On the contrary, Western countries like the United States and the United Kingdom are examples of places where Kaizen finds more resistance on its implementation, often as a result of cultural norms that tend to favor individual autonomy over the structured Kaizen methodology, which focuses on the collective processes. The cultural barriers just mentioned often result in skepticism of the workers towards Kaizen, against standardization and the rigidity in Kaizen approaches (Bhasin ,2012)

In developing economies, such as India, Brazil, and Colombia, Kaizen implementation has different challenges to face. Infrastructural problems, less

skilled workers, and more resistance to change, the last one having a reasoning in less educated workers (Suárez-Barraza, M. F., & Ramis-Pujol, J. 2010).

Even with all the challenges, SMEs in developing countries have been able to adapt and implement Kaizen with success, customizing methodologies according to local needs, implementing incremental changes rather than aggressive reforms, and creating a culture of continuous training and employee engagement (Suárez-Barraza & Ramis-Pujol, 2010).

Italian SMEs are an example in customized industries, as described by (Rossini & Audino, 2020) for adapting Kaizen methodologies to keep the necessary flexibility while doing make-to-order operations. Even with premature resistance, operational improvements were demonstrated. Similarly, Portuguese SMEs in the food retail sector have used Kaizen to create operational resilience, employee involvement and structured methodologies to face challenging times such as COVID-19 (Silva et al., 2021).

Next the researcher will highlight different case studies to prove the global perspectives just mentioned, and that will be important to compare with the investigation ahead and answer the question of investigation, “What are the primary barriers to the successful implementation of Kaizen in SMEs?”

## **2.6 Case Studies**

### **Case Study: Industrialized Homebuilding Company (Louisiana, USA)**

(Nahmens et al, 2012) reported on a case study that examined the extent to which the deployment of Kaizen influenced employee perceptions and organizational outputs for a very manual industrialized homebuilder in Louisiana, USA.

The first attempt with Kaizen faced severe cultural resistance, particularly from older workers, who were used to their traditional ways and skeptical of different tools. Standard work and Kaizen events were 'hard sells' and uncomfortable for many employees who were used to work in whatever manner they pleased.

To face these challenges, the organization's management adopted a participatory method by engaging its employees in the identification of problems and recommendations of solutions in Kaizen events. This reduced skepticism, boosted employee job satisfaction by 11.4%, productivity rose, and there was a measurable drop in operational waste. The research found that resistance to Kaizen can be successfully overcome when cultural engagement, clear communication, and visible commitment from the leadership is provided (Nahmens et al, 2012).

This case has shown that even in environments where tradition and individual working habits are powerful, a change of culture towards continuous improvement is achievable when the employees are engaged, and the positive effects of change are pointed out in a clear way.

### **Case Study: Failed Kaizen Implementation in a U.S. Community Health Center**

In contrast, an illustrative example of failed Kaizen application is detailed in the (American Institutes for Research report, 2012) that analyzed a U.S. Health Center looking to embrace Lean and Kaizen ideals. The organization was amid a transformation to facilitate patient care, reduce waiting time, and minimize the redundancy of workflow. Despite the initial support shown by senior management towards the Kaizen initiative, numerous cultural and operational issues prevented the adoption of its practices.

The primary barrier was resistance from frontline staff, especially some of those with the longest experience in the organization. Fear of losing their job, increased workload, or being subject to more scrutiny were expressed by many employees, followed by poor consultation leading to lack of role specific communication and inadequate training, which would have helped staff understand why the changes were happening and how they added value. Although leadership was attempting to promote engagement, several change initiatives had led to confusion and lack of attention for Kaizen. In the end, the opposition was never defeated, and implementation fell short without converting the system as intended. (American Institutes for Research report, 2012).

#### **Case Study: Mexican SME in Public Services (Suárez-Barraza & Ramis-Pujol, 2010)**

(Suárez-Barraza and Ramis-Pujol, 2010) analyzed a Mexican SME in human resource service processes. Kaizen applied intended to streamline internal administrative processes, provide better customer service and reduce inefficiencies. However, the office service-oriented setting of this organization provided unique challenges to the implementation.

A significant issue in the case study was high levels of resistance among administrative and office staff. Since the administrative process was abstract and unclear, it was hard for the employees to see the benefits from Kaizen, and they found it hard to avoid skepticism, leading to low motivation. Furthermore, staff saw Kaizen as an extra bureaucracy, rather than productivity improvements with substance. This mindset has served as a major barrier to the continuous improvement, and as a result, stakeholders and practitioners finding interest in the initial stage was marginal.

To address such barriers, leadership implemented communication, training, and employee engagement strategies. They used workshops to involve staff in identifying waste and building new solutions, thereby creating a greater sense of ownership and responsibility. The methodology changed the mindset toward Kaizen of the workers from it being an external demand to being a useful tool for process improvement and employee involvement.

At the end of the day, the SME achieved significant gains in administration efficiency, shorter waiting times for customers, faster processing of documents and happier customers. Concluding that developing office-based protocols was key to overcoming early resistance.

### **Case Study: Establishing Kaizen in Small- and Medium-Sized German Enterprises (Doberanzke, V. 2020)**

In another scenario, (Doberanzke, V, 2020). used German small and medium-sized enterprises to see the integration and implementation of Kaizen, targeting mainly manufacturing and technology-oriented entities. Despite the disciplined approach to manufacturing associated with Germany, Kaizen found a unique environment since that disciplined approach is mixed with a strong history of precision engineering and constant improvement.

The study also managed to showcase the comparative advantage that SMEs have when implementing Kaizen, flexible organization, flatter hierarchy, and their decision-making process is considerably shorter. However, the German SMEs still had a fair share of issues associated with cultural resistance to change due to the belief that standardized processes and continuous change represent additional workload. Employees based their concerns on the fact that Kaizen would compromise their job and autonomy. The response from the most successful German SMEs (which the authors keep anonymous) was to use employee involvement strategies such as workshops, open communication, and consistent leadership presence.

Subsequently, the study concluded that a successful Kaizen concept requires a double-edged strategy that takes advantage of the SME size while understanding and compensating for the limitations of a small-scale operation. Thus, the prioritization of small, incremental, and visible steps, along with involving employees at as early of a stage as possible, are essential to mitigate resistance and develop the principles of continuous improvement in a sustainable way over time.

### **Case Study: Resistance to 5S Implementation in a Portuguese Hospital Furniture SME**

Finally, a study conducted by (Amorim & Pires, 2015) investigated the implementation of the 5S methodology in a Portuguese SME, in the hospital furniture sector, and showed that not every Kaizen implementation is successful.

The company adopted 5S in a continuous improvement strategy, however the initiative faced strong resistance from employees, especially senior employees as in the previous case studies, who demonstrated reluctance to abandon established routines and skepticism about the usefulness of the proposed changes.

Resistance was felt in passive attitudes towards training sessions, rejection of new responsibilities, and fear of increased workload or even job losses. According to the authors, this cultural resistance was deeply rooted in the company's informal organizational structure, marked by a culture of low turnover and a strong emotional attachment to traditional work methods. Management tried to solve the issues through internal awareness campaigns, or the application of questionnaires to assess employee engagement, nonetheless, the results revealed that, despite some minor improvements, the lack of a real employee commitment and the absence of a clear leadership plan ultimately compromised the consolidation of 5S. This case proves once again that culture

factors can undermine the success of Kaizen, especially the senior employee factor (Amorim & Pires, 2015).

### **Toyota's Woven City: A Futuristic Application of Kaizen Principles**

As an additional case, the researcher wanted to show a futuristic approach to Kaizen. Toyota's Woven City (rising at the base of Japan's Mount Fuji) is the very embodiment of a future leaning in promise to stretch beyond manufacturing practices, and into the fields of urban design, innovation and sustainability. Planned to function as a complete, living laboratory, this city will test developing technologies such as autonomous vehicles, robotics, AI, and alternative mobility along with people and new infrastructure in a true world living lab enabling Toyota to continue to learn, develop and promote connectivity beyond traditional manufacturing (Toyota Motor Corporation, 2020).

Key to the philosophy of Woven City is to consider it lab for its residents in which they can live, work and play with like-minded pioneers, who are encouraged to challenge themselves, and the culture, and feedback to the city so that it can become the city that they envisioned. Conceived as a "living laboratory," the city directly encourages research and innovation to work together with residents and industry to solve problems and make incremental improvements. Covering the latest in technological advancements, community interaction and planning, Woven City reflects the Kaizen culture driven across generations, which also presents a new vision for how the concept of Kaizen can be applied in the future at a city and at the level of society (Toyota Motor Corporation, 2020).



## **3. Methodology**

In this chapter, the methodology chosen for this work of investigation, and respective techniques for gathering information, is presented.

The method of investigation applied is qualitative (Creswell, 2007, p.36). The choice is explained by the need to understand how the subjects, workers of the company chosen, understand Kaizen and where does the resistance manifests. All participants were anonymized and assigned codes, Subject 1–15, no personal identifiers were recorded, and responses were treated confidentially

### **3.1 Case Studies**

The qualitative strategy adopted is the case study, (Creswell 2007, p. 74) describes this strategy as the study of cases based on multiple sources of information and gathering of detailed data. It is an exploratory case study, as the goal is to understand the cultural barriers on the implementation of Kaizen, in the Portuguese context, that were not yet explored in detail. For the purpose, Happybus was chosen.

### **3.2 The choice**

The decision to choose Happybus was, in part due to the fact the researcher works in the same company, but also his own direct connection to the implementation of Kaizen, being Kaizen Pivot in his department.

Happybus, given its old professional relationship with a founder of Kaizen, even having Japanese workers in every area of the company, has been implementing Kaizen for some time, gaining experience, evolving, and being a pioneer in the continuous improvement path. The researcher considered it would be impossible not to explore this connection deeper.

After Choosing the topic, the writer started to engage in conversations about Kaizen within the Company, looking for more information on the processes, on the culture regarding Kaizen, and if the people involved would be willing to talk about it.

### **3.3 Gathering information & Interview**

#### **Design**

In order to answer the question of investigation, What are the primary barriers to the successful implementation of Kaizen in SMEs? 15 interviews were scheduled, in a semi structured format, to different people within Happybus. 12 Interviews were scheduled via Teams (20-25 minutes), and recorded, and 2 were answered in writing. Sampling was purposive, to identify the variation in Kaizen involvement and seniority, and was done successfully, as most People interviewed belong to administrative departments, but also from the department directly involved with Kaizen, and the upper management. The inclusion criteria was 1 year in the company. 15 interviews was the maximum number of interviews before saturation of recurring themes.

Additionally, the researcher was also able to answer the questions he made to others, as he thinks his own experience is valid.

The guide covered questions about the experience with Kaizen, benefits and challenges, their opinions on leadership and motivation, and suggestions for the future.

### **3.4 Data Analysis**

Interviews were transcribed using Microsoft Teams' automatic system, perfected with Turboscribe, and data analysis took place using thematic analysis, which allowed the structured interpretation of the qualitative findings (Matthew B. Miles & Huberman, 1994). The method chosen aligns with the exploratory nature of the research, helping to identify patterns and insights relevant to develop the present study. The analysis developed in four stages, familiarization with the data, coding of relevant passages, categorization of the most relevant findings, and final review of findings.

After reviewing the transcripts, relevant themes were identified, such as benefits of Kaizen, ideas of resistance, production vs. office dichotomy, and findings on leadership, grouped in a broader analytic framework.

Coding was done through transcripts read iteratively, clustering the codes into themes, and aligning them with the research question. To increase quality and reliability, the researcher kept recordings of the transcriptions, notes and themes list, while also searching for counter examples. This interpretive process made sure the framework was conceptually grounded while also empirically validated. Peer debriefing was conducted with the supervisor to discuss coding/theme structure and develop interpretations.

Regarding ethical considerations, participation was voluntary, informed, and participants identities anonymous, no job titles that could reveal identity are shown. Files were stored securely and will only be used for academic purposes.



## **4. Results**

This chapter analyzed the results of fifteen interviews made to Happybus collaborators, with the goal of comprehending the internal perceptions and sensations of those people regarding the Kaizen implementation process within the company. Questions were made about their experience with Kaizen, their involvement with it, the advantages and disadvantages they see, and their perception on resistance, among other topics.

The data was analyzed to identify patterns, different and coincidental opinions, without interpreting the same data, which will be addressed in the discussion chapter.

### **4.1 Characterization of interviewees**

The interviewees are from different areas of Happybus, although they all perform administrative functions. Participants include members of sales, marketing, technical, Kaizen implementation departments and administration. Most of the interviewees have between one and three years of experience at the company, but there were also some with more than 10, which allowed the study to observe the perceptions of newer employees and those involved in the Kaizen system for a longer time.

There is AA, the writer of this dissertation, Kaizen pivot in the sales department, who has a more in-depth knowledge of the methodology, with medium-high involvement. Meanwhile the previous Kaizen pivot, Subject L, who has since left the company earlier in the year, also has a deep knowledge. Subject M and Subject N belong to the continuous improvement department and are the testimony from those who monitor the cross-department implementation of the Kaizen process in the company. The remaining interviewees—Subject G,

Subject A, Subject F, Subject K, Subject E, Subject H, Subject D, Subject I, Subject L and Subject J have a medium Kaizen user perspective. Subject C has a perspective from a native Japanese point of view, and Subject B offers an inside from a previous Kaizen environment experience.

This suggests every one of the samples provided their own picture of what they believe Kaizen is, what good or nefarious it has done, and what needs to be improved. Making the analysis very heterogeneous and complete in its main goal, analyze Kaizen in Happybus, and answer the question of investigation, What are the primary barriers to the successful implementation of Kaizen in SMEs.

## **4.2 Involvement with Kaizen and Chain of Thought**

Respondents demonstrated a good level of understanding of the Kaizen concept, associating it with the principles discussed previously, continuous improvement and waste reduction for example. Subject G was unfamiliar with the methodology before joining Happybus, but quickly understood its importance and developed a critical thought about the process, referring that the Kaizen pivot of her area did not promote it, and when that person changed, all process and her own involvement became deeper. Subject G also referred her most productive Kaizen was a SharePoint archive, to organize work. On the other hand, Subject I and Subject D, commercial and administration respectively, are not as involved with Kaizen as they would like to be, but both comprehend what it means, and Subject I described Kaizen as “a natural way to be on an organization”.

Subject E and Subject A share a similar view, considering their Kaizen level to be medium low, with Subject A jumping right to the thought of Kaizen in Happybus not being a big focus in his area of marketing, and more focused on

production work, he believes he is being forced to engage in Kaizen activity just to fill the quota of two kaizens per year, which does not help his work in any form. Subject E described being in a production department before and not having submitted kaizens.

Most interviewees noticed the annual requirement to submit a defined number of Kaizens, two in the case, Subject H and Subject A pointed out that meeting this objective is often seen as a formal requirement rather than a spontaneous improvement practice. This perception was corroborated by Subject B and Subject K, who indicated that they felt the process is “part of the routine” rather than an initiative motivated by the need for transformation.

AA, Subject N, Subject M and Subject L are the ones who show a higher involvement with Kaizen, and each one has a different perspective. AA pointed out that, although the philosophy is well publicized, “the practical application and evaluation criteria remain poorly suited to the administrative reality. While Subject M, with a background of process engineering, believes Kaizen is all about creating critical spirit and changing mentalities, admitting that Kaizen in the production site is easier to implement. Subject N argued that the submission of kaizens is not important, but the feeling of continuous improvement, and doing it by principle, which he believes will grow in the future. Subject L was, and still is, very close to Kaizen as a pivot, now in another company, and she described the evaluation of kaizens, with gold silver and bronze “medals”, which motivated people each month to submit improvements.

On the other hand, Subject C, a Japanese employee, noted that there is a conceptual difference between Kaizen as applied at Happybus and as practiced in Japan, pointing out that in Japan, the focus is not only on the proposal, but above all on verifying the real impact of the improvements—something that, in his view, still needs to be developed within the company.

Subject F was the outlier, not contributing too much to Kaizen at date, and considering the company to be promoting “useless kaizens “, as he believes employees make a mockery out of what should be a serious process.

## 4.3 Perceived Benefits

Regarding benefits of Kaizen in Happybus, almost all the respondents answered that it has, indeed, brought positive things to the company, most reported improvements in organization, internal communication, process efficiency, and team spirit, and the ones who have been here for longer all observed long term positive changes. Nonetheless almost all admitted the most benefits and best use is in the production area, apart from Subject I, who is not in office as much, Subject D, the administrator, who answered politely but still acknowledged the difference, and Subject M and Subject N, who observe all kaizens, and in that observing role believe it is useful in all areas.

Subject G suggested that the annual goals, although it may be seen as forced, or an obligation, “keeps the focus on continuous improvement alive” she believes without that push people wouldn’t do it for themselves and forcing that way of work is a benefit Kaizen brought. Subject M noted that it made people look at their work and optimize it, think critically, while Subject N thinks the biggest boost was the development of people, and like Subject M, critical thinking.

Subject F believes it brought development and innovation, but also arrogance and loss of time, as he believes people don’t take it seriously.

Among the specific examples of kaizens, AA mentioned the replacement of the digital signature system with a cloud platform, which reduced waiting times and increased the department's autonomy. Subject A mentioned the creation of a digital catalog system using QR codes, which contributed to reducing costs and printed materials. Subject H explained the use of task management tools, such as Trello, which improved the organization and monitoring of the technical team's work.

The consensus is that Kaizen, with its limitations, contributes positively to the company's operations, and has had a positive long-term impact.

## 4.4 Resistance

The issue of resistance to Kaizen was addressed from multiple perspectives. Some suggested the system of evaluation is a cause of resistance, others think it's because it's an obligation and people don't feel motivated, while others answered they don't even think there is resistance at all as they never seen it.

Subject G believes the main problem is the methodology of the Kaizen not being adapted to all areas of the company, as she does not think it's a motivation problem, and has not seen resistance, she does accept that sometimes lack of time can also be an issue. For Subject H the main challenge is making Kaizen a habit integrated into daily work. Subject A and Subject E pointed out the obligation as an issue. AA and Subject B also emphasized, as Subject G, that the evaluation model being overly oriented toward production can demotivate employees from administrative areas.

Subject J indicated there is a lot of resistance from colleagues, even pointing names, and the cause is that some workers don't want to adapt to new ways. While Subject B gives a new insight, believing that resistance is a cultural problem, and that employees in Happybus don't have the roots of Kaizen, and resist because they don't want to step out of their "comfort zone".

Subject C warned about the importance of assessing the real impact of Kaizens, arguing that "proposing improvements is not enough if there is no verification of effectiveness," while Subject M blamed the resistance on employees who only see the points in the Kaizen form, and don't do it if it doesn't give many points.

Finally, Subject F did not see a lot of resistance, instead lack of pride, and believes it is more accepted in the production area because "there, all improvement is a Kaizen, and not every Kaizen is an improvement"

## 4.5 Motivation & Leadership

Most respondents recognized that Kaizen philosophy is part of Happybus' identity, associating it with the influence of the Toyota's Japanese culture, but some also point out the Portuguese culture as a difficult match with Kaizen. Some of the interviewees suggested the leadership supports Kaizen, while others referred some bosses don't give the example. All stated that feedback is crucial and that Kaizen in Happybus is more of an obligation than true motivation.

Subject H noted that "continuous improvement is rooted in the company's structure and leadership," observing, however, that "it does not always translate into effective practice in day-to-day administration."

Subject G, as explained before, thinks the obligation to submit kaizens is positive, and on the other way around, Subject A considers that "mandatory requirements turn the process into a routine, rather than an incentive for genuine improvement. "Subject G also goes in detail about the culture identification, labelling Happybus culture as Portuguese type, of quick short-term solutions, which doesn't match the long term methodic Japanese Kaizen culture.

Leadership was described as a key element in sustaining the Kaizen culture. AA and Subject N stated that the commitment of middle management is crucial, and Subject J believes the same middle management does not give the example to motivate the lower employees, even though she thinks lack of time is a reasonable justification. Subject C also had doubts if his direct management is committed. Subject H emphasized that "organizations are taken over by their leaders," the example set by superiors is essential for Kaizen to be taken seriously. Subject L believes the leadership of the pivot is crucial to have less resistance, a view also shared by Subject G.

Subject N asserted that the cultural mentality to implement Kaizen fully takes 10 to 15 years for it to be a real implementation, a view shared by Subject M. Subject N answered that "we make the culture", and not because we are Portuguese or Japanese. Subject C said that more than culture, the specific situation of the company affects Kaizen the most, the amount of work to be done for example does not allow him to think too much about it now.

## 4.6 Suggestions for Future Improvement

The suggestions focused on the need to review the Kaizen submission and evaluation procedure, especially in administrative environment, a view shared by most people interviewed.

Subject D suggested the creation of a user-friendly platform to simplify the Kaizen submission process, while arguing for a more listening environment where everyone can contribute, which would help employees see Kaizen as less of an obligation. Subject H and AA also agree that the current form should be simplified and reformulated. Subject I even added that we need to be aware of the “kaizens to the Kaizen “

Subject G and Subject N mentioned the importance of creating different criteria for productive and administrative areas, ensuring a fair assessment of initiatives, Subject N also adds that what we still need to improve is accept that we have problems all the time and measure them. Other participants, such as Subject B and Subject A, suggested introducing more detailed feedback and public recognition of best practices to reinforce the feeling of usefulness and belonging.

Subject C suggested the company should value most those who contribute to the profit side, those whose kaizens bring more financial gain. A financial impact-based evaluation system, distinguishing between Kaizens with higher and lower returns, and encouraging quality over quantity.

Subject E and Subject K proposed greater interdepartmental sharing of best practices, allowing examples of success in certain areas to serve as a reference for other teams, and Subject L thinks Happybus should learn mindset and implementation variants from other companies from the same Group. She also adds that the Kaizen department should be more open to improvement ideas.



## **5. Results**

In this chapter the results of the interviews taken from Happybus participants were critically analyzed, while also looking at the literature and the case studies from the literature review. The focus was on the dynamics of the implementation of Kaizen in a SME environment, such as Happybus, the mismatch between means of evaluation and the administrative tasks, the motivation, the leadership, and the culture aspects.

The discussion focuses on five main points: involvement and understanding of Kaizen, benefits perceived, challenges, culture and leadership, and implications for the Kaizen system. The limitations of the study, practical implications, and suggestions for future research will also be addressed.

### **5.1 Involvement & Understanding of Kaizen: Acceptance vs Real Engagement**

The answers revealed a high acceptance of Kaizen in Happybus, however the practical involvement shows variations, most of the interviewees reported medium and forced participation, with the peak of participation being reported in the Kaizen department and near high engaging pivots. This dissociation of theoretical engagement versus practical is common in organizations where the implementation mechanisms are not totally aligned with the nature of the work (Brunet & New, 2003; Bessant & Caffyn, 1997).

In this case, the dissociation came from having metrics for Kaizen that are more easily applied to production work, as its easier for production workers to make kaizens with security improvements or reducing of costs. For the administrative context the impact is different, as the improvements to be made there are more qualitative and cumulative, and that same dissociation is more

visible because of the means of evaluation according to most workers. The reality is that the perceived acceptance might exist due to the practice of submitting X kaizens per year, making the process of Kaizen in Happybus a requisite for evaluation and less of an operational proactive habit.

## **5.2 Perceived Benefits: Real organizational gains & Administrative relevance**

The existence of benefits is unquestionable, all subjects referred improvements in organization, with administrative 5S Kaizen initiatives, more efficiency of process, communication and reducing of all types of waste, such as cost and time to other tasks, even improvements that help future workers jobs. These results matched the literature, as (Suárez-Barraza & Ramis-Pujol, 2010) advocates that there are positive effects of Kaizen in service and administrative support tasks when there is a slight standardization, with simple organized rules, and also a better management of the visual impact, making those small changing visible with boards and codes for example.

However, two tensions arise, the production vs administrative perceived value and the Recognition and Feedback. Both find their literature justification on (Hines & Rich, 1997), when they refer that the impact of continuous improvement in productive environments are easier to identify. Regarding the first problem, almost all interviewees pointed out that “in production everything is Kaizen “, whereas in office improvements look smaller and less valued.

Regarding feedback, employees gave positive remarks, suggesting the motivation it gives with the system of gold/silver/bronze prizes each month, however, this system still favors production area kaizens, due to direct reducing of costs or security, and the literature is clear in this case, what is measured and recognized is linked with behavior, and when the metric does not show the real impact of a group of people, such as administrative workers efforts, the

motivation is affected. It also doesn't measure that extrinsic rewards can reduce intrinsic motivation (Deci, Koestner & Ryan, 1999; Bhasin, 2012).

## 5.3 Challenges & Resistance

The interviewees described resistance as a systemic problem, referring, for example, the bureaucracy and the submission process not being well applied, with forms mainly applied to suit production kaizens, and having to take so much time and steps to submit a simple improvement idea, it demotivates employees and the spontaneity of submitting a simple Kaizen. The objective of 2 kaizens per years is another challenge, even though it creates a stable flow of participation, it disrupts the real motivation, changing from intrinsic to extrinsic.

The perception of unfairness, for example when an administrative Kaizen with cybersecurity improvements is not valued, reducing the quality of kaizens in the long term, as those same employees will not feel engaged to participate for the same result. Literature points that criteria not well designed undermines the legitimacy of the system (Liker, J. K. 2004).

Another challenge related to the feeling of “not having time for Kaizen “, which many subjects indicated. That reflects not only the operational overload (muri), but also shows that Kaizen is not well integrated into the everyday of workers in Happybus. The case study of homebuilding in USA (Nahmens et al, 2012) shows how productive can be to integrate Kaizen in the work rhythm, to overcome inertia.

At last, and taking Subject C’s point, one challenge resided on not evaluating the real impact of a Kaizen that was submitted, following the impact and success it had or not, making it just a submission work, and not a real impact concern, the “Check & act “

Overall, the interviewees described all these problems as systemic, a problem of the way Kaizen is implemented in Happybus, or even motivational, because of that flawed system, but not a lack of attitude, showcasing that what needs to be done is reform the system.

## 5.4 Culture, Leadership & Motivation

From the feedback gathered, culture in Happybus can be assumed as Kaizen friendly, due to factors as affiliation with Toyota, the improvement identity, the number of Kaizens submitted increasing year by year, and that helps Kaizen methodology to last and solidify, however, routines are only created when, for example, leadership gives the example, which many employees criticized, there is time created for Kaizen, and the feedback is useful, as the proponent of an idea sees the improvement go through and its results.

All these three characteristics are subject to critics from those interviewed, and the literature also confirms that guiding leadership and non-monetary rewards, such as visibility, autonomy or career progression, create sustained support for Kaizen (Bessant & Caffyn, 1997; Doberanzke, 2020).

Regarding Culture, some interviewees referred a Portuguese custom practice of prioritizing the short-term goals and methods, which does not suit the Japanese Kaizen, associated with processual patience

The case studies can be used as examples:

**EUA (homebuilding):** The initial resistance was overcome with workshops, which gave the employees the sense of purpose, and helped them verify the impact of their ideas (Nahmens et al , 2012)

**Health Center (AIR, 2012):** This case gives an insight of what Happybus employees fear the process might fall into, lack of leadership, lack of clarity in the process, lack of a purpose, as employees fail to see the results of their effort, and Kaizen just as an extra task

**(Suárez-Barraza & Ramis-Pujol, 2010):** Here is an example for Happybus to follow, a company that succeeded in transforming the previous Kaizen process, drowned in bureaucracy and production focus, to an office adapted case, with protocols, metrics and adapted language, a case study to follow up to, as the interviews show a collective request for that adaptation.

**(Doberanzke V, 2020):** German SMEs show that Kaizen culture is well implemented and works when the leadership is present and acts as an example, and the whole process is done collectively. On the contrary, when communication is top down and the work imposed, the participation and motivation tends to drop.

**(Amorim & Pires, 2015):** This case shows how an informal structure, seniority and overly theoretical training can slow down the Kaizen process. The lack of planning and useful routines, and misalignment of the discourse and the real work can degrade the legitimacy of the implementation.

Happybus has strong symbols, but criteria and instruments not adapted to the indirect (office Kaizen), a leadership with mixed views and bureaucratic feedback, and is at risk of having a Kaizen process just to fulfill the quotas, and not to promote real change and learning.

## 5.5 Implications for the Design of the Kaizen System

The analysis of the results, together with the literature cited, shows the mechanisms responsible for the support and efficiency of Kaizen, such as submission process, time dedicated to Kaizen, leadership and the PDCA (plan do check act, which translates the previously referred idea of following the results and the implementation). In this subsection structural changes are proposed to answer to the issues identified. The proposal is a result of analytical generalization, and evidence recovered from the Happybus case and Kaizen implementation in previous studies.

The findings sustain five design implications:

### 1. **Evaluation Criteria (production vs. administrative).**

Interviewees describe unfairness in points given for administrative kaizens, as opposed to the ones submitted by the production, and literature affirms metrics not well calibrated undermine legitimacy (Hines & Rich, 1997; Liker, 2004).

A fundamental change to implement should be two evaluation grids, one for production, valuing quality, security, and direct financial impact, and one for administrative kaizens, with focus on reduction of errors, lead-time, 5S improvements.

### 2. **Bureaucracy of Submission Process**

Evidence from interviews show the bureaucracy of the forms of submission demotivates proposals for improvement. The suggestion here would be to replace the forms used at this moment, make a 60-90 second

audio pitch of the idea, and after approval an expanded sheet with dynamic fields for each area of work would be designed, increasing the throughput of ideas.

### 3. **PDCA with result follow up**

Evidence from subjects tells us there is not enough analysis of the impact a Kaizen has brought, making the process ritual (American Institutes for Research report (2012); Liker, 2004). The solution is to make sure each Kaizen approved has a metric of impact, and a revision scheduled for 30 to 60 days, and if it was successful, replicate it, if not make the adjustment.

### 4. **Time reserved for Kaizen.**

All subjects described having no time for kaizens in their work schedule, and literature show that small workshops create a habit and make the employees see it as less of an obligation (Nahmens et al, 2012; Doberanzke, 2020). The design suggestion here would be to implement Kaizen time each week, 30 to 45 minutes for each team, with the pivot and a visual board with ideas

### 5. **Recognition and skills development**

The recognition Happybus shows is good, but short for the administrative efforts, which are hard to value, that's why special prizes should be awarded for those office kaizens, for example top 5 admin per month, or micro valuations and prizes.

## 5.6 **Limitations**

1. **Sample:** Even though case studies are shown and analyzed, which makes the study diverse, the main case interviews in Happybus focus mainly in

administrative areas in the commercial department, which can be one sided and not susceptible to generalization.

2. **Method & Source:** Making only interviews makes the study only based on perceptions, not empirical source like KPI's. People also might feel the pressure to give politically correct answers.
3. **Position of the investigator: insider** (Kaizen pivot) — He has the advantage of having access, but can have the risk of promoting bias of confirmation during the interviews.
4. **The fact that Happybus is not a SME:** All the investigation is around SMEs, and you might ask why Happybus when they employ more than the number of people to be called a SME, the truth is that everyone who works there knows that the way of working is from a small company, the way everyone does things is a SME, the context of the interviews, the relationships, the submission process, Happybus is a SME without the name.
5. **Interview type:** 13 of the 15 interviews were made with proper recording and transcribing, however, 2 of them were written, which takes away the spontaneity intended
6. **Literature sources:** a clear limitation was not being able to fully access to some literature intended, for example Hirano 1995, which was mentioned without being cited, or Shingo, S. 1989, whose work on standardization would be useful, but was not available. Also, the authors cited are more from old texts than new, which can neglect new perspectives on Kaizen, but at the same time is truthful to the history of Kaizen.

## **5.7 Recommendations for Future Investigation**

For future investigations, a more in-depth study can be conducted, with different indicators, analyzing effective kaizens and its implications, perhaps with other SMEs, and different methods, questionnaires for example, and the use of real data, such as improvement diaries and data from the company itself. In short, a more empiric study can be conducted, with more time and resources.



## 6. Conclusion

This dissertation tried to answer the question “What are the main cultural and organizational barriers to Kaizen implementation in SMEs?”. Based on the 15 interviews made, the literature analyzed, and the case studies displayed, the conclusion is that the main barriers observed are not a resistance to Kaizen as a concept, nor so much a cultural issue, as it is accepted by most, but a system issue, with a focus on the submission process, the criteria and the lack of completion of the PDCA cycle. In Happybus, all these factors show flaws, which makes Kaizen to be perceived as a formal requirement. The cultural factor is present, with some testimonies perceiving a lack of consonance between Portuguese and the Kaizen culture, nonetheless, were not proved to be the decisive factor.

To conclude, the main contribution this dissertation can highlight, is expose that resistance, and those organizational and cultural barriers can be overcome by fixing the system, on the context in which is being applied, the resistance is not so much in the people, but in the metrics, the routines, the lack of time. The truth is, all employees wish to improve, but sometimes for that to exist the system needs to be reformed.



# Appendices

## Appendix A – Interview Script

### Interview Script

#### 1. General information (1-2 minutes)

- a. Name
- b. Department/Work Area
- c. Years at the Company
- d. Position

#### 2. Understanding and experience with Kaizen (4-5 minutes)

- a. How would you describe your understanding of what Kaizen is? Would you say your involvement with Kaizen is high/medium/low?
- b. When was the first time you came into contact with Kaizen at Happybus?
- c. How involved have you been in Kaizen projects?
- d. Can you give an example of a Kaizen initiative you have participated in? And what was the most productive Kaizen you submitted?

#### 3. Benefits (4-5 minutes)

- a. In your opinion, what were the greatest benefits that Kaizen brought to Happybus?
- b. Have you noticed any long-term changes that the company or your department has undergone based on Kaizen?
- c. Is the application of Kaizen useful in an office context? Or should it only be applied to production?

#### **4. Challenges (4-5 minutes)**

- a. In your opinion, what were, and continue to be, the biggest challenges to implementing Kaizen at Happybus?
- b. Is the implementation of Kaizen more accepted in a production context than in an administrative context? If so, why?
- c. Have you ever resisted or seen colleagues resist any Kaizen initiatives? What were the reasons?
- d. Do you feel that the Kaizen philosophy is well promoted by the company?

#### **5. Culture, Motivation and leadership (4-5 minutes)**

- a. Do you feel that the company's leadership believes in and values Kaizen practices?
- b. Do you feel that employees are motivated to participate and submit Kaizens? Or is it seen as an obligation?
- c. How does the company culture affect the way Kaizen is implemented? Do you think Kaizen could be even better integrated into the culture? How?
- d. What role do recognition and feedback play in promoting and motivating people to submit Kaizens?

#### **6. Suggestions for the future (2-3 minutes)**

- a. What else could be done to improve the Kaizen process at Happybus?
- b. What could help employees see Kaizen as an

opportunity rather than a requirement?

## Appendix B – Interview 1 Transcript

08/2025

Interviewee: Subject A

**AA** Tell me your name, what you do, department, How long have you been with the company? Your role?

**SI** Hello, subject A, I work in Marketing at Happybus.

**SI** I joined at the beginning of 2022, and I'm responsible for some of the company's projects, particularly in the commercial area.

**AA** And how involved are you with Kaizen: high, low, medium?

**SI** Medium-low

**AA** How would you describe your understanding of what Kaizen is?

**SI** The company has a certain culture with Kaizen, that is, it is something that is passed on and understood, but it always ends up being more in the engineering or production areas. In the Marketing area, there is not as much focus on it.

**SI** Kaizen comes from continuous improvement and the ability to improve day by day, task by task, always keeping an eye on where we can improve and where we can optimize things.

**AA** And what was your first contact with Kaizen in this company? Do you have any idea?

**SI** I think it must have been right at the beginning, when they explained a little about the company's philosophy to us, they said right away that we had to always be on the lookout for possible improvements.

**AA** Do you remember your first Kaizen?

**SI** I think it was something related to a database on competitors. Basically, we created an Excel spreadsheet where we gathered all the technical specifications of our competitors' buses.

**AA** How involved are you, really, in Kaizen activities?

**SI** At the company, there is what we could almost call an obligation to present some Kaizens. Every year, we always must meet our goals, but our goal is not very ambitious.

**AA** Interesting. So would you say that you're not particularly attached to Kaizen, but rather attached to it from the point of view of what you have to do? Basically, every year you have to do one Kaizen or another.

**SI** Yes because the improvements end up being a little difficult to explain.

**SI** And then the model itself, how the Kaizen model is created in the company and in those daily Kaizens, is not at all designed for back-office or commercial operations.

**AA** Would you say you are forced to do unproductive Kaizens?

**SI** Yes, because sometimes we end up having to do Kaizens that are not really that important for my day-to-day work, just to comply with the requirements that the company defines in those Kaizens.

**AA** What was the most productive Kaizen you submitted? Do you have any idea? Would you say the first one was the most productive?

**SI** No, maybe two years ago I submitted one for a fair show where we significantly reduced the number of catalogs and flyers to take to the show. I created a scan, people could scan it using a QR code.

**SI** It was good for the company to save some money, and even the customers really liked it.

**AA** Let's move on to the benefits. From your perspective, what do you think are the most visible benefits that Kaizen has brought to your area of work? It's that, the

**SI** The philosophy is good, and I understand its origin and value, but in day-to-day life it depends a little, it's not so easy to see. Then in day-to-day life, in my specific role, I have more doubts.

**AA** Okay. Have you noticed any long-term changes since you started working with Kaizen? Basically, the question is, in terms of long-term change, since you started working with Kaizen, do you feel that anything has improved, that it has been productive for you?

**SI** No, because I don't feel that there is so much pressure from our department managers for us to have Kaizen so present. It seems that Kaizen is always more of an obligation than something that is really useful.

**AA** Okay, how do you think Kaizen has contributed to improving the company overall? But ultimately, the answer is pretty much the same, isn't it?

**SI** Yes, and just to add, in production it can be really interesting and have a more practical effect. In more commercial support areas, which we are more familiar with, it ends up not being so visible and is sometimes seen more as an obligation to comply with indicators than as something that is really important for our day-to-day work.

**AA** You're getting to my next question, whether you thought Kaizen was useful in an office context or whether it should only be applied to production.

**SI** Yes, that's right, there's no logic in what we do. Being here just to say that we comply, that we implement Kaizen, is strange.

**AA** Does it go against the Kaizen philosophy itself?

**SI** That's right, I think it's completely the opposite of what was supposed to be done.

**AA** In your opinion, what do you think are the biggest difficulties or challenges in terms of implementing Kaizen in this area? Do you think there is cultural resistance? Is it people's motivation?

**SI** Maybe, yes. If it were in production, it would be different, but here I feel it's motivation and not seeing practical things happen.

**AA** Do you think it's because there's no reward? Do you think it's more a question of mentality?

**SI** Yes, the reward also has another aspect, which is that sometimes people are focused on the reward, so they do everything for nothing. Things that sometimes aren't even worth it. Then there was a man who had 200 Kaizen in a year, something like that.

**AA** Yeah, sometimes, maybe, each Kaizen isn't very relevant in that case.

**AA** Then, as we've already discussed, you felt that Kaizen was more accepted in production. Why do you think that was? You think it's because it's more practical?

**SI** That's right, people see the improvement right away if it's there, but in the office it's more difficult. In other words, the more visible it is, the easier it is for people to adopt it.

**AA** But do you think that the way we do Kaizen, specifically from the point of view of the form, is very production-oriented, and that's why it doesn't motivate us either?

**SI** Yes, I think that's true too. It becomes difficult for us to implement Kaizen and meet those criteria. Or else, when we do, it seems like it's nothing special, and sometimes they are good things, but because of that form, they are devalued.

**AA** Okay. Another question. Have you or any of your colleagues ever resisted Kaizen initiatives? Why?

**SI** Yes, sometimes. There are those Kaizens, when people tried to move something to the cloud. There is a lot of resistance when new technologies are introduced.

**AA** You think one of the main reasons has to do with the fact that sometimes some people who work at the company are older and are more resistant to certain changes in terms of implementation?

**SI** Yes, that's right, for some people, things on SharePoint are always a big deal.

**AA** And do you feel that this also extends Kaizen a little bit?

**SI** It extends when you try to make improvements to that. Many of the improvements that are sometimes possible, for example, in the office, are to make things more digital, things in the cloud, to work at the same time. To save time and optimize, basically.

**AA** Do you feel that our department is particularly resistant to Kaizen? Or do you feel that there are departments that are worse than us? How do you analyze that in tangible terms?

**SI** I can't really say, because I don't know the reality of other departments very well, but I would say yes, there is resistance in our department.

**AA** Okay. And do you feel that Kaizen is well communicated, in terms of the company, is it well promoted? Or could we improve in that regard?

**SI** In terms of the company, I think so, they hold various events. They give out awards. It always ends up being related to production, but yes... In production, it is well promoted. Now, for other areas, I think it's more difficult.

**AA** Okay. Let's move on to another part, another section, which has to do with culture, motivation, and leadership. Do you feel that the company's leadership supports and agrees with Kaizen values and practices?

**SI** It's one thing when you describe the company's mission statement, vision, values, they always bring up those things, but in everyday life it's always difficult. And the strategic part of the company is always complicated. So, I think they try, but in reality you don't see it.

**AA** This question is a little more ambiguous, but how do you think the company's culture affects the way Kaizen is implemented? Do you think that our culture, sometimes, in some areas, or in some way, can influence the way we apply Kaizen, compared to other contexts?

**SI** That's right, I think that's about it, the fact that the company is as critical as it is, when it has been performing poorly for so many years, it makes everything complicated, namely, these Kaizen tasks could be important to help the company.

**AA** But what role do you think feedback and, ultimately, recognition play in terms of continuous improvement? Do you think that if there were more feedback, perhaps a little more recognition in terms of what we do, the effort we make to implement Kaizen, do you think we would have better results in terms of continuous improvement? What do you think about that?

**SI** Yes, perhaps that is one of the solutions for us to improve here on a daily basis. or perhaps we need to be revolutionary, to reformulate everything.

**AA** Suggestions and a future analysis, what do you think could be improved in terms of how we apply Kaizen? What do you think could be improved?

**SI** I think that we should stop being so focused on production and create different forms for support areas, back-office areas, which are also areas where Kaizens can be important, and we may need to break something and do things differently to adapt to the reality and work of each person.

**AA** How do you think we can better integrate Kaizen into the company culture?

**SI** Well, I think that perhaps the company culture would have to change to integrate Kaizen. I also think that's more likely. In practice, the culture is not so

supportive of Kaizen. In theory, it is, but in everyday practice, it doesn't work so well.

**AA** How do you think we can start seeing Kaizen as an opportunity and not, ultimately, an obligation? How do you think we can change that?

**SI** I think we need to, going back a little bit to the culture part, I think it becomes a cultural thing, and we, our own directors, almost encourage doing Kaizens that are not very useful, just to meet the objectives. That's why I think it's a problem when there's that reward or there are objectives, because it ends up distorting the essence a little bit.

**AA** Okay. One final note. Is there anything you want to share in terms of your experience with Kaizen?

**SI** I think Kaizen is important, but, at least in my view, it comes largely from the company's culture and what it wants to convey, because that's what it conveys on a daily basis. I think that's really important. And then if things are bad in terms of culture, in terms of day-to-day actions, obviously all those actions fall on deaf ears.

## Appendix C – Interview 2 Transcript

08/2025

Interviewee: subject B

**AA** So, let's start with your name, the department you work in, how many years you have been with the company, and your role.

**SI** My name is subject B. I am currently the a director at HappyBus. I have been with the company for seven years. I started in after-sales, then moved to sales as a technical sales representative, and now I am a director.

**AA** And how involved are you with Kaizen? Would you say highly, moderately, or low?

**SI** I would say high, because it is company policy for everyone to do Kaizen, for all departments to be involved and to develop Kaizen throughout the year. As department director and team leader, I also have to motivate and develop this Kaizen development, the implementation of Kaizen, and the launch of Kaizen with annual and monthly metrics.

**AA** Regarding the understanding of what Kaizen is, would you say that you understand it well in terms of philosophy and the very idea of waste reduction? Is there a general understanding?

**SI** Yes, before joining the company, I was also at a Japanese company, Asaki, and they had a more ingrained methodology than at Happybus, so for, I don't know, 10 or 11 years now, Kaizen has been part of my daily professional life, so I am very familiar with the methodology.

**AA** And when was your first contact with Kaizen at this company? Do you remember?

**SI** At Happybus, I don't remember, but I've had a gold Kaizen. I think that was the involvement or Kaizen that had the most impact on the company, receiving the gold Kaizen, while still as a technical salesperson.

**AA** So it would be the most productive Kaizen submitted, right?

**SI** Exactly.

**AA** In terms of benefits, what would you say were the most visible benefits that Kaizen brought to the company, or to your department?

**SI** Well, in terms of indirect (office kaizens), in the area where we work with indirect production costs, sometimes the impact is not so significant, whereas in terms of production, any reduction in a process automatically leads to a more direct reduction in hours and costs. In terms of indirect costs, it is sometimes more complicated. But in terms of lower implementation costs, customer satisfaction, team involvement, and motivation, yes, Kaizens help us in those areas.

**AA** Those would basically be long-term changes, right? My second question would be whether, in terms of perception, there were long-term changes that Kaizen brought to the company, right? More in that sense.

**SI** Yes, in terms of indirect costs, sometimes it's the processes we have between departments.

When we manage to improve something, we have a direct impact on our day-to-day work, on the tasks we have every day, and that makes all the difference. Not only in terms of the time saved in the task to which Kaizen is applied, but also,

perhaps, in terms of team motivation, because the tasks are either easier or more automatic, and that also helps to maintain team morale.

**AA** Regarding this issue of production, would Subject B say that Kaizen in an office context is useful, or should it only be applied to production in this case?

**SI** No, it is also useful in an office environment.

**SI** What I meant to say is that sometimes it is difficult to find Kaizen to apply and sometimes it does not have as much impact, but yes, it is useful, without a doubt it is useful.

**AA** Okay. Regarding resistance, because basically the scope of the dissertation has to do with resistance. What would Subject B say were the greatest difficulties in implementing Kaizen, in this case, in the company? What are the biggest challenges?

**SI** At the company level, I wouldn't say there is much difficulty, because these are guidelines that come from above and there is motivation for this. For example, there is a monthly report, and there are also annual awards for those who contribute the most Kaizens and those who do the best Kaizen. In other words, at the corporate level, there is a lot of incentive and many actions to develop this, and people actually launch Kaizens, and employees are given time to do so.

I think the resistance is more at a cultural level, that is, we Portuguese don't have this ingrained in us. I have worked at another company that was of Japanese origin, and this was something that was ingrained there, even though they weren't Japanese. The company's own culture had existed for many years and this had developed over time. Here at Happybus, there is a willingness to do this, but I think the resistance comes more from the people.

**AA** So Subject B would tell me, for example, that someone who has been working for more years or who is older will sometimes find it more difficult to adapt to a certain change for continuous improvement? Subject B has never felt that any colleague has resisted Kaizen initiatives?

**SI** Yes, I have. I have because people are not always willing to leave their comfort zone or even to communicate that there is a particular difficulty in a particular process or in a particular department or in a particular task, and they don't want to develop because they are not available. But the company culture motivates and ensures that this does not happen.

**AA** Okay, so Subject B would say that the company culture affects how Kaizen is implemented.

**SI** Oh, definitely.

**AA** Okay, going back to this a little bit, Subject B would say that, okay, Kaizen in an office context makes sense and is useful, but Subject B would say that it is more accepted in a production context than in an office context, in our case. Is there a reason for that?

**SI** Yes, it's more accepted at the production level because at the production level there are more mechanical and repetitive tasks, and any impact on these tasks immediately means a huge cost reduction or a much shorter takt time for a given workstation. Multiply that by the number of units produced, in terms of costs, and at the end of the year or the end of the month you have a very substantial gain.

**SI** In other words, replacing a part or a special or specific tool for that task, whether for safety or production reasons, has a much greater and more visible impact.

**AA** Subject B, do you feel that Kaizen, in our context, is well communicated and well promoted by the company?

**SI** I would say yes, each department even has a Kaizen pivot, that is, someone who motivates, who pushes their colleagues, who pushes the team to develop Kaizen, who facilitates that conversation, that dialogue, so to speak.

So, just the fact that each department has a Kaizen reference person, I think that makes all the difference. So yes, the company promotes this a lot.

**AA** In terms of culture and motivation, Subject B, do you feel, for example, that the company's leadership, our leaders, support and keep this in mind, and in terms of the Kaizen context, is this something you feel?

**SI** Yes, yes.

**AA** Can there be other priorities at times, at certain moments?

**SI** Yes, naturally there are times when what has the most impact on the business, and we in the commercial area work with deadlines set by customers in terms of tenders that are not reversible, that is, there is no possibility here of delaying the submission of a tender, it is second by second. Naturally, this is a priority, but Kaizen is something that we have to develop on a daily basis, we have to keep thinking about it, and it may not be at the top of the list of priorities, but it is undoubtedly a priority for top management, right from the top, from administrators to team leaders.

**AA** Another question here, also related to motivation, Subject B, do you think people feel motivated to participate, or do they sometimes see it a little more as an obligation, at certain times a matter of having to fill out the Kaizens, having to do X Kaizens, right?

**SI** I think people feel motivated to do Kaizen, because it helps us, or forces us to think about how to improve a task that can have a direct impact on our daily lives. And I think we all want to work, I wouldn't say less and better, but at least better or as easily as possible. And if Kaizen allows us to do that, if this Kaizen methodology allows us to do that, I think everyone is motivated to develop Kaizens.

**AA** Regarding the role of feedback and recognition in Kaizens, it is well developed in terms of Kaizen submission, recognition, and awards. This is something that works and makes sense, that motivates. What do you think about that, Subject B?

**SI** I think so, that here in this company the awards are adequate and are quite motivating for everyone to develop, or at least try to win or create a relevant Kaizen. I think it is in line with reality and with everyone's expectations.

**AA** Moving on to the final part, suggestions for the future, what would Subject B say could be improved in terms of Kaizen at Happybus?

**SI** I would say that the bureaucratic part always ends up being more demotivating, and also sometimes the way those who receive or validate the Kaizen are not always familiar with the process and do not understand it, so sometimes they can raise questions that do not always make sense. I think there should be greater involvement on the part of the person who validates the Kaizens in action. Effectively understanding and accepting when a simpler Kaizen is implemented and not complicating the Kaizen record so much. I think that could be something that could be improved.

**AA** Would that also be a way to sometimes better integrate Kaizen into the company culture? Or would Subject B say that Kaizen is already fully integrated

into the company culture at this point and is not even an issue, nor does it need improvement in this case?

**SI** I think improvement is needed. It is also one of the objectives, one of the philosophies of Kaizen. There is always room for improvement, so I couldn't say otherwise in this context. Now, intrinsically, what could be improved is a bit difficult because I am not involved in the entire Kaizen process, from start to finish.

But I think that the groups, limiting groups to four people, I think that's something that doesn't make much sense. It should be more comprehensive, because there are tasks or ideas that are developed among more than four people, and that sometimes limits the motivation of all employees, of all people, to participate.

**AA** Okay, and if that improvement could also be beneficial, for example, to make some people see Kaizen more as an opportunity, as a requirement, in a sense, right?

**SI** Yes, and I think it would bring more people into the discussion. Sometimes, imagine two or three people have an idea, they bring in one more person because they think they might help with the process, but if they opened it up to more people, the idea could be even better, the result could be better, at least the brainstorming part where you define how it can be implemented or improved. If there were a wider range of colleagues, I think there could be more and better ideas, probably.

**AA** Okay, on a final note, is there anything else Subject B would like to share about the Kaizen experience at this company? Or have you already shared everything we had to share? This is just a final note.

**SI** The experience is good at the company, but I think the metrics are demanding. I think we've reached a certain point where things are starting to stabilize, but from year to year, Kaizen's numbers in terms of implementation are increasing, and I think it's difficult to keep up that pace. Instead of thinking about implementing quality Kaizens, we start implementing Kaizens just for the sake of implementing them, I think that's a bit contradictory and doesn't make much sense.

**SI** Or, in the case of implementing a new part of the business, create some KPIs or metrics for that business area with a higher number of Kaizens. It's a new business opportunity, a new business area, new processes, new procedures, and there's more room for implementing Kaizens.

Whereas in other areas that already have them, unlike the company that will be 80 years old next year, there are things where we reach a certain limit and can't come up with much more. So I think there should be a division of metrics by business areas within the company.

**AA** Thank you, Subject B.

## Appendix D – Interview 3 Transcript

08/2025

Interviewee: Subject C

**AA** Okay, so it's recording. So, to start, tell me your name, the department where you work,

**SI** Yeah, my name is Subject C.

**SI** What is my department? I'm working directly with the administration. I don't know what's my department name, but I'm, let's say, a little bit apart from SAC, but you can say it's SAC.

I'm a business development manager in Happybus.

**AA** Okay, how many years have you been in the company?

**SI** It's 1.4 years.

**AA** So, and what's your involvement with Kaizen? Is it high, medium, low? What do you say about that?

**SI** I don't say too high. Maybe it will be medium. Yeah.

**AA** About experience with Kaizen, how would you describe your understanding of what Kaizen is? You know, as a Japanese, you maybe have like a deeper connection, you know, how would you describe your understanding of what Kaizen is? Do you, you are connected to it? You know what Kaizen is?

**SI** Yes, maybe I really understand about Kaizen, but maybe I have some discrepancy between the understanding about Kaizen in Happybus and Kaizen in Japanese, because Kaizen in Japanese is like a, let's say, simply we call it improvement, and improvement is like, okay, we can say in our daily business, we have a lot of improvement points that we can do it. And we usually do Kaizen in Japan by, we call it like a PDCA. We don't just propose a Kaizen, but we carefully check whether this Kaizen is improving the challenges.

**AA** When did you first come in contact with Kaizen in Happybus? Do you remember?

**SI** July last year.

**AA** Okay. And recently, how involved have you been in Kaizen-related topics? Were you involved in many Kaizens? How was your experience until now?

**SI** Yes, actually, last year my Kaizen was only with me. I mean, I was doing some Kaizens in the Olympic project and communication with CRRC. So it's more or less a little bit independent from the productions and sales activities that usually a SAC member is doing.

**AA** Okay, so that's the one you were talking about is an example of a Kaizen you participated in. I had like a question about that, about Kaizen you participated, one example of one Kaizen you did, That was one, the one you were talking about?

**SI** Yes, exactly. It's the example that I had made last year.

**AA** Okay, okay, that's good. And that was also the most productive Kaizen you submitted or there was another one? What would you say?

**SI** Well, what I received abroad last year was about the CRC business trip manual. So maybe this was the one of the Kaizen that I made last year. More, let's say, more impacted Kaizen that made the last year.

**AA** About the perceived benefits of Kaizen, what should you say from your perspective? What are the most visible benefits that Kaizen brought to the company where you work? What would you say? What were the most benefits you saw?

**SI** Well, I'm not sure about the impact of Kaizen, but what I think most benefit is, okay, everyone is looking for the Kaizen due to this activity, because if the person working in this company is not looking for Kaizen, we will probably overlook many improvements. But, okay, this company is doing Kaizen activities all around the company, which I think everyone is looking for the improvement, which is the real benefit of this activity.

**AA** Have you noticed any long-term changes since Kaizen was introduced, since you are here, basically?

**SI**, It's only been a year that, let's say, I have joined, so I cannot notice what's the, let's say, impact, unfortunately. But I think this will be impacted in this one or two year, because we are now changing whole process with CRRC, right? In that case, yes, this will probably start from scratch, and we have to do many Kaizens, I think it will generate a huge impact in one or two years.

**AA** Do you think Kaizen in the office context is useful, or it should only be applied to the production? What was your experience? What do you think?

**SI** Well, towards that question, I think it don't need to be only on the production side.

**AA** Okay, you think it could be adapted, you know, in terms of the way we do it, in terms of the form, for example? You think it's... The way we should do it is different in production and office. Do you think that's the way?

**SI** Yeah, I think so, because as a company, we have to maximize the profits of the company.

And if our profit is not only focused, generated from the production, if we can, as a team, not only for the production, like after sales, sales, if we can be more efficient, and if we can work quickly and efficiently, the cost will be minimized. So, I think not only for the production, but for the other department, I think it's making some benefits.

**AA** So, going to the resistance, because my thesis is about the certain cultural resistance that some companies have in implementing Kaizen. And my question about this is What are the main challenges in implementing Kaizen that you see? What do you think are the most difficult things when we try to introduce Kaizen?

**SI** Well, I think there's two points. One is, okay, we should not leave Kaizen, i mean, Kaizen should be evaluating the effective, I mean, the impact of the Kaizen, which means, in our company, we are now having some targets of two Kaizens per year, right? But this target is just submitting the proposal, which means, okay, we cannot evaluate how efficient or how the Kaizen have impacted our financials. So, my first point is, okay, Kaizen should not only be on proposing the Kaizen, but we have to evaluate.

**AA** You think it should not be, you know, like an obligation?

**SI** Exactly, exactly. Okay. But, yes, that's my first point. And the second point is, okay, let's say the target of the proposal, number of the proposal might not be efficient, effective, because we can make small Kaizens, but one proposal which

have improved the cost of like 1000 euro, and another one is only affecting 100 euro, this should not be in the same, let's say, criteria, this is my opinion.

**AA** That's interesting. Yeah, my next question is a little bit going back, but still, if you feel that Kaizen is more accepted in production than in office, you know? My question before was if you thought it was useful to use it in the office. Here is more about, do you think it's more accepted in the production because it's more practical, the tasks and the Kaizens, than in the office, you know?

**SI** as I have mentioned, I know there are many, let's say, practical works in production, but there are many practical works also in our office, right? So, if we can improve this one by one, this will impact also quite huge profits. So, my stance is the same. Not only the production, but okay, those kind of points should be also considered. But as I have explained, this should be focused on the profit side, not only for the number of the proposal.

**AA** Okay. Yeah, I understand. Better Kaizens, you know, more productive Kaizens.

**SI** Yes, exactly.

**AA** Have you or your colleagues ever resisted Kaizen initiatives? Have you seen someone resist to submit a Kaizen or, you know, say, " oh, I don't have time", you know, have you seen any form of resistance in any way?

**SI** Not really, maybe my communication is not as fluent as everyone. So, maybe this is the reason, but from my perspective, I never have seen some resistance on this activity.

**AA** not from, like, all the employees that are not so amused with the change and the Kaizen philosophy and embracing, you know, that's normally that's one of

the other main points people say, that some employees don't want to learn new ways, you know.

**SI** Yeah, this happens same in Japan. So, I know this. But from my perspective, I have not noticed or seen this kind of resistance at our company at this moment.

**AA** Yeah, our department also is young. So, you know,

**SI** Yeah, maybe that's the reason.

**AA** about the cultural leadership. Do you feel that the leadership supports and values the Kaizen practices? Have you felt the support and the embracing, you know, of the leadership? Of the, you know, your leadership, company leadership, you know, as you deal with different kinds of leaderships?

**AA** it's just, if you feel that, for example, you respond to administration, right? the board, you know, if you think the leadership of the company supports and values the Kaizen practices, you know?

**SI** Ah, good question.

**AA** If they promote it, and if they value and if they support it, you know?

**SI** To be honest, I have not discussed this topic with them, because when I talk with him, it's more or less talking more about, let's say, project issues. So, even though he is my boss, I have not discussed in deep about this kind of Kaizen project. But I think, for sure, he knows about the importance of the Kaizen. But I'm not sure how he's committing and how he's trying to push this activity. This is unclear from my perspective at the moment.

**AA** Okay, okay. Yeah, this question was more, yeah, if employees feel motivated to participate or if it is more like an obligation, you know? You told me that you think it's more like kind of an obligation right now, right?

**SI** Yes, yes, exactly. I think it looks like obligation, but I think it's really important. So, I think we need to evaluate the activities from another perspective, like how much did we save the money,

**AA** this is kind of an abstract question, but do you think the company culture affects the way Kaizen is implemented in any way? I'm gonna try to simplify a little bit. Do you think, for example, if we were more demanding in some ways, if we had like a different way of working, a different culture, do you think Kaizen would be differently implemented? Do you think it's like a correlation?

**SI** Good question. Yes, I think so, Because why I was a little bit thinking is, I think it's not only for the culture of the company, i think it's a situation of the company. For instance, we are changing the business model to CRRC. Due to this, we have a lot of, let's say, urgent tasks to launch this business, right? In that case, we cannot focus on doing Kaizens.

Everyone is focusing on the tomorrow's work, not in the like half, after half year work, which means if this CRRC operation has been stabilized, we can see the Kaizens. But if we can only start the project, we cannot see the Kaizens so much. So my opinion is, okay, I agree that the Kaizen will be affected by the culture of the company, but I think it's more affecting from the situation of the company. This is my personal opinion.

**AA** Okay, that's interesting. Then, what role do you think feedback and recognition play in the way we do Kaizens? Do you think if we were more recognized or if we had a better feedback, do you think it would be more motivating for us to do Kaizens?

**SI** Yes, I think this will be my same opinion. We have to, let's say, see Kaizen a little bit in more longer term, which means, okay, if we just submit feedback, it's really limited, right? But if we implement the Kaizen, and if we evaluate the effectiveness, and if we can explain those kind of activity to, for instance, the management, I think the feedback will be more, let's say, fruitful. So due to this fact, if maybe we can reduce the number of the target, but if we can show quality, more focus on those.

**AA** This question is a little bit also because, for example, we have annual and monthly prizes for Kaizens. So they try to recognize people even monthly for the Kaizens they do, the thing is, I think they do that for most Kaizens, most monthly prize for Kaizens, everything is for production.

**SI** I have one idea for this one, because now our Kaizen is from bottom up, right? But if we can have some like, if our management can put some, let's say, items at which we are struggling inside a company, and if we can make the project team of this kind of items, for instance, okay, we can do it in both ways, bottom up and top down. And if our management is, let's say, sharing everyone about the challenge of the company, and if many people raise their hand to participate in this project, I think those kind of top down Kaizen is also effective. So maybe this both top down and bottom up approach can be one idea.

**AA** Okay. So to finalize, I think you already answered this a little bit, but basically what do you think could be improved in how Kaizen is applied? You know, you already told that we should focus more on value

**AA** this is also a little bit the same, but how do you think Kaizen could be better integrated into the company's culture?

**SI** Yeah, because since we have some like targets on the Kaizen, but if we can like, for instance, if person A contributes to gain the profits of like 1000 euro per

year, maybe we can give some bonus to those kind of Kaizen. I think those kind of real, let's say, bonus or real criteria. If we can give some this kind of, let's say, arrangement, people can be more focused on doing Kaizens on value side.

**AA** You think that will help like employees see Kaizen as an opportunity rather than a requirement?

**SI** Exactly, exactly. I think Kaizen should be like this.

**SI** Maybe, yeah. I know it's not easy for making this kind of criteria, but okay. If person can be more focused on the value side, I think the company, whole company will go to the better way for this Kaizen activity.

**AA** And the final note, is there anything else you'd like to share about your experience with Kaizen in this company?

**SI** Unfortunately, my Kaizen is really still limited in this company. So I don't have, yeah, maybe this year I can try to make a better Kaizen than last year.

## Appendix E – Interview 4 Transcript

08/2025

Interviewee: Subject D

### General information:

- Name: Subject D
- Department/Work Area: Business, Marketing, Sales, Engineering, and After-Sales
- Years at the Company: 5
- Position: Administrator

### Understanding and experience with Kaizen:

1. How would you describe your understanding of what Kaizen is? Would you say your involvement with Kaizen is High/Medium/Low?

SI Medium, but I would like to raise it to High.

2. When was your first contact with Kaizen at Happybus?

SI During onboarding

3. How involved have you been in Kaizen projects?

SI Continuous improvement is a daily necessity for me. I may not formalize it through daily Kaizen, but I seek continuous improvement in my direct activities and promote a Kaizen mindset among the teams.

4. Can you give an example of a Kaizen initiative you have participated in? And what was the most productive Kaizen you submitted?

**SI** Creation of a digital tool for managing urgent and important tasks, assigning priorities and measuring their execution/completion time. Another very common one is the organization of Kaizen-style meetings, with a well-defined agenda, objectives, timings, and next steps.

**Benefits:**

5. In your opinion, what were the greatest benefits that Kaizen brought to Happybus?

**SI** A culture of continuous improvement.

6. Have you noticed any long-term changes that the company or your department has undergone based on Kaizen?

**SI** Yes, both in operations and administrative processes, the impact of small Kaizen ideas is noticeable, with a major impact on team productivity and often on the elimination of unnecessary costs or waste. For example, there are several Kaizens that have challenged obsolete or redundant processes, with an immediate impact on team performance in terms of both productivity and improved relationships between colleagues. There are many cases where employees ask themselves "why do we have to do this if it serves no purpose" and, aware of this, they launch a Kaizen idea that eliminates this frustration and an effectively unnecessary process.

7. Is the application of Kaizen useful in an office context? Or should it only be applied to production?

**SI** It is very important and useful, although often neglected by teams. As I mentioned in my previous answer, there is much room for improvement in office processes, as today's office environment is much more dynamic

and exposed to the need for continuous improvement to ensure that, for example, administrative processes do not become outdated. Another very important issue in the office environment is unproductive meetings, which would be greatly improved if they were scheduled and managed using the Kaizen format, with a well-defined agenda, objectives, and time limits.

### **Challenges:**

8. In your opinion, what were, and continue to be, the biggest challenges to implementing Kaizen at Happybus?

**SI** The mindset of employees to "stop" regularly and question what could be done better. The rush and pressure of everyday life does not help, and people get carried away by this context. Sometimes we have to force ourselves to dedicate even 15 minutes a week to thinking about Kaizen ideas.

9. Is the implementation of Kaizen more accepted in a production context than in an administrative context? If so, why?

**SI** Employees think so, and indeed, production has many areas and opportunities for improvement, but if the office teams reflected more on all the administrative processes and activities we carry out every day, we would have the same wealth of opportunities for improvement.

10. Have you ever resisted or seen colleagues resist a Kaizen initiative? What were the reasons?

**SI** Yes, particularly from those who didn't bother to think about how important Kaizen initiatives are. In my position, I don't let it go and I take the time to talk to my colleague about the importance of changing their

attitude. I also suggest that they read the "Kaizen Talk" emails sent out every week by the quality and continuous improvement team with ideas from other colleagues.

11. Do you feel that the Kaizen philosophy is well promoted by the company?

**SI** Yes, there is a lot of communication on the subject and there are even gifts and prizes for the best Kaizens within the various pillars, in addition to the regular daily Kaizen sessions. Not to mention the Pivot Kaizens that all departments must have and that function as Kaizen ambassadors and promoters within each department.

**Culture, Motivation, and Leadership:**

12. Do you feel that the company's leadership believes in and values Kaizen practices?

**SI** Yes, absolutely. We even hold annual ceremonies to recognize dozens of Kaizens, attended and judged by the company's management, where high-value prizes are awarded. This also happens at the Group level, where there is competition between Group companies for the best Kaizens.

13. Do you feel that employees are motivated to participate and submit Kaizens? Or is it seen as an obligation?

**SI** I believe that today there is a natural motivation, but it needs to be nurtured and recognized regularly by management.

14. How does the company culture affect the way Kaizen is implemented? Do you think Kaizen could be even better integrated into the culture? How?

**SI** It is always possible to do better, but I believe that in this field, the necessary energy is well directed. Eventually, we will reinforce the importance and promotion of Kaizens in the office environment.

15. What is the role of recognition and feedback in promoting and motivating people to submit Kaizens?

**SI** It is extremely important, which is why our company promotes presentation sessions, feedback, and even awards prizes for the best Kaizens.

**Suggestions for the future:**

16. What else could be done to improve the Kaizen process at Happybus?

**SI** Digitize the process of submitting daily Kaizens. Currently, Excel files are circulated by email. There should be a user-friendly platform with an integrated validation workflow that simplifies the entire process of filling out and formalizing Kaizen ideas.

17. What could help workers see Kaizen as an opportunity rather than a requirement?

**SI** It is essential to create an environment where they feel heard, valued, and involved in the improvement process. We can further emphasize the personal and collective benefits by showing how small improvements can make daily work easier, reduce wasted time or effort, and make tasks more lean. Give autonomy and recognition by allowing each employee to propose and implement ideas, reinforcing the feeling of real contribution and thereby also celebrating progress by valuing both small achievements and larger advances. When employees realize that Kaizen brings tangible improvements for themselves and the team, motivation naturally grows

and change is no longer seen as an imposed requirement, but rather as an opportunity for personal and company growth

## Appendix F – Interview 5 Transcript

08/2025

Interviewee: Subject E

**AA** What is your name? Which department do you work in? How long have you been with the company?

**SI** Subject E, Customer Service Department, Technical Department, and I have been with the company for a year and two months.

**AA** What is your role and how involved are you with Kaizen? Is it low, high, or medium?

**SI** My role is to analyze technical documents for tenders, and I would say that my involvement with Kaizen is medium.

**AA** You're still getting started with Kaizen, aren't you?

**SI** Yes.

**AA** How would you describe your understanding of what Kaizen is?

**SI** Kaizen, in my opinion, is improvement, continuous improvement throughout the company. Anything that is proposed in terms of improvement is Kaizen.

**AA** When was your first contact with Kaizen in this company? If I'm not mistaken, you're having it now, right? When you just arrived at the department, right?

**SI** Yes, I had others that are still in progress, but they had to be paused, stopped, because of the uprisings. So, after everything that happened, Kaizen was put on standby, but it is about to return now, and it is an important Kaizen.

**AA** But you were in a more practical area, right? Yes. And in that area, they didn't make you do Kaizen? They never asked you to do Kaizen?

**SI** No. I always heard about it, a lot, many of my colleagues from other teams talked about it. But no one ever gave me the initial trigger and never encouraged me to do one.

**AA** Moving on to the benefits. From your perspective, what do you think Kaizen brings to the company? What do you think is the benefit of using Kaizen? What do you think is the most visible benefit?

**SI** I think it's when Kaizen is really proposed and effective, when it's really put into practice, not just a Kaizen that is talked about and then nothing changes. There are some that change and some that remain the same. But I think there needs to be more incentive.

**AA** But what do you think it brings in terms of us doing Kaizen, especially now in the office? Do you think it improves the company's performance?

**SI** Depending on the Kaizen, it greatly improves organization, communication, among other factors that help. I think it only brings benefits.

**AA** Have you ever seen long-term change because of Kaizen? Do you feel that there has been long-term change because of Kaizen?

**SI** No, I haven't seen anything.

**AA** Okay. Do you think Kaizen in an office context is useful, or should it only be adapted to production? Do you think the way Kaizen is currently implemented in the company, from an office perspective, is useful, or do you think it should only be for production?

**SI** I think it makes more sense in production than in offices. But in offices, it's harder to have Kaizen work, I think I can say that. So I think it makes more sense in production.

**AA** Okay. Moving on to the issue of resistance, because ultimately this is an interview about the work I'm doing, and it has to do with the Kaizen philosophy, but especially the issue of resistance, the culture of resistance that exists in certain companies to the introduction of Kaizen.

**AA** What do you think are the biggest challenges to implementing Kaizen in Happybus? Do you think there is resistance because there are older people in the company? Do you think there is a certain resistance? What do you think are the biggest difficulties to implement? Do you think it's people's motivation? What do you think?

**SI** I think that people, beginners who are just starting out and need to do it, need more encouragement, more explanations, more ideas, examples of Kaizens to do in the future. Because in everyday life it is difficult to think about doing Kaizen. I think people take examples from others that have already been done, to get more ideas.

**AA** Do you think the biggest challenge to implementing Kaizen in the company has to do with a certain weariness on the part of people in this case? Do you think people copy because they don't care much about the issue and decide to copy because they think it's almost an obligation?

**SI** Yes, it seems very much like an obligation to meet the Kaizen goal and do something, without thinking about the improvement itself.

**AA** Do you think Kaizen is more accepted in production than in the office? Have you felt that?

**SI** Yes, because it's more visible in production. In the office, for example, it's more of an organizational change, some document, something simpler.

**AA** Yes, more 5S organization

**AA** Have you ever seen, or had a colleague resist Kaizen? Any resistance from the Kaizen point of view, where something was done and the person didn't want to do Kaizen, have you felt that?

**SI** No, on the contrary, I think everyone always wanted to do Kaizen.

**AA** Even in the office context we're in now?

**SI** Whenever there is an idea, something like that, people will do Kaizen, it's Kaizen, it could be Kaizen, people are thinking about it every day.

**AA** But don't you feel that this is a bit, in the sense of fun sometimes, rather than a serious perspective on the issue?

**SI** Yes, because then it just stays in conversation, it's not Kaizen that is actually done afterwards.

**AA** From your perspective, there isn't really resistance, it's more that people don't take it very seriously, in that sense, right?

**SI** Yes, sometimes you get the impression that people don't take it seriously, and that's true.

**AA** Okay, how do you think Kaizen is promoted and communicated by the company? Do you think it is well communicated, well promoted?

**SI** Yes, I think that in the beginning, in terms of training, there is a lack of explanation. Because the training consists of those videos on the online training platform, which don't help or motivate anyone.

**AA** In terms of culture, motivation, and leadership, do you feel that leadership, in the sense of the company, of people like those you lead from a leadership perspective, support and develop Kaizen, Kaizen practices? Do you think there is strong support from leadership for the implementation and development of Kaizen?

**SI** Yes, definitely, leaders always say to do Kaizen, they motivate and give ideas to do together and things like that.

**AA** For example, I already asked you if you thought that the people who participated felt motivated or if it was more like an obligation? You already said that it was a little more like an obligation, in a certain sense?

**SI** Yes, to meet the goal and fulfill what is requested.

**AA** Do you think that the company culture affects the way Kaizen is implemented, in this case at Happybus?

**SI** I think so, because I don't know what Kaizen was like in the past, but it seems that before it was more popular and people were more motivated to do it. Nowadays, it seems like it doesn't matter.

**AA** And following on from that, do you think this lack of motivation has to do with a lack of feedback, recognition sometimes? You may not be recognized for doing Kaizen, sometimes you feel that there is no due recognition for the effort you put in? Do you think that happens?

**SI** No, I don't think so, because I think the benefits of Kaizen there, of having gold, silver, and bronze Kaizen, I think that motivates people to want to do a good Kaizen to compete with the best.

**AA** What do you think could be improved from a Kaizen perspective in the company for the future?

**SI** I think that, better initial training in order to motivate people more and vary the rewards and some ways to motivate people and more ideas in the offices and things like that.

**AA** Do you think changing the way Kaizen submission forms are filled out would help?

**SI** Yes, I think there should be a simpler way to fill out this information, because I think that sometimes it discourages people to have to fill out everything and it's complicated. I think that the easier it is, the more Kaizens there would be.

**AA** Okay. How do you think we can better integrate Kaizen into the company culture? Maybe it also becomes a little repetitive, following on from the question I just asked you, but how do you think we can further integrate this culture of improvement and mindset, how do you think we can better integrate it into the company? Do you think it's with more training? Do you think it's with integration?

**SI** I think it's with more training and some meetings, some activities, videos showing how Kaizens work, because when they send emails with just a photo of the winner and a short text and some images of the change, sometimes it's almost imperceptible. I think this way of publicizing and showing and holding meetings, updated training, I think that contributes.

**AA** Okay. One final question about the future.

What do you think would help workers, in this case us, to see Kaizen more as an opportunity and not as an obligation? It's a bit like what we always talk about now, isn't it?

**SI** Make it more dynamic, more serious, more established, more serious. So I think Kaizen has to be more dynamic, it doesn't have to be when you get the email, oh, you need to hit the target of two Kaizens in the year and then the person does something, you know? I think it has to be better implemented like that in the company.

**AA** Okay. One final note. Is there anything else you would like to add about your experience with Kaizen in the company?

**SI** No, I don't think I can even explain why I had so few Kaizens.

**AA** Do you think there was a lack of interest, perhaps, on the part of, not necessarily you, but your managers, or the people?

**SI** Yes, it was more that. And also after everything that happened, when I went to work on Saturday to do studies for this Kaizen, and then it had to stop because of everything that happened. And now that it's coming back, this Kaizen can be implemented.

So it's a matter of time. And others like that, it's more of a personal issue, a lack of ideas and something like that.

**AA Thank you.**

## Appendix G – Interview 6 Transcript

08/2025

Interviewee: Subject F

### General information:

- Name: Subject F
- Department/Work Area: Key account, Commercial area Years at the Company: 28 years
- Position: Sales technician

### Understanding and experience with Kaizen:

1. How would you describe your understanding of what Kaizen is? Would you say your involvement with Kaizen is High/Medium/Low?

**SI** I understand perfectly what the Kaizen philosophy is, as I have been working at this company since before the process began. At the moment, I would say my involvement is low.

2. When was your first contact with Kaizen at Happybus?

**SI** At the beginning of the process, the initial dynamics of Kaizen were somewhat different, more interactive and dynamic. It then evolved into the current process, which does not captivate anyone and promotes a culture of "useless Kaizen."

3. How involved have you been in Kaizen projects?

**SI** Very Little

4. Can you give an example of a Kaizen initiative you have participated in?  
And what was the most productive Kaizen you submitted?

**SI** I have worked on Kaizens that have made millions for this company. I have also done many Kaizens with Levantes vehicles, and more recently I did a Kaizen on work manuals, to provide guidance for those who come after me.

**Benefits:**

5. In your opinion, what were the greatest benefits that Kaizen brought to Happybus?

**SI** It brought development and innovation, but it also brought arrogance and wasted time.

6. Have you noticed any long-term changes that the company or your department has undergone based on Kaizen?

**SI** Yes, of course , which has brought improvements. It would be bad if we had a philosophy that had been implemented for years and there were no improvements.

7. Is the application of Kaizen useful in an office context? Or should it only be applied to production?

**SI** It would be useful if it weren't the subject of ridicule, with kaizens that are disrespectful to the company and the concept.

**Challenges:**

8. In your opinion, what were, and continue to be, the biggest challenges to implementing Kaizen at Happybus?

**SI** The biggest challenge is getting it into people's heads that this is something serious, that we can't play around with Kaizen. The improvement department itself is not efficient. There is no plan to improve the entire process. We do Kaizens that don't improve anything, which are accepted because we have to meet quotas.

9. Is the implementation of Kaizen more accepted in a production context than in an administrative context? If so, why?

**SI** It is more accepted because it is ingrained in those who work in production that any improvement they make is a Kaizen, and not that any Kaizen is an improvement.

10. Have you ever resisted or seen colleagues resist a Kaizen initiative? What were the reasons?

**SI** I don't think there is resistance, just a lack of enthusiasm. Colleagues do kaizens, but they don't think about them and it's not done proactively.

11. Do you feel that the Kaizen philosophy is well promoted by the company?

**SI** Yes, there is a lot of promotion to Kaizen.

**Culture, Motivation, and Leadership:**

12. Do you feel that the company's leadership believes in and values Kaizen practices?

**SI** No, I think if it was valued, things would be done differently

13. Do you feel that employees are motivated to participate and submit Kaizens? Or is it seen as an obligation?

**SI** It's clearly more of an obligation. From what I see, people just want to fulfill their Kaizen quota, even because they have it in their annual goals, and not to promote real change.

14. How does the company culture affect the way Kaizen is implemented? Do you think Kaizen could be even better integrated into the culture? How?

**SI** I think the company culture is one of progressive improvement over time, and that fits in with the Kaizen philosophy, so I would say that although we have many flaws, there is a cultural identification. Better integration would require a change in people's mindset, but it is difficult to follow the Japanese example, as Portuguese culture is what it is, and Happybus is a company based on that Portuguese culture..

15. What is the role of recognition and feedback in promoting and motivating people to submit Kaizens?

**SI** The role is very important. Without recognition, no one in this company would think about doing Kaizens. There are those who do it just for that

reason, but I think it is poorly structured and does not value those who do Kaizens on this side of the office.

**Suggestions for the future:**

16. What else could be done to improve the Kaizen process at Happybus?

**SI** I think the department that manages Kaizen could be improved, in an attempt to create a Kaizen process that is less focused on submission and more on ideas and progress. When we focus too much on numerical targets, we lose the essence of the initial philosophy.

17. What could help workers see Kaizen as an opportunity rather than a requirement?

**SI** A little like what I said before, more organization and fewer quotas, more critical thinking and less numerical thinking.

## Appendix H – Interview 7 Transcript

08/2025

Interviewee: Subject G

**AA** Okay, to start tell me your name, the area you work in, how long you've been with the company, and your role.

**SI** Okay, so my name is Subject G, I've been working in the commercial department since 2022, which was also the year I joined the company, so I've been in the commercial department since I joined Happybus. And my job title, the fancy name, is International Tenders Manager, but basically I'm responsible for organizing public tenders.

**AA** Right, and would you say your involvement with Kaizen is high, medium, or low? How would you describe it?

**SI** I didn't know about Kaizen before I joined the company, but since I joined, my involvement with Kaizen has basically been related to the culture that is implemented in the company, so I must have the same involvement as all my colleagues. There is this Kaizen routine that we follow, and therefore my involvement is the same as everyone else's, through this routine that was created, of having this Kaizen competition.

**AA** Would you say it's average?

**SI** Average. Yes, that's right.

**AA** How would you describe your understanding of what Kaizen is? Would you say you understand well what the philosophy is, what Kaizen itself is, continuous improvement, are you familiar with that issue?

**SI** Yes.

**AA** Okay. And when was the first time you came into contact with Kaizen in Happybus? Do you have any idea?

**SI** Well, actually, I was going to say it was when I joined, but it wasn't. With the concept of Kaizen, maybe it was when I joined. Then the implementation of Kaizen here at the company also depends a lot on the pivot you have in your area, and in the beginning, we had a pivot that didn't really feed into that culture, so I didn't value it that much either. Then when the pivot changed, we had another pivot that fed more into this issue of continuous improvement, participation in the Kaizen competition, etc. And that's when I started to give some importance to Kaizen.

**AA** Okay, okay, how involved are you right now in Kaizen activities and projects, and can you give an example of a Kaizen initiative you've participated in?

**SI** How involved am I? Well, it's moderate involvement again, isn't it? And a Kaizen initiative I've participated in. well, as I already explained, throughout the year, we always have this Kaizen competition, in which each department and each person is assigned a number of Kaizens that must be achieved. So, the latest initiative I'm involved in is this one, which I'm basically involved in throughout the year, every year.

**AA** And do you remember any Kaizens you've submitted? Which would you say was the most productive Kaizen you submitted?

**SI** Yes. I think the most productive Kaizen I submitted was when I joined the company, because when you come from outside, you have the ability to look at things with fresh eyes, and that allowed me, from the outset, to make some changes and implement some things in the direction of continuous improvement. So I think the best Kaizen I submitted was shortly after joining the company, although it wasn't with the first pivot, it was with the second. So, I had already created this initiative, and only later was it registered as a Kaizen because I didn't know it was a Kaizen.

**SI** But it was the creation of a common work file and SharePoint, and that was it, and the organization of the work in a different way, of the sales team, yes.

**AA** Okay, in terms of benefits, what do you think were the most visible benefits that Kaizen brought to the company, to the workplace, and ultimately to your day-to-day life?

**SI** Well, I think that, in general, people are a bit critical of the way Kaizen is implemented at Happybus, but I'm in favor of it, because continuous improvement should be something we all nurture, regardless of the obligation to meet the targets that are demanded of us, and Kaizen, at its core, is a philosophy, a work methodology, etc., that everyone should have regardless of these numbers that have been proposed to us, or, like, imposed on us.

**SI** But the truth is the same, I think that if we didn't have this imposition, we wouldn't remember the need for continuous improvement so often. And so, I think, well, I see the way Kaizen is implemented, I see it in a positive light, and I think it makes sense.

**AA** Do you think it has brought benefits?

**SI** Oh, yes, yes.

**AA** Have you noticed any long-term changes in the team? Do you think Kaizen has brought long-term benefits? Have you noticed that?

**SI** Well, the individual Kaizens that each person submits, and which are submitted not only individually, but also in pairs, I think it has brought benefits.

**SI** I think that this obligation to meet these Kaizen numbers means that we are constantly concerned with having Kaizens, suggesting Kaizens, and improving the things we are doing in the company. In addition, I think it also contributes, especially when we started to have pivots who were more concerned with the Kaizen culture and forced us a little to achieve those numbers that were imposed on us, I think it also contributes to the notion of teamwork.

**SI** Do you understand? For teamwork. Because there started to be this thing of, okay, if everyone does their Kaizen number and I don't, the team won't reach the total value. Because this then contributes to everyone's evaluation.

**SI** So, when that motivation started to kick in, and when people started talking about it more, and the pivots changed, etc., I feel like it also contributed to team unity, let's say.

**AA** Continuing on that point, I think you already talked a little bit about this, but not directly, but do you think Kaizen in an office context is useful or should it only be applied to production?

**SI** I think it's useful in an office context, but I think it has to be adapted. If you want it to develop a little more, I think the way the criteria for Kaizen is being implemented has to be adapted to the reality in which it is being implemented. If it's Kaizen for administrative areas, we need to have a Kaizen assessment, etc., that is appropriate for this. But I think that it makes sense in all areas.

**AA** But do you think it is equally accepted in production as in offices, or do you think that because of this lack of adaptation there is less acceptance on the part of people who work in the office and do Kaizens?

**SI** I wouldn't say acceptance, but there is a lack of credibility. Yes.

Because the way Kaizen is structured at Happybus, specifically, is very focused, with criteria that apply almost exclusively to production. And so, people in administrative areas cannot see the benefit of participating in Kaizen or developing continuous improvement strategies. But there you go, if these criteria are reviewed, and from what we hear they are being reviewed, I think so, I think Kaizen will also be given greater importance in administrative areas.

**AA** Okay. Beyond the issue of criteria and the evaluation of what Kaizen is, what do you think is the biggest challenge to implementing Kaizen in the company, in the department, or in your experience, in this case? What do you think is the biggest challenge in motivating people?

**SI** I think that part of motivating people has already been completely overcome with the issue of it being part of our evaluation and, therefore, it is probably still one of the easiest points of the evaluation to achieve. We just have to comply with those Kaizen values, so I think that issue of motivation has already been overcome.

**SI** I think the biggest challenge we face with Kaizen is precisely what we just talked about, which is having a Kaizen methodology that is adapted to the different areas of the company. This is the barrier we have been feeling.

**AA** Following on from that, then, have you never felt that any colleague has resisted any Kaizen initiative, or have you yourself, for any reason, never witnessed any resistance?

**SI** Resistance, only in the sense, as I was saying, of discrediting, of devaluing. Because if we don't understand the impact that Kaizen has on our work reality, of course there is discredit, and then of course there is a certain resistance when there is this incentive to "no, but register Kaizen, do Kaizen," but why, if this has absolutely no impact on my work? And if, on top of that, I can't get it implemented in my work, right? I think it had a little bit to do with that.

**AA** Do you think that sometimes there may be more important things? In the sense that your work makes people resist Kaizen a little, sometimes because there are more important things to do, right?

**SI** Maybe that can happen, yes, because Kaizen is something where you see the impact of continuous improvement, often not in the short term, but in the long term.

But then it's a question of mindset, but I don't feel that this is the biggest problem. I think that resistance comes largely from our lack of understanding. Because, again, we come back to the same issue of departments. For example, if you go to production, and production has implemented Kaizen in the area of safety, for example, when boarding buses, they have implemented Kaizen related to safety by installing lifelines. They value this because they can see the impact of it on their work.

**SI** Administratively, which is what I can talk about, it's very difficult to understand what the impact of Kaizen measures is on our work. In the way Kaizen is implemented there in the company. And so the resistance comes from this.

**SI** It comes from "Man, this doesn't even make sense here in our area" Do you understand? It's not even so much about having more important things or not.

**AA** Do you think these difficulties may come from the way Kaizen is communicated and promoted by the company, or do you think Kaizen itself is well promoted? Even with these minor difficulties in terms of implementation, do you think it is well promoted, in the sense that the company is very concerned that Kaizen is widely shared and promoted?

**SI** I don't think so, I don't think it's well promoted. And besides, as I said earlier, for example, for me, the change of pivot had a big impact on the way I saw Kaizen.

I feel that it's not promoted very well and that it depends a lot on the pivot you have. If you have a good pivot, you feel motivated to record Kaizens.

**AA** You feel that company leadership, or your leadership, or in this case leadership in the pivot context, if it basically supports Kaizen values and if there is identification.

**AA** You feel that those who lead the company, or the department, or part of Kaizen, have good leadership in terms of promoting Kaizen. Going back to the previous question, do you think, for example, that the company's leadership is concerned with Kaizen?

**SI** Here at the company, Kaizen is an area that falls within the scope of continuous improvement in the quality department. So we can look at this in two ways.

The people responsible for Kaizen here are those in the quality department, in continuous improvement. If I think they promote the Kaizen methodology, etc., I think it could be better, it could still be promoted better, but I think it's part of their job. It's part of what they do.

**SI** Regarding leadership, which is not involved in continuous improvement, for example, let's imagine directors, managers, etc., I don't think everyone values the

Kaizen methodology that much, and then of course this also falls on the team, because if you have a director who doesn't submit Kaizens, how are you going to get people on your team to submit Kaizens? So I think the department responsible for this area is part of the work that has to be done, although perhaps it could take even more measures, etc.

**SI** Those who are leaders often end up neglecting this a little, but I'm not saying it's a direct responsibility, of course it is, but they often have other responsibilities and time doesn't allow them to participate in these initiatives, etc.

**AA** Regarding employees, people you work with, do you think we feel motivated to participate in Kaizen, or do you think it's more of an obligation? You already said that you think people feel a bit obligated.

**SI** Yes, yes. I think it's because of the context that has been created here, of competition, and because it's part of our evaluation, I think that's the main motivating factor for people to participate, yes. It's not a philosophy that has been implemented, you understand? It's motivation because of the evaluation.

**AA** Yes. That's why I asked this question.

**AA** A slightly different question, but this is probably the most important question I'm asking. Do you think that company culture affects the way Kaizen is implemented? Do you think that company culture affects the way Kaizen is implemented? Do you think that, I don't know, sometimes the way we work or how we view certain types of practices, do you think that, for example, sometimes a certain sloppiness, sometimes a less professional way of working, or an aspect of that influences the way we view Kaizen? Do you sometimes think that by being less demanding in some things, we are also less demanding from a Kaizen point of view? What do you think about this in terms of culture?

**SI** Yes, that's right, for now, Kaizen is not, culturally, a methodology that is in line with Portuguese culture. Right from the start. And our company is a Portuguese company, an organization with a very characteristic and very traditional Portuguese organizational culture.

**SI** As Portuguese people, we are much more accustomed to methodologies that have short-term results than methodologies that have long-term results, so much so that we are known for being resourceful, right? With all the good and bad that comes with it. And Kaizen is not a culture of resourcefulness. Kaizen is a culture of continuous improvement and preparation, basically.

**SI** So, it's something where you'll see results in the much longer term, and often you might not even see those results. Do you understand? That's why I think Kaizen... The difficulty of implementing Kaizen here in our company has a lot to do with that too, with our culture as a Portuguese company with all the characteristics that entails, you know.

**AA** How do you think we could better integrate Kaizen into the company culture? Do you think there is a solution for that? Do you think it's purely a cultural issue that sometimes doesn't have much of a solution because it's static?

**SI** Cultures, sometimes, I think although there is a static factor here, yes, from what I just said a moment ago and what you just mentioned. On the other hand, I also think that if this culture comes from the top down and not horizontally, a moment ago I was saying we have a department that is responsible for this and I feel that they do their job, but this is side by side with us, this is not something that comes vertically, it does not come from management to the departments. I feel that if this culture were nurtured by management, perhaps we would also be more aware of it culturally.

**SI** Then there are also other issues, we work hard on identifying errors and accountability, and this is also not compatible with the Kaizen culture. Because the Kaizen culture is, okay, maybe identifying the error, but seeking to improve that situation regardless of accountability.

**SI** And I think that's it. This comes very much from management down. If management has this attitude of, no, we have to constantly seek to improve, always improve processes.

**AA** Just one final question I have here. What do you think is the role of feedback and recognition in this Kaizen process? Do you think there is recognition of our actions in terms of Kaizen? Do you think we are well recognized in terms of awards or appreciation?

**SI** Well, I think it is there. I can speak from my point of view in the administrative area.

I don't think the effort we put into implementing Kaizen is that well recognized. I do think the system for recognizing the creation and implementation of Kaizens is well done, so there's the issue of awards, etc. Yes, I believe it's well done, but again, I think continuous improvement is something that has to be recognized by our management. And sometimes it's not the Kaizens that come in first, second, or third place that are important, but the Kaizens that are really important to our day-to-day work. For example, I'll give you a very basic example: when I joined the company, the sales meeting room didn't have a schedule. Anyone could walk in at any time, which was a pain because someone was having a meeting and someone else needed the room. There was no schedule, and a schedule was created. This was not my initiative, but a calendar was created to put on the door of the room where people could record the time they were going to occupy the room. That was a spectacular measure, but no one ever heard about it. It just happened, everyone liked it, but there was never any recognition.

**SI** And maybe if there had been recognition, it would have made people feel more motivated to participate in the future. This wasn't a gold Kaizen, it wasn't a silver Kaizen, which is how they are defined in the company, to move on to the awards, but it's a Kaizen that makes all the difference in our daily lives.

**AA** How would you recognize that?

**SI** I would probably take advantage of a more general meeting, for example a sales meeting, or for example in the commercial department, there is a meeting on Monday where there are a lot of people from the department, I would take advantage of a moment like that to say good initiative, something like that, I think that would be enough.

**AA** And you think that would probably make people see it more as an opportunity and not as an obligation as well.

**SI** Yes, maybe they would notice that simple gesture I made, that simple initiative, which resulted in recognition from my boss. So maybe I'll see what else I can improve, right?

**AA** Well, I had one last question, but you've already answered it, really, how can we improve Kaizen in our company.

**AA** Okay, just one final note, I don't know if you want to share any other experiences you've had with Kaizen.

**SI** No.

**AA** Thanks.

## Appendix I – Interview 8 Transcript

08/2025

Interviewee: Subject H

**AA** Here we are. Good morning. Tell me your name, your area of work, your department, and what you do at the company.

**SI** Well, my name is Subject H. I've been with Happybus since December 2022. I work in the sales department. I'm responsible for the technical team, which supports the salespeople.

**AA** Tell me about your involvement with Kaizen, is it high, low, or medium? How would you classify it?

**SI** I would classify it as meeting expectations. In other words, I am given a Kaizen goal each year, and I always try to meet it.

**AA** Okay, I see. Regarding your understanding of the Kaizen experience, how would you describe your understanding of what Kaizen is? Would you say you understand it well, that you understand the concept?

**SI** Yes, I understand the concept, of course I do.

**AA** Reducing waste, do you understand the logic?

**SI** Yes, I understand that it's at the heart of the matter. I don't know if that's the question, whether it is or not, but yes, I understand.

**AA** When was your first contact with Kaizen in this company? Do you have any idea?

**SI** I do, as I told you, I joined the company in December 2022. In January, I started recording a Kaizen. And it was the first administrative jishuken they did at the company. In other words, it was the first jishuken applied to administrative processes, that's it. For engineering, that's it.

**AA** For the context of the company, please explain what a jishuken is.

**SI** jishuken is basically a task force that identifies a number of points for improvement, and then I have a procedure for identifying what is currently being done, the data, what can be improved. And then, basically, that's it.

**AA** Basically, then I had question number 4 here, which was an example of a Kaizen initiative.

**SI** Okay, so you have the example of the Kaizen initiative there.

**AA** How involved do you feel, at this moment, in terms of Kaizen activities? Do you feel that it's enough? It's mainly that question of fill the quotas?

**SI** That's mainly it. I believe that the Kaizen methodology can be applied to any work process, however, I think that the way it is designed, it is more suitable for operations, not so much for administrative processes like ours.

**SI** And so, we have the same fulfillment criteria as our colleagues in operations, because they are totally different processes. I think that's what motivates not only me, but perhaps my colleagues, to do this type of work.

**AA** I was going to ask you what was the most productive Kaizen you had submitted.

I don't know if you consider it to be that jishuken you mentioned.

**SI** No, no. Especially because the jishuken issue was something that ended up not being fully implemented, because, in the meantime, there was also the issue of the new partnership with CRRC.

**SI** To give you an example, we had several points, such as finalizing the specification eight weeks before the SLP, so there were several things. That was a goal, but at jishuken we took several measures to actually achieve that goal. One of them was to issue a final freeze signed by all departments, as a commitment, eight weeks before the SLP.

**SI** But now with the changes in business strategy, although this is still necessary, of course, the scope has changed a bit.

**AA** Okay, and a Kaizen that you submitted.

**SI** Let me think, at the time, when I joined Happybus, we started using Trello for team task management, and I think that was the Kaizen.

**SI** The Kaizen for inspections may also have some productivity, but I wasn't directly involved in that. That was Subject B's idea.

**AA** Okay. Regarding the noticeable benefits of Kaizen, what would you consider to be the most visible benefits that Kaizen has brought to your work, to the company? What do you think about that?

**SI** Well, in my work, perhaps indirectly so far, apart from those we have been developing, such as the organization of folders, the Trello issue, which is no longer Trello.

**SI** A little more 5S, in that sense. Now, perhaps at the operational level, we have several examples, and certainly our colleagues in operations are always very proactive in this area, so I believe that many of the Kaizens have brought great gains to the company.

**AA** Okay. Have you noticed any long-term changes in the way your team works because of Kaizen, or is that in line with the previous question? Do you think it's more in terms of organization?

**SI** Yes, yes, it ties in with the previous point. The team doesn't work with a focus on Kaizens. I think it's more that Kaizens are the result of the new organizations we have to create, or are creating, rather than the other way around. We are not guided by the need to do Kaizen, although, as I said, we have those goals, and that's it. And, at least for me, my view of Kaizen in the company is to meet the goals.

**AA** Well, that's it, because that's also what my next question is about, which is whether you think Kaizen is useful in an office context, or whether it should only be applied to production.

**SI** It is useful, it is useful, but we should separate them, because we at Happybus have a form to fill out, and that form is totally unsuitable for our tasks, it is more suited to operations.

**AA** In your opinion, what do you think are the biggest challenges to implementing Kaizen? What have been, or what do you feel are the challenges, the obstacles, in this case, to implementing Kaizen in the company, in your area?

**SI** I don't think it's so much resistance to change, because that doesn't happen, it's more about making it a habit.

**AA** Don't you think it's resistance? Don't you think, for example, that older workers are more resistant to applying this kind of thing?

**SI** Ah, yes, that, in general, we know happens. I speak from my own experience and that of the team.

**AA** We also have a young team.

**SI** Yes, of course. And it's also open to this type of change. So, I think the main difficulty, and there it is, is not the application of Kaizen, because, as I say, Kaizens are usually the result of these improvements.

**SI** It's more that sometimes we have an idea in a meeting about how we can improve our work, but sometimes those ideas involve microtasks that have to be done. And sometimes that's what fails, it's that habit, that routine.

**AA** In other words, there are other things to do, right? I understand that sometimes it's not necessarily a priority.

**SI** That's right, that's right. I'll give you the example of Trello. Trello required that when you did a task, or finished a task, you just had to mark the card as complete.

**SI** A task that's a little... I mean, it's a microtask that doesn't directly increase your productivity, but it was necessary. And, well, that's the kind of issue I'm talking about. Okay.

**AA** You already said that you think Kaizen is a little more accepted in production than in offices. Why do you think that is? Is it because it's more practical?

**SI** It's because it's more practical, perhaps? Because it's more oriented... Well, I'm speaking from my own perception. Maybe for my colleagues in engineering, it's not like that.

**SI** I'm speaking from my own perception. Kaizen, as it stands, the Kaizen submission procedure, as it stands, is not at all suited to our reality.

**AA** Have you ever felt that a colleague or someone else, or you yourself, resisted a Kaizen initiative for some reason? Have you seen this happen? Have you felt any resistance?

**SI** No, not really. I can give examples of situations that I have witnessed, not done by me, but by our colleagues, where some questions were simply raised. Some of them were clarified, others were adapted. Because then there are also Kaizens that involve other departments, and there is always this concern to ensure that everything is clarified.

**SI** And that's it. I think it's more... I mean, those who do Kaizen also sometimes have to understand if it will have a direct impact on other departments and, if so, they must also have the flexibility to adjust it.

**AA** Do you feel that Kaizen is communicated and promoted by the company in the right way? Do you feel that it is encouraged? How do you feel about the communication from those who manage the company's communication regarding Kaizens?

**SI** It's always difficult to make that kind of assessment. I know there are weekly emails. There are weekly emails providing information. I don't believe that if it

were done differently, there would be greater involvement. I think it's mainly in the Kaizen submission procedure.

**AA** Moving on to the part about culture and motivation. Do you feel that the company's leadership, even your leadership, your managers, do you feel that they support Kaizen values? Do you feel that there is an embrace of that culture in that sense?

**SI** Yes, I believe so. They themselves are proactive in this area and motivate us to carry out Kaizens. Our management is committed.

**AA** Okay. After this question, you also answered whether you felt motivated or if it was more of an obligation, in the sense that we have to meet certain objectives.

**AA** How do you think the company culture affects the way we implement Kaizens? Do you think that if our culture were sometimes a little more demanding in some areas, it would affect our implementation of Kaizen? Do you think there is a connection?

**SI** Obviously, organizations are led by their leaders, right? And that ties in a bit with your previous question. If our management didn't lead by example, we probably wouldn't feel compelled to do Kaizens, to achieve the goals. I think it also comes a bit from the company's focus or the focus that the company has on continuous improvement.

**SI** That's part of our company philosophy, isn't it? Also because of our association with Toyota. It's deeply rooted in the structure. Whether it works or not is another matter, but it is deeply rooted and it is a focus. In fact, it's not just our company. Other companies in the group also have this focus on continuous improvement and process improvement. So, yes.

**AA** What role do you think feedback and recognition ultimately play in this Kaizen process and in continuous improvement itself? Do you think we would be more connected to Kaizen if we were more recognized? Do you think we have been recognized sufficiently for the effort we put in? Do you think it's good feedback?

**SI** Yes, I think so. I don't think that's the case. I don't think we should work for the sake of feedback. I think the feedback we get is already sufficient.

**SI** In other words, recognition is also part of our daily lives and the improvements that Kaizens bring to our daily lives. I insist that the problem is really the submission process. For me, that's where the big problem lies. Because then, I think that by improving this procedure, the Kaizens themselves will also improve and their visibility will improve. Because sometimes the idea may be good, but you start putting the data into the Excel submission form and it doesn't make any sense. I think that's kind of where it lies.

**AA** You've basically already answered my next question, which was to say what could be improved from Kaizen's point of view: it's the procedure.

**AA** How do you think Kaizen could be better integrated into the company culture? Do you think it's a bit of the same issue? Do you think it should have to do with the procedure? Do you think there should be an adaptation to the company culture?

**SI** We've now changed the company's values. We may be working towards that, in a way. I believe that Kaizen's objective is well aligned. Especially because Kaizen wants to be a simple thing. It has to be a simple concept, right? It's about small steps.

**SI** For me, the big problem now is the procedure. Then maybe other things will come up, but I think that now, in the initial phase, it would really be a matter of changing the procedure.

**AA** Okay. On a final note, would you like to share any experiences that you haven't shared with Kaizen lately? If you don't want to, we'll wrap up. This is just a final note.

**SI** I think I've already shared the most relevant ones, yes. I don't think I have anything else to add.

**AA** Thank you very much, then.

## Appendix J – Interview 9 Transcript

08/2025

Interviewee: Subject I

**AA** Tell me your name, the department you work in, and how many years you have been in the job.

**SI** My name is Subject I, and I work in the Commercial Department at Happybus. I have been with the company since 1989, always in the commercial bus division.

**AA** And what is your role?

**SI** I work in sales, I'm a commercial technician, I'm a salesperson.

**AA** And how involved are you with Kaizen? Would you say it's high, medium, or low?

**SI** I would say it's medium.

**AA** How would you describe his understanding of what Kaizen is? Kaizen philosophy.

**SI** The Kaizen philosophy is defined as the process through which continuous improvement is sought through small changes, small improvements, with the involvement of everyone. Of course, first there has to be a diagnosis, what needs to be done, what doesn't, establishing your goals and then incrementally implementing that philosophy, improving little by little, introducing small improvements in the process, which can be several processes, right? With a view

to the overall improvement of what is being done, the economy of resources, all of that, right?

**AA** And what was your first contact with Kaizen in this company? Do you remember that?

**SI** It's been a while, so my knowledge of Kaizen goes back several years.

**AA** And how involved have you been with the Kaizen project at the moment? Have you submitted Kaizens? How has it been?

**SI** No, not at the moment, because we are going through a very particular and almost unusual moment in my commercial process, because there have been serious problems in terms of production delays and changes in homologation that have prevented us from delivering buses for over a year, and my Kaizen was basically to manage this whole situation and prevent customers from giving up on the deals and applying the very considerable penalties to which they were entitled. Few have done so. So my work over the last year and a half has basically been to try to manage this whole situation, which has been very, very difficult to manage at all levels.

**AA** What was the most productive Kaizen you submitted?

**SI** There was a Kaizen that we did at the production level where it was submitted. So, I was involved in the process, along with two other colleagues from the industrial area, from the production area. I think it had to do with an improvement in a product, in a venture.

**AA** Okay. That reduced waste, right?

**SI** It improved the process, yes. It objectively improved the vehicle, yes.

**AA** Moving on to the benefits, what would you say are the biggest benefits that Kaizen has brought to our company, to our department?

**SI** It is, essentially, the involvement of everyone, the entire team, in this idea that everyone, regardless of their level, hierarchy, or role, can make a contribution, however small it may seem, and that this will ultimately contribute to the continuous improvement of everything we do and everything the company does. And by improving, it brings the benefits that come with it, which are cost reduction, product improvement, increased customer satisfaction, and all that.

**AA** And this product improvement, these benefits, you consider that they were long-term changes that he observed in terms of the implementation of Kaizen? Did you feel that there were benefits and implementations that you observed in the long term in terms of Kaizen?

**SI** I think so, I think so. I see everyone involved, in the various departments, I see the information that is sent to me by email and all that, so I think it's undeniable that there is a lot of involvement from people in this philosophy.

**AA** Do you think Kaizen is useful in an office context or should it only be applied to production?

**SI** I think Kaizen is useful at all levels, in all areas, although there may be areas that, due to their nature and specificities, lend themselves to producing more Kaizen opportunities than others, but I don't see Kaizen as being exclusive to one or a few areas of work. I think Kaizen is something that should be present, even in our personal lives, if we want it to be.

So, in addition to our work, we all have our personal lives, we have our commitments, we have the tasks that we are also involved in in terms of family and personal matters. And this idea that we are able to look at what we do, even

on a personal level, and realize that there is one aspect or another that, if we introduce a change, will ultimately benefit our lives, is also useful. So, I don't think there are any areas that are exclusive to the application of Kaizen.

**SI** I think Kaizen is, and that's why it's called a philosophy. Philosophies are usually generic approaches, right? I think Kaizen is too. Yes.

**AA** I'm asking this question because, based on the premise that it is useful in both contexts, as there have already been several answers to that effect, do you think that, even though it is useful in both office and production contexts, it is accepted in the same way in both areas, or should it be applied differently?

**SI** Well, what I think, and I have no doubts about it, is that I firmly believe that in more technical areas, where there are more processes, which lend themselves to many introductions, that is, I think there is a greater likelihood of a person coming into contact with aspects that could be improved than in other areas that are perhaps more administrative.

**SI** Although in these more administrative areas they can also be improved, and I'm sure they are, right? Now, I believe that, for example, in an industrial area where a product is manufactured, and here in our specific case of the bus, it is a large product, and it has, and I often say this jokingly, that bus production is a kind of industrial craftsmanship, so there is a very substantial involvement of labor, there are many operations, micro-operations, medium-sized operations, and all that, with the teams imbued with the Kaizen spirit, all of which can be improved. Even though the aspects that can be improved here are, of course, smaller, more minor, the probability of there being aspects to improve is very high in terms of quantity. Basically, that's it. And since people are also very involved manually in things, with this spirit of Kaizen, they will realize that these opportunities to improve the process are considerable.

**AA** Many people gave me a perspective that, for example, it is sometimes less accepted in an office context because of the way it is worked, for example, in the forms we have to fill out, there are many complaints or criticisms about that. Well, being outside, is not so connected to that issue either.

**SI** Yes, I confess that I am not familiar with that administrative part of Kaizen, am I? Now, in an office environment, I have no doubt that Kaizen is useful because it is, isn't it? For example, just talking about people's comfort in the administrative area, that is, an analysis of comfort in terms of noise, air conditioning, lighting, the layout of the desks themselves, and all that, that is, all of that can be improved, and by improving it, it will also improve people's performance in that area, right? People's work.

**AA** Regarding resistance, because this thesis focuses a little on what resistance is in terms of resistance to the implementation of Kaizen in companies, sometimes due to cultural issues.

What would you say were the biggest challenges to implementing Kaizen Happybus? Do you think it would be because older people are more resistant? What would you say were the biggest difficulties, or what did you observe to be the biggest difficulties?

**SI** At my level and from what I have been able to observe, I do not notice this context of difficulties in implementing Kaizen and adhering to the Kaizen philosophy. Now, what I believe is that Kaizen, in some organizations, I'm not saying ours, but in some organizations, in some companies, Kaizen can sometimes fall flat or come across as almost a slap in the face.

In other words, if a particular organization does not have a culture of involving people in the life of the company, if it is an organization that does not invite people to participate, if people's opinions are not promoted or even welcomed, and if suddenly that organization wants to implement a Kaizen system, I believe that in an organization with that context, with that environment, Kaizen will not

be well received at first. Because, you see, we are now talking about Kaizen, which is more of a philosophy from Japan and the Toyota Motor Corporation, from Toyota itself, but Kaizen, if we abstract ourselves from the name, Kaizen is basically a natural way of being in a company, in an organization. A person who works, whatever they do and for whatever reason, should, has a duty to be aware of what is going on around them and anything they see that is not right and could be improved, to alert others, draw attention to it, and contribute to it.

**SI** So, Kaizen now exists, there is the Kaizen Institute, there is the Kaizen philosophy, everything is very official and has a face and a name, but deep down it probably already existed. I'm sure there have been organizations in Portugal and not only in Portugal that have managed to penetrate their market by, let's say, inviting people and welcoming people to contribute to improving things, without them knowing that they were talking about a philosophy called Kaizen, right? It makes sense that there is a name and that books can be written about it and that the philosophy is even more detailed, but we believe that this is a somewhat natural way for an organization to exist. If companies are made up of people, it doesn't make sense for people to be in an organization and not contribute to improving that organization's processes, does it?

**AA** Have you ever seen anyone resist Kaizen?

**SI** No, I confess I haven't. And I am very involved in the process of preparing for vehicle delivery, and I often see a colleague suddenly say, "We could start doing Kaizen on that because this problem has really persisted and everything."

From my perspective, at the level I've been at for the last year and a half, I see almost the opposite, don't you think? I see people, in a way, attentive to opportunities to introduce Kaizen.

**AA** Do you feel that Kaizen is communicated and promoted by the company in a positive way? Do you think there is promotion and incentive, and that the philosophy is communicated correctly to employees?

**SI** In terms of the people I have been working with most closely over the last year and a half, two years, I feel that yes, I think people are, in a way, committed to this idea and talk about it quite naturally.

**SI** That's how it seems to me, in general, among the people I've been working with most.

**AA** And even among the leaders, do you think they share the values of Kaizen? Do you think there is support, encouragement, promotion?

**SI** I work with both some leaders and their teams, and I assume that if I see the teams in the field, the ones I have the most contact with, if I see them talking about this and attentive to opportunities to apply Kaizen, I admit, and assume, that this attitude also comes from what the managers say, I admit that it does.

**AA** Do you feel that people, especially where we work, feel motivated to participate in Kaizen or do they see it more as an obligation, in the sense of meeting the goals of doing Kaizen?

**SI** Once again, in terms of the people I have been working with most closely over the last year and a half or two years, I see this as quite natural, don't you think? Now, I confess that I don't know because I've never done it, but if Kaizen really is something that has a heavier and more time-consuming administrative side to it, I believe that this could then have a slightly perverse effect of not encouraging people to participate as much. In other words, if it really is a somewhat complex and time-consuming process, I don't say complex, but time-consuming, I think that we should really think about making something that is good and beautiful,

which is an idea to improve something, be communicated in an expeditious way, right? And that person, basically, doesn't have, let's say, a somewhat time-consuming process ahead of them, and we know today that more and more is demanded of people and we are increasingly called upon to work, so I think we need to be aware that people cannot be victims of the process, that is, people should be able to collaborate and contribute in a natural, quick, and expeditious way. I think that's fundamental, don't you?

**SI** It's almost like we don't want to, let's say, contribute. Imagine, we live in a town and we're walking and we see something and we want to report it to the City Council, and suddenly there's a process to do that and we have to spend 40 minutes filling out the form. It doesn't make sense, so if we want people to contribute their knowledge, their experience, their genuine desire to improve things, we have to make it possible for them to do so in a natural and expeditious way, even if there are people behind the scenes, not the ones who presented the idea and the opportunity, but other people, who may then have a heavier workload in terms of processing the Kaizen. But whoever comes forward to present and communicate an idea should be able to do so quickly and efficiently, so that they can continue with their work and do so as often as necessary, right?

**AA** Another question, which is a little more abstract, but basically, do you think that the company culture affects the way Kaizen is implemented?

**SI** Well, our company, Happybus, in particular, in its origins, has a culture that has its roots in quality, that is, in the fact that we were one of the first entities in Portugal to be certified in a quality system, I think we have, I'm sure we have, I'm sure, because I participated and even became the leader of a quality cycle, we, Happybus, and then this spread to areas of other companies of the group, we have a culture of excellence.

So, in other words, when I joined the company in 1989, it was already certified or very close to being certified, but I think it had actually been certified very

recently, so we're talking about the late 1980s. If we can put ourselves in the context of what the industry was like 37 or 38 years ago, this was something very remarkable at the time. So, we have this, as people like to say nowadays, this DNA of a culture of doing things right, of doing things right the first time, and this, basically, I think has points in common and many connections with the philosophy of the case itself, doesn't it? You can't have a certified product if people are indifferent to what isn't right and don't contribute to improving it, because standards and procedures don't do everything, do they? So, standards and procedures are the structure, so to speak, of a quality system, but for those standards and procedures to be correct, easy to apply, and relevant, there has to be a desire to do well.

**SI** And this, of course, is only possible if people contribute, and once again we come back to Kaizen itself, right?

**AA** Even assuming that the company culture has been around for a long time and has contributed to the implementation of Kaizen and that it is interconnected, do you think Kaizen could be better integrated into our culture, if there is something lacking, in a certain sense?

**SI** I can't answer that very confidently, because, as I said, I don't feel it in the context I come into contact with and live with. I don't feel that Kaizen has any difficulty in implementation or adherence; I feel quite the opposite.

But then again, I don't know to what extent this is a reality common to all other areas of the company. With the people I have dealt with most, I can't detect any difficulty at this level of integration of Kaizen between the company and company procedures.

**AA** Just to finish this point, do you think that the role of feedback and recognition, for example, is important in the way we submit Kaizens for

continuous improvement? Do you think we will feel more motivated? And do you think we are sufficiently recognized for the Kaizens we submit?

**SI** Well, I think it's rewarding for a person, for a group of people who do a Kaizen and see their Kaizen accepted and implemented. I think that's a very powerful and very rewarding feeling. Of course, there is also the ceremony and everything else that is important, but the fact that a person comes to work at a certain point and sees that there is something, however small it may be, and it doesn't always have to be small, and that it was one way and now it is another, and that this person had a very concrete intervention in this change, I think that is very interesting. I think it makes the person identify strongly with the company.

Therefore, I think that accepting Kaizen must be a very pleasant thing for those who do it. I think these awards and ceremonies are undoubtedly important, but before that, the fact that people see that something has changed because these people identified, observed, reported, and things really got better with their intervention, I think that is extremely gratifying.

**AA** To conclude, what do you think could be improved in terms of what you know, in the area where you currently work, with people? Do you think we can improve anything from a Kaizen perspective?

**SI** I think it's to continue, to be attentive to the Kaizens that are made to Kaizen itself. In other words, if there are people who think, whether they are right or wrong, that in this whole Kaizen system certain things are not as good as they could be or are even wrong, I think we should be attentive to the Kaizens of Kaizen so that this philosophy does not lose its momentum. I think we should, because I have no doubt that this is the way forward, for people to feel perfectly at ease and recognized for contributing to the improvement of everything around them in the company. I see no other way for a company to continue to exist and succeed if it is not this attitude of the people. Therefore, in terms of the present and the future, it is about allowing Kaizen to become something better and easier

to do and ensuring that there is, so to speak, recognition on the part of the people who adhere to this philosophy.

**AA** Okay, on a final note, would you like to share anything else about your experience with Kaizen?

**SI** No, thank you, António.

## Appendix K – Interview 10 Transcript

08/2025

Interviewee: subject J

**AA** Tell me your name, the department you work in, how many years you have been with the company, and your job title.

**SI** My name is Subject J, and I have been with the company for four years. I started as a demo manager. Currently, I am responsible for demos, sales, marketing, and communication.

**AA** How would you describe your involvement with Kaizen: high, low, or medium?

**SI** Medium, I mean, in our company it's high, put it as high, sorry. In our company it's high, isn't it? Because we aim for two kaizens per year.

**AA** Would you say, then, that the understanding of what Kaizen is, in terms of philosophy and existing methodology, is well understood, well assimilated?

**SI** Yes, it is, continuous improvement is completely... I think so, I honestly think so. Kaizen, right? I mean, it's a philosophy, isn't it? Continuous improvement. The principle is basic, I think so.

**AA** Do you remember the first time you came into contact with Kaizen at Happybus?

**SI** Yes, four years ago, when I arrived here, and do you want to know what Kaizen was?

**AA** Yes, basically the experience, yes, the first contact

**SI** Look, it was a Kaizen that was done by me at the time, by me, by my team, and it helped a lot, because when I got here, the demonstrations were a mess, the buses were going, it wasn't organized at all, okay? So that it would be easy for everyone to access, we created a file with the dates, clients, commercial clients, and how long, you know? Because then people had access to the whole team, and when they wanted to know, oh, will the bus be free? In such and such a month? Everyone wanted to go and see, and they had easy access. It was a way of organizing and improving, of course, an improvement.

**AA** Would you say that was the most productive Kaizen you did?

**SI** No, it wasn't the most productive. For example, there's another one that was productive in the sense that, financially, there was another one we did, which was the improvement in printing single sheets and catalogs, that is, creating the QR Code, which makes things much easier, and there was a huge saving. So it was also a very useful Kaizen.

**AA** In terms of benefits, what would you say were the most visible benefits that Kaizen brought to the company, the department, or, ultimately, the area in which you are most involved?

**SI** Yes, I think it made the area much more efficient, didn't it? Much faster, more agile, improved, improved. Look, in the case, for example, of this Kaizen I told you about, we reduced the waste of printing sheets, right? I don't know, you understand?

**AA** And any long-term changes that have been observed since Kaizen was introduced, or since the trial period, any substantial changes that you've seen in the long term?

**SI** What has Kaizen brought me? I think, above all, it has improved the work.

**AA** Is Kaizen useful in an office context or should it only be applied to production?

**SI** I think production, without a doubt, and we were an example of that, right? You go down there and see all the Kaizens that were implemented in production, that thing with the carts, whatever, it was much better, right? Their work is much easier, they work much faster, in a better way, everything. In the administrative area, I think some were quite important. For example, I didn't know this, but when we started having these weekly meetings with the director, it was a Kaizen proposal so that everyone would have time to explain things and ask questions. I think that was something that didn't exist before, and without a doubt, this was a majority opinion. Now, having Kaizen at the administrative level is not that easy. In indirect areas, I think more in direct production, I think it's easy, they always have...

**AA** It's practical, isn't it?

**SI** It's practical, exactly. On our side, the indirect ones, I think we end up doing silly Kaizens like turning off the lights, right? Or watering the plants, tidying up a closet, and these are Kaizens that don't really improve anything, right? It doesn't really improve the work substantially, does it? There's no improvement there that you would say is relevant.

**AA** Sometimes the way Kaizen is applied can also make a difference, right? Sometimes even how the evaluation is done, in a way.

**SI** Yeah. I don't know how that works. What's the difference between Kaizen and QCC? I ask.

Since you're in the field, maybe you can explain it better.

**AA** A QCC is a little more practical, it has more to do with, it's not exactly a Kaizen, it's something where people get together and come up with a solution through some existing practice. I think the QCC is even considered a Kaizen initiative, in that we are improving something, but it's a group project, not exactly continuous improvement in the sense of submitting a Kaizen, which is something a little more elaborate.

**AA** Kaizen is useful in an office setting, in an administrative setting, in this case, and in a production setting, but is it accepted in the same way? Or is it more accepted in production than in administration?

**SI** You saw it with our team until last year, when the last pivot took it on. And you still see it, there are a lot of people who don't do it.

**AA** What are the biggest challenges to implementing Kaizen in the company? Or in the department?

**SI** I think sometimes it can also be a bit of ignorance. I think, look, one of the things that causes resistance is because Kaizen implies change. This is normal for human beings, right? Many people say, oh no, this has always been done this way, why are we going to change it now? You see, there is a lot of resistance to the new, to changing anything, right? And people can become insecure and say, "Oh, now they're coming here and changing Kaizen." I remember when I got

down to production, they showed me all the Kaizen, the carts, "Oh, this is something they came here to do." Okay, people are always resistant to change, I think.

**AA** That may sometimes have to do with... That may have to do with age, an age requirement, in the sense that people have been used to doing this for a long time, right?

**SI** Yes, I think so. I think so.

And then, for example, not explaining things well to people, right? Because if you say, ah, this was done for this reason, because it's being implemented, it will help you, it will be... Right?

**AA** Have you ever seen a colleague or someone else resist the Kaizen initiative for any reason? Basically, showing resistance to submitting a Kaizen, to the very idea of Kaizen itself. Is it due to lack of time?

**SI** For example a member of my team, he resists Kaizen a little. He's always resisting.

Then they immediately say, I don't have time for that, it's a waste of time, you know? He's a typical example of someone who is resistant to Kaizen.

**AA** He doesn't like sudden changes?

**SI** That's what I think, I think Kaizen always involves change, and people have been used to doing something a certain way for many years, and you come in from the outside and say, "Look, maybe it would be better to do it this way," and they resist, which is normal, it's not meant in a bad way.

That's true resistance to Kaizen, to any alteration, any change.

I don't think it's because it's Kaizen, but it is.

**AA** That's a question of mindset.

**SI** Exactly.

**AA** Do you feel that Kaizen is well communicated, well promoted by the company, that the company actively promotes the submission of Kaizen?

**SI** I would say yes, in the sense that one of the goals we have in our assessment is to do two Kaizens per year. Right? Now, from there to explaining it well, to making people want to do it, I think there's still a step to take, but that's just my opinion. I think people aren't really connected to it yet, because maybe they don't really understand it, the unknown, the lack of information, right? Look, you have to do two Kaizens per year, but maybe they should say, look, do two Kaizens per year, because even for your work it's something that can help you work better. Do you understand? Communicate in a different way, perhaps.

We do that Kaizen award, but it's only for production. If you look at it from the administrative side, from the indirect side, there's nothing there. Why? Because everyone thinks that Kaizen is much easier if it's measured, right? Like, look, I used to make 10 pieces, but when I made this improvement, I started producing 20 pieces, right? We, on the indirect side, don't have this thing of, "Oh, look, now we've made this file and it's going to improve." It's not that straightforward.

**AA** This issue of bonuses, do you think that feedback, basically, and that recognition motivate more? Are they something that is beneficial to the process? Do you think it should be done in a better way?

**SI** No, I think the awards are good.

**AA** Do you think the criteria should be a little more motivating for all areas, or is it fine as it is?

**SI** Look, I'll say this, there's always room for improvement, right? But I think so, and I think there's a big difference, there are more people now.

**AA** On this issue of communication and promotion, do you think the company's leadership supports and applies Kaizen values and basically embraces them? Even the company's leadership, the managers themselves, do you think there is an embrace of the concept and promotion of it? But do you think there is alignment with Kaizen ideas?

**SI** Yes. More or less, I don't think there is that much involvement. You see who does Kaizen and you see that, that answer is there.

**AA** I think sometimes it's due to lack of time?

**SI** I think it's due to lack of time, honestly. People are always saying, "I'll do it later, I'll do it," and then... You know that in the sales and commercial team, they're always putting out fires. And then they think this is something that can be done later, and then you get to the end of the year, and they haven't done it. They didn't have time.

**AA** I've already asked this question, but do people, the workers, feel motivated to participate in Kaizen, or is it more of an obligation?

It depends on the area, doesn't it?

**SI** I think that, deep down, it's also an obligation for everyone. Because everyone has to do two Kaizens a year. It's part of the objectives, of the evaluation, so it ends up being an obligation, right? Of course, you're not going to get a bad evaluation because of that. But it's there, and it's a percentage, right? If people want to meet their performance evaluation objectives, they have to do the Kaizens. Right? It ends up being a bit of an obligation.

**SI** That's what I think people resist. Because then they say, you have to do Kaizen every year.

**AA** And what could we do about that? Is there anything that could help people see Kaizen more as an opportunity and less as a requirement, in that sense?

**SI** Yes, it has to be mandatory, because otherwise people will definitely shy away from it.

**AA** In other words, it's inevitable.

**SI** Exactly, I think so. Even so, even though it's mandatory, they don't do it, right? Isn't that right?

**AA** A slightly more abstract question, what do you think is the role... How do you think company culture affects the way Kaizen is implemented? Do you think... Is company culture sometimes well aligned with Kaizen culture? Or do you think, for example, that we are in some way linked to a Portuguese culture that sometimes doesn't fit so well with a proactive approach to improvement? What do you think about that?

**SI** I think the company culture is connected, honestly. Especially because we are now part of it. If you compare, for example, Toyota with Happybus, Toyota also has this spirit, which is really the philosophy they live by.

**AA** You could say that they, for example, wouldn't have to have this Kaizen obligation, but they do it anyway.

**SI** Exactly, for them it was already normal, exactly. I think that for the Japanese and for them it's part of the culture. I think we're still a long way off, we still resist it more.

**AA** The question, basically, is whether this corporate culture is closely linked to Portuguese culture, isn't it?

**SI** Exactly. I'll give you an example.

**SI** You know the Kaizen Institute, right?

**AA** Yes.

**SI** Right. The Kaizen Institute lives by this methodology, right? To improve the process.

And I remember that four years ago, when I arrived here at the company, they were still there. And a lot of people came here, make post-its, I don't know what, but they're implementing things they don't even know about, there it is, it's resistance, it's change. Why? Because this is not part of our culture. Whereas for some Japanese people, Kaizen is the same philosophy that they live by and want... Right? I think this has everything to do with culture and ignorance.

I'm not saying who's right and who's wrong. That's not it. But they're different things.

**AA** And how do you think we could better integrate Kaizen into the company culture or vice versa? Do you think it's just a matter of time before it eventually adapts? Or do you think there's something we can do to improve that?

**SI** I think it's time to show that the Kaizens that have been implemented so far have really made a difference and made people's lives easier, if you can say that. And maybe try to show, step by step, that Kaizen isn't just random stuff, right? It's not just because I moved the pen from the right to the left that things will improve. No, things that are really adaptable, that people look at and say, wow, this has really improved a lot.

**SI** This part about the carts, I know it's a stupid example, but I'm sure that in production, as long as they have everything in order there and in the morning the person arrives, they know that in that thing there are those screws, those ones, right? Everything in order.

I'm sure the level of production must have improved. People no longer have to go looking for things, knowing that if you're going to make X buses that day, you'll need X screws, X whatever, everything is already there in order in the morning when they arrive.

Yes, I'm sure that, look at these files we made at the time of the demonstrations, this QR code thing we did with single sheets was much better.

**SI** António, now I have to make a correction to a single sheet. In the past, you had to ask for it, correct it, then send it to print, but not now. I correct it right away, update it, and it's done.

**AA** My last question is basically a summary of all this: what can we improve in the Kaizen process of the company, of the department? What can we improve? Basically, this is everything we've been talking about.

Evaluation process, motivating people

**SI** There are always things to improve, exactly, I think it's about getting everyone more involved. Look, an example comes from management, for example, you see that your managers, oh, look, they're doing it too.

Regardless of anything else, my management also does Kaizens, right? Yes. This thing with the awards is very good. Recognizing the people who create Kaizens, saying, "Your Kaizen was wonderful, it helped the company."

**AA** Okay. Just one final note, is there anything else you want to share about Kaizen in the company?

**SI** No, I've shared so much already. I've said so much already.

**AA** That's it then, thank you.

## Appendix L – Interview 11 Transcript

08/2025

Interviewee: Subject K

**AA** So, start by telling me your name, the department where you work, how long you've been with the company? Current, in this case, to start with, and your role.

**SI** So, I'm currently a project manager, my name is Subject K, and I've been with another company from the group for six months.

**AA** Okay. And you were previously at Happybus, right?

**SI** Yes, in the sales department.

**AA** Okay, maybe now we can focus a little more on your time at Happybus in terms of your experience with Kaizen.

**AA** Basically, would you say your involvement with Kaizen was high, low, or medium? How would you define it?

**SII** I think, especially at the beginning of the year, involvement was low, and as the year progressed, involvement increased a little, but even so, I think it should have been done in a more regular way.

**AA** Okay. So how would you describe your understanding of Kaizen? Did you understand the philosophy, the concept well? Were you familiar with it?

**SII** Imagine, I was already familiar with the Kaizen philosophy because of college.

I know what Kaizen is in a theoretical environment, I just had never really applied it in a business environment.

**AA** Okay. And when was the first time you came into contact with Kaizen at the company, do you know?

**SI** Oh, at a team meeting, I think, I'm not sure when, but at a Kaizen team meeting where we analyzed how we could be more effective.

**AA** Okay, do you remember a Kaizen, a Kaizen initiative you participated in, the most productive Kaizen you submitted, do you have any recollection of that?

**SI** Well, the most productive Kaizen I remember submitting was as a team, and it was a document in which we aggregated tender documentation, clauses, and so on, that kind of technical information.

In other words, if you wanted to look up something more specific, you could go to that document, and it was much easier than looking through the array of documents that exist in the tender.

**AA** In terms of benefits, what do you think were the biggest visible benefits that Kaizen brought to the company or department you were in, your work, how do you think you saw the benefits, how do you see that?

**SI** I think the biggest benefit of Kaizen is that it allows you to look analytically at what you do and see how you can be more efficient, right? For me, I can use the Kaizen meeting blocks to look at my work analytically and realize, okay, I'm taking too long here, I need to be more efficient at this.

**AA** Would you say that Kaizen has brought about any long-term changes that you have seen since it was introduced, from when you joined the company until you left?

**SI** Well, I didn't spend that much time at the company, I don't remember seeing any extraordinary changes, I was there for a year and a half, so I don't think I'm very familiar with that question.

**AA** Do you think Kaizen is useful in an office context, or should it only be applied to production?

**SII** I think it's useful, but I think it should be done more regularly in production than in the office.

**AA** Even if it's useful in an office context, do you think it's accepted in the same way? Do you think it's accepted in the same way by production and administrative workers, in the way it's done, in terms of criteria?

**SII** I think it depends on the person. I think there are people who are very open to it and others who are not. I don't think it depends on the job, I think it really depends on your spirit of, I don't know, wanting to understand new things and...

**AA** But do you think that the system, the way Kaizen is implemented at Happybus, is designed to be more practical at times, not so much administrative? Do you think both are accepted in the same way?

**SI** Are you talking about how it's implemented in production and how it's implemented in the office? I think it's implemented more seriously in production, so to speak, because in production you can see results right away, practically, I think it also comes a little bit from there.

**AA** Regarding resistance, because this is basically a thesis that focuses on resistance to the implementation of Kaizen, what do you think are still the biggest

challenges, in this case to the implementation and maintenance of Kaizen, of the Kaizen philosophy in the company or department?

**SI** I think it's really our mindset, sometimes, deciding to see if there's change, because I see that myself nowadays, that you're detecting that there's a problem there, you know the solution, and sometimes the people involved with you don't want to change the way they do things, because they've been doing it that way for a long time and that's the way they should do it, and things are constantly changing and constantly improving, and we have to be constantly improving, but I really think it's the mindset.

**AA** So, would you say you've seen colleagues resisting the Kaizen initiative?

**SI** Yes

**AA** Do you think this has to do with a question of mindset, the fact that sometimes you think it's a lack of time, priorities, motivation?

**SI** Okay, there may also be a lack of time, yes, because sometimes you are so focused on these day-to-day tasks that you really don't have time to analyze what needs to be improved, what is failing, what is not working. That may also be the case, but I think it's also due to this resistance.

**AA** Do you think Kaizen is well communicated and promoted by the company? Do you think it's something the company is committed to promoting?

**SI** Imagine, when I joined, it was clear to me that this was a philosophy that was embraced.

Now, the regularity of meetings and so on, that depends on each team, and, well, that varies. But I was aware that it was something.

**AA** Do you think that, in this context too, do you think that the leadership, the company's leadership, or even your managers, support Kaizen, support Kaizen practices, and instill Kaizen submission? Do you think that happens, or do you think that sometimes there is a little room for improvement?

**SII** think it should be more regular, I think Kaizen should be something like every x amount of time, preferably not too long, meetings, checking the data, seeing what can be done, what can't be done, and that's it.

**AA** Did you feel, for example, that your managers could motivate you a little to do it, but they themselves didn't set a good example? Did you feel that was the case?

**SII** think, in my case, it was really a lack of time. We had a lot of work and couldn't hold Kaizen meetings. And I think the fact that they also implemented that annual limit, for example, now we don't have it and we've even been doing more because we don't have that pressure, basically.

**AA** Yes, I see. Do you think that, basically, the Happybus employees, the people you interacted with, yourself, did you feel motivated to participate, or was it more of an obligation because of that limit or that minimum Kaizen you had to submit?

**SII** would say half and half. Sometimes you were motivated. Other times, I knew it was because I had to, because we had that limit in place.

**AA** A slightly more abstract question, but anyway, I'll try to explain. Do you think that the company culture affects the way Kaizen is implemented? Do you think that the company culture, imagine if they were more demanding in some things, do you think Kaizen could be implemented in a different way? Do you think it might even have something to do with Portuguese culture sometimes?

Or do you think that Kaizen culture is well identified with the company and works in a common way across the board?

**SII** don't think I quite understand what you mean. What do you mean by company culture?

**AA** Company culture in the sense of our practices, our way of being, our way of working.

Do you think this fits in with Kaizen values? Do you think that sometimes our way of working and our way of being, deep down, because every company has its own way of working, has a little bit to do with Portuguese culture? Do you think this affects the way we implement Kaizen? Do you think that sometimes we should be more absorbed by the Japanese Kaizen culture, a little more demanding in some aspects?

**SI**Yes, maybe so. We could be a little more involved, but I think it has less to do with the company culture and more to do with the Portuguese work culture found in Portuguese companies.

**AA** Do you think it's a more general thing?

**SI**Yes, I think so.

**AA** What do you think would help us see Kaizen more as an opportunity and not so much as a requirement? Do you think it has to do with the criteria we can use to evaluate it?

**SII**Imagine, as a requirement in that sense, having to present X Kaizens per year, I don't think so. I think it should be seen as a requirement, like, once a week you get together and analyze the data and see. We have an opportunity to improve

here, let's set a deadline and see if we can reduce this, or whatever it may be. I think there should be some kind of structure, but not so much as a requirement.

**SI**In other words, this is an opportunity and not something you have to do because you are obliged to.

**AA** What role do you think feedback and recognition play in continuous improvement, even in the Kaizen process? Do you think we are sufficiently recognized? Do you think that's important?

**SI**Is it important to be recognized for your Kaizens?

**AA** Do you think it motivates you, do you think it should be better?

**SI**I think so, I think if you have good Kaizens you should be motivated by that, I don't know if that happens very often.

**AA** Several people mentioned the part about having gold Kaizens, you have several monthly awards, but do you think that's enough? Can we do more?

**SI**I don't know if the criteria for analyzing these Kaizens are that well defined, but I think there should be motivation for you to be doing this, yes.

**AA** Basically, what do you think we can improve in relation to Kaizen, based on your experience in the company? I think it's a little bit what we've already talked about here around the topic, but do you think that the evaluation, we can improve the evaluation, we can motivate people a little better, do you think it's around that?

**S**I think so, I think it's really motivation and, I don't know, leading by example. For example, you have the initiative to do Kaizen, right?

**A**A Yes, for a final note, is there anything else you would like to share about your experience with Kaizen, or have we covered everything?

**S**I Everything has been shared.

## Appendix M – Interview 12 Transcript

08/2025

Interviewee: Subject L

**AA** Okay, to start with, tell me your name, the department you work in, how long you've been with the company, and your current role, in this case.

**SI** My name is Subject L, and I work in the Planning and Distribution Department and Sales Division at another company from the group of Happybus. I have been in this role for six and a half months.

**AA** And before that, you were at Happybus working with Kaizens, right?

**SI** Yes, I was at Happybus before, in the Customer Service Department, as a Key Account Manager, but I was also the Kaizen Pivot for the department. And here I am also the Kaizen Pivot.

**AA** Let's focus a little on your experience at Happybus. Okay, at Happybus. How involved were you with Kaizen? Would you say it was high, medium, or low?

**SI** It was high, I was the one who managed and submitted the department's Kaizens to the Kaizen Department.

**AA** Okay, so would you say that your understanding of what Kaizen is would also be quite high in this case, right? The philosophy and all the involvement.

**SI** Yes, I had to have a high level of knowledge to be able to submit and analyze the ideas of my colleagues in the department.

**AA** What was your first contact with Kaizen at Happybus? Do you remember that, or your first contacts in this case?

**SI** I, Kaizen pivot, have only been at Happybus for the last two years. I always had contact with Kaizen, from the beginning, because we had to submit ideas. But in the last two years that I was at Happybus, that's what I dedicated myself to the most.

**AA** Okay. Can you give an example of a Kaizen initiative you participated in, a more productive Kaizen you submitted? Do you have any idea of something that was more relevant?

**SI** Yes, in addition to submitting Kaizens from the Department and my own, I also participated a lot in Kaizens at the production level, as a result of my role as Key Account Manager. So, many of the Kaizens that were submitted were silver Kaizens, or one that I had, which was my first gold, which was a Kaizen on a safety issue related to the transport of Scania chassis from level 1 to level 3.

**AA** You have to explain a little bit about this gold and silver process, because we are assuming that I have no idea what that is.

**SI** So, we have individual Kaizens, then you have bronze, silver, and gold Kaizens.

**SI** It has to do with the Kaizen scores, and at Happybus it was very much related to saving money or safety. This Kaizen was a gold Kaizen because, in terms of safety, we were able to safeguard the safety of those who maneuvered the chassis. It has to do with the Kaizen score level.

**SI** I can't say off the top of my head, because when you filled out the form, it automatically did the calculations for you, but it was very much related to the

fact that, from a certain score, it was bronze, from another score it was silver, and then gold.

**AA** Okay, that adds a little value and motivation, maybe it motivates people to submit more Kaizens.

**SI** It does motivate, especially because when it's a gold Kaizen, there's a monetary value that the employees who were involved in the Kaizen receive.

**AA** It creates a certain recognition, doesn't it?

**SI** Definitely. Usually, at the annual meeting with the Kaizen group, the gold Kaizens are mentioned, and from all the gold ones, the one that really had the most impact is chosen. That wasn't the case with the one I was involved in.

**AA** It always has an impact.

**SI** Exactly, but it always has an impact, and even the silver Kaizens or gold Kaizens have to be approved by the Executive Committee. So, I would say that it goes to the level of approval by the Executive Committee.

**AA** Regarding benefits, from your perspective, what do you think was the most visible benefit that Kaizen brought to the company while you were working directly with Kaizens? Waste reduction, something more specific?

**SI** At the company level, I can't tell you exactly what the benefits were. At the department level, we noticed that there was an increase in encouragement from colleagues to participate, even to get recognition for the daily work they did. Even though they were administrative Kaizens that didn't have that score, right? Because Happybus' Kaizen structure is more focused on scoring related to saving money and safety in production, rather than administrative Kaizens, but we

noticed that there was also a kind of appreciation for submitting Kaizens to the evaluation of our daily work to make our work faster, flawless, defect-free, all in the interest of greater productivity and customer satisfaction.

**AA** Okay. So would you say that these advantages were basically long-term changes that you were able to observe? Do you think that this introduction, this greater promotion of Kaizen in the long term, brought about greater productivity, perhaps?

**SI** Without a doubt, without a doubt.

**SI** In terms of productivity and service quality, based on feedback from company departments, the company in general, and our customers, the Kaizens that were submitted and approved undoubtedly gave us more time to focus on other situations and not be so tied down there. In other words, all the processes involved in Kaizen allowed us to become more proactive, more productive, and of course, this brings advantages in terms of working hours, for example, dedicated to that task. With Kaizen, with the reduction and implementation of a process, we had more time to deal with other situations.

**AA** Do you think Kaizen is more accepted in an office context? Should it only be applied to production? What do you think about that?

**SI** From my experience at Happybus, I would say that 99% is directed at production. The system implemented there is direct. This was very evident in the scores of the administrative Kaizens, which were more closely linked to the sales department and not only to the sales department. For example, imagine that we saved 2,000 hours by implementing a process, but that saving was not the same as, for example, submitting a Kaizen that saved 5 cents on a car.

**SI** And comparatively, even in terms of savings in hours at the administrative level and savings in hours in production, even in terms of accounting, there was a very large gap. Therefore, there is no doubt that what is implemented at Happybus is geared towards production.

**AA** In other words, it is more accepted because it is more focused on the production area, in this case. But it would be useful if it were applied more, if it were more focused on the administrative side, in a certain sense, wouldn't it?

**SI** Also, it was a battle I had, and during those two years, it was a battle I had every month at meetings, where I would say, because a lot of the things I heard from my colleagues were like, wow, I saved 2,000 hours of work here and it's an individual Kaizen, and they save an hour in production and it's already a silver Kaizen.

These things made the people who were submitting Kaizen a little demotivated.

**AA** Do you think that sometimes, in the administrative context, Kaizen was seen a little more as an obligation than as something that was necessary, that was more voluntary, sometimes more like an obligation?

**SI** Without a doubt, because at the beginning of the year I would do the survey and say, okay, in order to meet the goal, you have to present two kaizens per year. And they would do two kaizens and say, okay, it's done, it was really that obligation. Not me, I always had many more kaizens, I always presented many more, but also because I was very connected to the production line and made a point of always being on top of things and cooperating with other departments on the production line, so I ended up having many more. But there's no doubt that the fact that the Kaizen policy adopted at Happybus, is more focused on production than on administration, means that people just do the minimum and that's it. It's mandatory, so they do it and it's done.

**AA** And what do you think we can do about that? What could be done to make people see Kaizen more as an opportunity? Especially in this context, perhaps administrative, right? Would it be a change in criteria?

**SI** Definitely the scoring and evaluation. The scoring starts with the Kaizen scores, right? And then there's the evaluation itself.

So the scoring and evaluation of kaizens end up being interconnected. The entire structure of this scoring and evaluation would have to be reevaluated in order to implement it and create more motivation at the administrative level.

**AA** The main point of this thesis is based on whether or not there is a culture of resistance in companies to the implementation of Kaizen. My question here, to begin with, is what are the biggest difficulties we still have in implementing Kaizen at Happybus? What we had perhaps in the initial phase, basically the difficulties we still have. What is the biggest challenge still facing the implementation of Kaizen?

**SI** People's mindset, people accepting Kaizen not as an obligation, but as a tool to make us more productive in our daily lives.

**AA** Do you think this might have something to do with the culture of older people, who are more accustomed to a certain way of working, or is it more about the method than the people?

**SI** I wouldn't say it's about age. I think it has to do with people's way of thinking. I often heard, "Oh, I have to work, I don't have time to do Kaizen. I have to work." And I tried to show them that sometimes by doing Kaizens we could work better, more, and better. And that's what I tried to show them. Because I often heard them say, "Oh, I don't have time to do Kaizens because I have to work, I have a lot of work." And there you go, if you come up with that philosophy that I don't have time for Kaizens because I have to work.

But maybe if we lose 5 minutes there, we'll be able to improve productivity in an hour or two. That was the mindset, now, at the time I was with the pivot, that was it.

It was trying to get the older employees, who had been there for many years, to understand that Kaizen is something that can help us, it's not a waste of time. It's something that can help us improve the way we work and be more productive.

**AA** In other words, that also answers my next question, which was whether you had ever seen a colleague or yourself resisting a Kaizen initiative for some reason.

**SI** They always resisted. In the first year, there was always resistance, always at the beginning of the year.

**AA** Don't you think this has anything to do with cultural issues?

**SI** Yes, it does. It's a mix, of course, because I had more resistance in the first year, but then in the second year I didn't have as much. I saw them more motivated, although it was always minimal, never that motivation to do more.

But that is also the role of the pivot. The pivot has that role. They have the role of always being attentive and saying, look, that's a Kaizen idea.

We are always there to motivate them, because they don't have that way of thinking on their own.

**AA** If you think Kaizen is well communicated and promoted by the company, if you think it is a promotion in the sense of motivating people about Kaizen, in this case, or could it be done better?

**SI** I believe there is always room for improvement, and I believe it needed to be more... The motivation there involved a reformulation of the evaluation and scoring process. And also, one thing I felt was that there was no training on Kaizen, showing what Kaizen is, explaining what Kaizen is. Everything I learned

was what I sought out myself. They told me about the 5S, and that was it. And then there was also transparency. The fact that you couldn't, that there wasn't that transparency, of knowing why there was so much disparity between the scores of an equivalent Kaizen, in terms of, for example, monetary value. So much disparity in the scoring because it was an administrative Kaizen or a production Kaizen. There was never that transparency.

**AA** Do you think leadership supports Kaisers values? Leadership itself, company leadership, or your own leadership, in the sense of individual managers? Do you think there is support and attention to what Kaizen is? Or do you think that sometimes there is an environment where there is a lot to do and there is no time and no way of being?

**SI** Honestly, I had a lot of difficulty getting managers to submit Kaisers. In fact, they always left them to the last minute. And this was also due to the level of work they had. I don't think it was because they didn't want to do it, but because the volume of work didn't allow it. In the years I was a pivot, I was really encouraged by our managers to do it more and show them. They liked that I even sent that email every month to encourage everyone and get the office folks talking and moving around a bit, I don't know what. So, in fact, there is this policy and encouragement, but on the other hand, the workload often didn't allow them and their colleagues to take, I don't know, a week or an hour to do Kaizen, for example.

**AA** This is also a matter of organization, isn't it? I need to set aside some time for that.

**AA** Do you think that company culture affects the way we work with Kaizen, in this case within the company, even within the department, but do you think that company culture... if we were more demanding in some areas, could we do Kaizen differently? What do you think about that? Do you think it's a Portuguese

issue too? Do you think it's a Portuguese culture that sometimes clashes a little with Japanese culture, in this case Kaizen?

**SI** No, it doesn't clash. Look, the whole group is very focused on Kaizen and geared towards it, and now that I'm at another company in the group, I see a different reality. I believe that, in terms of Happybus, it's really about scoring and appreciation. Happybus is very focused on Kaizen, implements it, encourages it, which is why there are also QCCs and so on, not just Kaizens, but also QCCs and the incentives that are there.

They could be a little more flexible, this reevaluation.

**AA** Isn't it all about culture, in this case?

**SI** Without a doubt, without a doubt. And I think they've stagnated a little. They did it, it's implemented, and they've stagnated a little. But that also has to come from the company's Kaizen department team, proposing new improvements and changes and other solutions.

**AA** How can we improve Kaizen at Happybus? I think we've covered everything in terms of valuation and scoring.

**SI** Without a doubt, in my opinion, I think Happybus' Kaizen department would benefit immensely from talking to other companies in the group and seeing how the culture and mindset regarding administrative Kaizens is implemented and learning, absorbing that experience and what is done in other companies in the group and bringing it to Happybus. That's really what's missing. And also, without disparaging the people who are there in the Kaizen department, their work is excellent, but they need to be a little more open to suggestions for improving Kaizen itself, the scoring and valuation structure itself, and not be so closed-minded, saying "it is what it is and we're not going to change it now." But that requires them to listen to and accept feedback from the pivots who deal with

this on a daily basis with the rest of their colleagues in the department. For example, I think that exchange of emails saying "how did you save I don't know how many hours here" is counterproductive; we have to constantly justify ourselves.

**AA** This ends up being demotivating, doesn't it?

**SI** It ends up demotivating people and making them give up. They give up, saying, "Look, I'm not submitting anything anymore, I don't care anymore." Okay, that's where it starts, it was Happybus' Kaizen to talk to the other departments.

**AA** being more cooperative and less confrontational in that sense.

**SI** Without a doubt, without a doubt, it seems that we had to justify ourselves, it was an impressive thing, this ended up demotivating those who were submitting a little.

Imagine, the role of the pivot, and I was there in the middle and would see that, but now imagine that you are a person submitting an individual Kaizen that you see, but why did you do this? But why did you save this? But how did you arrive at this number? Often, people would end up saying, "Oh, I don't want to know about that anymore." So, I'm very interested in seeing what others are doing.

**SI** has to improve. I have experience at Happybus, I have experience now here at my new job, and it's completely different, completely different.

**SI** In terms of administrative Kaizen, it's completely different, so I think it would be hugely beneficial to absorb what is done in other companies in the group with regard to the administrative side of Kaizen because it would certainly motivate the administrative departments at Happybus to submit Kaizen.

**AA** Okay, one final note, we've talked about everything, but if there's anything else you'd like to share about Happybus, or have you already shared everything?

**SI** No, it was rewarding for me, I really enjoyed it. Initially, I was a little anxious because this was going to be a lot of work and I knew the audience, something I had to deal with there, but no, they surprised me and I managed to motivate them and it was very rewarding and completely changed my way of thinking and seeing the Kaizen culture.

So, it was super rewarding, and I am eternally grateful to those who decided to put me in the spotlight and believed that I was capable of playing that role and did it well. It was super rewarding, without a doubt.

## Appendix N – Interview 13 Transcript

08/2025

Interviewee: Subject M

**AA** Okay, to start with, I'd like to know your name, the department you work in, how long you've been with the company, and your role.

**SI** My name is Subject M, and I currently work in the continuous improvement department. When I took on new responsibilities at the beginning of this year, I was already in the department, but it was at the beginning of this year that I started, so to speak.

**SI** I've been with the company since 2017, so I'll go back a little bit. I've been with the company since 2017. I'm a process engineer, and until three years ago, if I'm not mistaken, I moved on to continuous improvement, but more related to jishuken activities, and this year I moved more into the Kaizen side of things.

**AA** Well, then I would say that your involvement with Kaizen is high.

**SI** At the moment, yes, everything related to Kaizen goes through me, so to speak.

**AA** And your understanding of what Kaizen is is also quite high then.

**SI** Yes

**AA** Okay. So, when did you first come into contact with Kaizen at this company? Do you remember?

**SI** It was right at the beginning, when I joined. When I joined, Kaizen was something that had been around for quite some time in the company, and I learned about it right from the start.

In fact, I already knew about it from where I worked before, so to speak. I already knew what it was. Before that, I was at... I don't know if you're interested.

**AA** Oh, that's how it is. If you want to share, that's always good.

**SI** I used to work at TECAP in New York, and that's where I first came into contact with it, so to speak. I was there for about two and a half, three years, if I'm not mistaken.

I already had some knowledge, I already knew what Kaizen was, how the idea of Kaizen works there, I already had that notion. More from the perspective of the person who implements it there, right? Not from the organization's point of view or anything like that, but from the common user's point of view, so to speak.

**AA** Yes, that's interesting, it's important, yes.

**SI** That's where I had my first contacts. Then when I moved here in 2017, when I joined Happybus, I already had an idea of what it was, but I immediately had contacts, because it was something that had also existed here in the company for some time. So it's been since then.

**AA** Okay, and can you give us an example of a Kaizen initiative or one she has participated in, a more productive Kaizen, an experience, an example of a Kaizen initiative, perhaps even one she has managed, that has stuck in her memory?

**SI** I don't know, I've done several, over the years I've done several kaizens. Perhaps the most interesting one, for the first time it may not be anything special, but for me I found it quite interesting, was in an activity, a jishuken activity, where we implemented a box for the operator, so to speak, where the operator,

before starting the task, would take all the materials, put them in that box, which was already prepared, and then perform the task. I found it interesting in the sense that it optimized the process, the task, and time, and it also helped a little to avoid errors, perhaps something more operational.

**SI** It was one of the kaizens that I probably remember the most. But I did others.

**SI** Because I also spent a lot of time involved in process engineering, and I have this tendency to look at the most productive, most operational side of things. I have that perspective, so to speak. Even today, despite being more involved with the Office, I still have that tendency to look at things in practical terms, operational terms, so to speak, because I really spent a lot of time involved in that.

**SI** But I did other kaizens, there, more Office, file optimization and all that, more and more.

**AA** Yes, I believe so, different perspectives, as a user and as a manager, basically.

**SI** Exactly.

**AA** Okay, regarding the benefits, here's a slightly more general question, but what are the most visible benefits that you think Kaizen has brought to Happybus specifically?

**SI** I think it was getting people to look at their work. I think it was looking at their work and optimizing it, how to optimize it. Looking at things more critically.

**SI** But also, I think that's it, people start, they automatically look at things and see, this could be better that way, this could be better that way, if we did so much

in operational terms, if we got a tool or something else, this could be faster, or easier to do. Or in office terms, people look at files, look at papers, and try to avoid that. Optimize files in order to streamline processes.

**SI** I think that's the biggest gain from Kaizen. People now look at things with a critical eye.

**AA** I think it's people's mindset too.

**SI** Yes, yes. Kaizen is a tool for exactly that. Here we have direct gains, time gains, productivity gains, and everything else, but it's also very cultural.

**SI** It's about making people think, making people look at things critically and see better ways of doing things, faster ways. Okay, this happens automatically. Without thinking about the purpose of Kaizen.

**AA** Do you think Kaizen is useful in an administrative context, should it only be applied to production, or is it useful in the context we are in?

**SI** It's useful everywhere. There you go, because of this critical sense. For me, it applies everywhere.

**AA** And do you think that, being useful in an administrative context, it is more accepted in a production context, sometimes because it is more practical?

**SI** Maybe it's more visible, more tangible in production. And that's normal, because you see things happening in an assembly process. We change the assembly process, we get a tool, we see if the task is performed more simply, or more easily, or more quickly.

It's tangible. In the administrative sector, it's not so straightforward. And sometimes people think it's not so useful because it's not so tangible.

**SI** And not so easy to measure either. The question of quality, so to speak, at the administrative level, we do our job better, but how much better? And quantifying this is not easy, and that's why it's not so visible.

**AA** But it may be more difficult to motivate people, perhaps.

**SI** Yes, exactly because of this, because it's not visible. It's not so easy to measure. And I think it's a little more like that. It often leads people to become more demotivated. In the office, they become a little more demotivated, they don't have this thing of doing Kaizen, a little bit like that, because you can't see it. Much of the work in the office, there you go, is not visible.

**AA** Earlier we talked a little about the benefits, but in terms of resistance, what do you think are still the main challenges in implementation? There you go, people's demotivation, sometimes a lack of time?

**SI** The reasons are lack of time, or, in the case of our company, we value it, we give awards, if it doesn't give points, then it's not worth doing.

What I often notice is that they actually do things, but they don't record them. Why? Because it's not worth it, because it doesn't earn points, it doesn't earn rewards. That doesn't mean they don't make improvements.

**SI** They often make improvements, but they don't bother to record them.

**AA** So the role of recognition and feedback, in this case, is relevant in terms of demotivation?

**SI** Yes, it helps a lot. On the one hand, we have the problem, but on the other hand, it can lead to the greed of always wanting to be at the top.

There you go. We have our system in place in terms of kaizens, the greed of wanting gold because it's really more valuable. On the one hand, it leads to that, but on the other hand, it also leads to people participating.

**SI** Since we have goals to achieve, well, okay, it's a way of... Look, I need to submit kaizens, well, I'll make the effort, let's do it. Let's think about this a little, let's do it and then record it.

**AA** Do you think, for example, that the difficulties we sometimes still have in implementation, or in submission, can sometimes have to do with a certain mindset? The way of thinking, sometimes people work in a certain way, and trying to get people to work in a different way can clash a little with people's mindset, older people, sometimes, it can happen.

**SI** Yes, yes, that happens a lot. There you go, people are used to doing things a certain way. That's why one very important thing in Kaizen is getting people involved. People have to feel that it's really theirs, that that improvement is really going to improve their work. And they have to be involved in some way. That's very important.

**SI** If it's out of obligation, if it's because it has to be done, it's difficult. And older people often don't say no to work. But we're back to what I said earlier. And now, they often make improvements. Often, they don't say no to work, they're resistant.

**AA** Have you ever seen any colleagues who have resisted Kaizen initiatives, in the sense of people who are more resistant?

**SI** That's visible. Yes, yes, yes. It happens. It happens a lot. It happens a lot. Then the person who wants to implement it is often forced to go around the issue. They have to go around in circles to get the person to really understand and see

it as an added value. People have to feel that it really is an added value. But you have to go around in circles to achieve it, then implement it. If it's by proposition, it's not worth it. I honestly don't think it's worth it, because it may last for a while, but it will eventually fall apart. After a while, it will eventually fall apart.

**AA** It has to be consolidated a little in people's minds.

**AA** I have a question to ask, more for you guys, because you're the ones who have this idea, we don't have many here. Is there any department that is more resistant to the initiative? If there is... In this administrative context, there may be more resistance, but are there departments that are more resistant than others?

**SI** Yes, there are some departments that, at this point, now that we are at the beginning of September, have not had any cases reported so far, for example.

**SI** When they say yes, they are administrative staff.

**SI** Because, as I mentioned earlier, administrative work is not visible, it is not as tangible. It is difficult to quantify. So, they will never have silver or gold kaizens, or it is more difficult. So, they think it is not worth the effort to record them.

**AA** Okay. Regarding culture and motivation here, do you think that, in this case, leadership or management believes that there is some support from the company for the values and Kaizen itself, does that happen actively?

**SI** Yes, yes. And you can tell when management is really more interested, so to speak, or really more attentive, and pushes employees more than those who are not so focused on it, so to speak. You can tell.

Management has a lot of influence. A lot.

**AA** Because sometimes there are people who complain that their own managers, or even higher-ups, don't do Kaizen, that is, sometimes they don't motivate as many people, or sometimes there's a bit of that idea

**SI** You can tell, but you can tell clearly. You can clearly tell which managers are really more involved, who are aware and who really push those who are not.

**SI** If they themselves don't value it, if they themselves say it's not worth it or a waste of time, so to speak, if they talk like that, the people below them won't do it.

**AA** It's a matter of setting an example, isn't it?

**SI** Exactly.

**AA** We've already talked a little bit about this issue, haven't we? If people are motivated to participate in kaizens, I don't know if it's more of an obligation, but it depends a little bit, doesn't it?

**SI** It depends a little. There are two situations. There are both situations. There are those who really understand that it's beneficial and are motivated, and others because, well, we have goals to achieve, right? That's right. But it's all part of it, so to speak.

**SI** But one thing I always say is that we may have many kaizens that are weak, so to speak, kaizens that are only there to achieve goals, but among these many kaizens there are always many good ideas. Imagine, we have 100 kaizens that are just for show, for participation, but among these 100 kaizens, there are surely others that really add value, that really are an improvement.

**AA** This question here is a little more ambiguous. How do you think the company culture affects the way we implement Kaizen? Do you sometimes think we could be more demanding and do better kaizens?

**AA** Do you think it has to do with a certain Portuguese culture that may clash a little with the original Kaizen culture? How do you see, ultimately, the way we apply a philosophy from a culture that is not our own? How does that affect us?

**SI** This, of course, is something that has to be done in the long term and has a lot to do with changing mindsets, so it's not easy. It's something that isn't ours, deep down, and sometimes instilling this rigor, so to speak, in Portuguese, isn't always easy. The rigor of thinking about things and recording them is not easy. This, again, is a long-term process, it takes time, and it is very much a cultural change.

**SI** Is it easy? No, it's not easy. It's not easy. It's something that happens gradually. It doesn't happen overnight. It's not a case of someone arriving here and saying, look, in a year's time, I want everyone to be doing Kaizen. It's a long-term process.

**AA** Sometimes, some adaptation is needed in cultural terms.

**SI** Yes, yes. And even if this side here, so to speak, tries to push for this, which is Kaizen, trying to implement it and get people to do it, often you have to take a step back, okay, it's not working well here, I'm going to take a step back and do it differently, try to reach people, you often have to do this.

And you have to realize that it's a long-term thing.

**AA** What can we do better? How can we improve the way Kaizen is implemented? How can we motivate people better, perhaps? Some people talk a lot about evaluation, whether it could be improved in some way, I don't know...

**SI** Maybe, something like that. But maybe it's time to take a step back and adapt, try to meet people halfway.

The system we currently have has worked well for some time, but perhaps now is the time to adapt. This is about people, this is for them, so we have to meet them halfway somehow. And I think that's probably what's needed here right now.

**SI** It's about listening to people and trying to meet them halfway, without forgetting what's behind us. Not disregarding what's already behind us, what we've already achieved, but adapting, meeting them halfway. And that's the issue of evaluation, yes, it's one of the topics on the table right now, that's exactly it.

**AA** That's basically the issue, as far as we can, because ultimately, even Kaizen is a process under construction, it's improvement.

One of my questions for the future was exactly how we can get people to see this as an opportunity and not as a requirement. It fits in a little with that question, how we can improve. Gradually, by listening to people.

**SI** Yes, above all by listening to people. It's assuming that this is for them. And this has to be, in fact, an added value as well.

**SI** Kaizen is a consequence of improvement, not the other way around.

**AA** Yes, yes, of course, it's important that we always strive to improve, even in the application itself.

**AA** And it's interesting to interview those who deal with the submission, but also those who deal with the whole process, it's interesting, they have different perspectives.

**AA** Okay, just one final note, if you would like to share anything else in terms of her experience with Kaizen.

**SI** Kaizen is a consequence of improvement, and what we should always encourage is improvement, continuous improvement, and always doing better. Okay, and Kaizen comes as a consequence of that, basically that's it.

**AA** Okay, thank you.

## Appendix O – Interview 14 Transcript

08/2025

Interviewee: Subject N

**AA** Okay, let's begin. Please tell me your name, department, how long you have been with the company, and your position.

**SI** As of today, I'm in the Standardization and Cost Reduction Department. I've been here for six years and I don't know how many months, almost seven years with the company.

**AA** Okay, and basically, before that, were you directly involved with Kaizen?

**SI** I've been implementing Kaizen since the beginning of 2019. There had already been some initial things, but nothing too strong. Then I was implementing Kaizen until last year, until the end of last year.

**AA** Okay, so I would say that, perhaps, we focused a little bit on the time when you were more involved with Kaizen. Would you say that involvement with Kaizen was high then?

**SI** Yes, for day-to-day, yes.

**AA** Okay, basically there was a great understanding of what Kaizen is, there was a great connection. I always ask this question, but for those who are very connected to Kaizen, it becomes a little redundant, because if the person understands well what Kaizen is, but in this case.

**AA** What was José's first contact with Kaizen at this company, do you remember?

**SI** On the first day, as soon as I walked in.

**AA** Do you remember anything, any contact with Kaizen, any Kaizen initiative you participated in that was more relevant?

**SI** On the first day, I participated in an activity, a training course called QCC.

**AA** Over time, has there been any more productive Kaizen that you have been involved in, anything you would like to share that has been relevant in terms of implementation?

**SI** Yes, I have to implement everything, I have to implement everything, I have to implement the teams, implement the frameworks, motivate the teams to make implementations, to improve day-to-day, to record. I had to create the file where you make records, I had to create the methodology for how it is analyzed, I had to create the methodology.

**AA** Yes, but I imagine it's a little different, because basically the people I've been talking to are all very connected to Kaizen, but it's mainly through the submission of Kaizen, you're more connected to the coordination of the whole activity, also the criteria, right? The evaluation, or at least that part.

**SI** Yes, also. But that only came about, the evaluation criteria only came about a few years later. We initially started to have some criteria, some things that we came to consider in order to distinguish Kaizens, and the criteria came about in 2022, if I'm not mistaken.

**AA** How did it work before?

**SI** It worked the same way, except you didn't have points, you didn't have awards. And from the moment you start involving money, you have to have things mapped out. In the past, you simply looked at the money that each Kaizen had returned and did a bit of an analysis, what people had found most valuable or not. Once you start wanting to give rewards to get more involvement and recognition, you have periodic recognition, and from then on you have to structure something, which may not be perfect, but it's structured and has rules.

**AA** And would you say that, before we had this evaluation, people were less motivated?

**SI** No, on the contrary, they were involved.

**AA** On the contrary?

**SI** Yes, the motivation for Kaizen was not the same.

**AA** Even without this appreciation?

**SI** If you look at the evolution, anyone who sees the evolution over time can see that this was not what made the impact. It simply added something that is what Kaizen aims to do, which is to develop people, OK? And once we had all these valuations done, people started asking questions. And well, no problem, we have to be open with each other to answer those questions and be aligned. What was not a concern for some, through Kaizens we started to give that visibility.

**SI** And today, people are more concerned about safety than ever before, and regardless of whether it's Kaizen or not, the truth is that the number of workplace accidents has decreased in the company. So today, we all know what a risk level is. A few years ago, it was unthinkable for us to talk about risk levels in safety, and everyone was afraid to even present to people what a safety risk level

analysis is. Today, everyone knows that we have various types of defects, and that was the main thing we gained. Although some people think that I am administrative, that I can't do this or that, that is all wrong.

**SI** Because we can all add something, and the focus of Kaizens is not on scoring at all. It's on development, on me getting to know other areas, on me thinking beyond what I'm doing.

**AA** I had a question here that is what are the most visible benefits that Kaizen has brought, and that's one of them, isn't it? That perception of safety.

**SI** People's development. The biggest advantage that Kaizen brought was that people became aware of what happens with everything in the company and how things are evaluated.

**SI** As long as people think, when they look at it, they say, hey, this has a safety risk. Oh, this has a quality defect. But is this a defect that is worth investing in or not? We may receive complaints administratively.

Look, the customer is complaining about this type of defect. Okay, what priority am I going to give it? I have a lot of work to do. Is this a priority or not? And I already know how to evaluate it.

Many people already think this way with Kaizens. Look, this is a critical defect. I'll deal with this one first.

**SI** Because if it's a critical defect, it means that the safety of passengers or our colleagues at work is at stake. And so, I have to give priority to this one. I'm not going to give priority to a risk that appears on a panel, which is a simpler defect.

**AA** Right, critical thinking, isn't it?

**SI** Right, we develop critical thinking in everyone. And it's good to discuss it, even though some people get upset and many think that everything is wrong and that this or that could be changed. Okay, fine.

As long as they suggest how and when, everything is fine with us.

**AA** Yes, considering what was there before and what is there now, it's clearly an improvement.

**AA** Okay, I had another question, which is related to what we were talking about, but is Kaizen also useful in an administrative context or is it basically more useful in a production context? What do you think about that, José?

**SI** I think In our reality, it's much more useful administratively. Because production acts and we are the ones sending the problems. In other words, the root cause is always on this side.

Down there, they are applying it. They are not developing it. They are not defining procedures.

And we often think that the fault always lies with the other side and forget that things have a root where they begin. If I have poorly developed raw materials, if I buy a type of iron that is not of good quality, then I can't say that it's down there that they're assembling it badly, can I?

**SI** And if we look at the company's figures, we see that the administrative burden is increasing, so the impact that the administrative burden has on a bus is much greater than a productive one, so the administrative burden has to be optimized and the correct information has to be sent.

**AA** What many people say in these interviews I'm doing is that they think being in a production context is more practical, that is, it's easier to implement some changes sometimes. And sometimes it's more accepted, it can be more accepted in a production context than in an administrative context.

**SI** It may be more accepted, and it is more accepted by people's development, because from the beginning, if we look at it from the perspective of continuous improvement in the company, the production area was an area that felt the pain, always saw advantages in continuous improvement, regardless of the points or not, before all this, right? And the other areas wanted to be left out.

**SI** Because, unfortunately, in the past, I think there were some... there were some companies and such, and things didn't go well. Some consulting companies.

**AA** The Kaizen Institute?

**SI** I think that was in 2007 or 2008. At the time, they all complained a little about it. And the administrative department always ran away. Let's say, "this is not for us, this is not for us, this is not for us." And the others saw the advantages earlier. Okay, did the production area have more advantages? Because they opened the door for us, because they accepted things, and we started to involve the production area earlier.

**SI** And what does that lead to? We say, ah, it's easier to implement in the production area. Yes, because we get there and their mindset is already developed in a different way, they accept things, OK? And they already see things differently and can apply them more easily. When we go to the administrative area, we often still debate with, okay, some issues that people don't want, there are many people who still want to be... In the administrative area, we have to look at our challenge as developing people.

**SI** In other words, in order for me to evolve, I have to have someone to replace me. And often we don't see that, right? We see that knowledge has to be with us, we don't want to pass it on, because when we design our knowledge, it is possible

to improve it in everything, both productive and administrative. And often we have this resistance to happening, which nowadays is gradually breaking down.

**SI** Here, too, there was no awareness of the impact on your customer, on the impact on the customer, on the next customer. I look at my island, I don't see what my customer gets from me, and that's it. When we start to take this kind of approach, things start to develop. But of course, we are at different levels, so to speak.

**AA** And José, do you think that with this example, there is still basically resistance to Kaizen, in the sense that there are departments, there are people who may still have a mindset that resists implementation a little, for one reason or another?

**SI** I think all areas are already creating some Kaizen concepts, okay? And many are already participating, and when I say Kaizen, it's not just about making improvements, okay? When I say Kaizen, we're talking about area meetings. But then we start to get into the other part, which is the indicator, okay? And that's why many say that it's easier in the production area.

That's right, because the production side lives with indicators, because it has been creating its indicators over time. The administrative area has no indicators, no way to measure. If I ask any of the... some key administrative areas, they don't have an indicator to measure themselves.

**SI** That's our first step, which was to create indicators for all areas through Kaizens, okay? But an indicator for an area doesn't have to be just Kaizens. I'm not here just to make improvements, right? My department has an indicator. Imagine, in my case, I have a cost reduction indicator. I know how much the car I'm analyzing cost and I know how much I want to put in. And I know where I am today.

**SI** In other words, I have a goal, I have a starting point, I have a goal, and I have my reality.

Continuous improvement, plus Kaizens, also has to do with routines and our ability to identify problems, okay? Measuring, knowing where we are, measuring whether we have problems or not, and generating our improvements from there.

**SI** If we don't have these indicators, our improvements are more difficult to generate, and we think they are easier to generate in the production area.

**AA** I think what happens with the administrative department is that we are basically a little focused on the part where we have to implement I don't know how many Kaizens.

**SI** You're focused on that. You're focused on that because not all departments have their indicators, and having a Kaizen indicator is intended to be a development, so that people look at it and say, okay, this is a way to evaluate an action, which is Kaizens. And if you look, there's a goal, there's an indicator, and there's the reality.

But this is meant for us to look at our areas and say, what should I have more of in my area? What is my day-to-day work that I should have in this way? So that I can map out whether I'm having problems or not.

**SI** Because only when I develop my ability to identify problems in my area and measure them can I improve. Otherwise, I'll always be running away, saying that other areas are the ones that can do it.

**AA** It's about developing a certain spirit, isn't it?

**SI** Developing a spirit of caring and our ability to raise issues.

Because otherwise, everything is fine in my area, I have nothing to improve here. If I don't have that ability to raise issues, you see? I'll never be able to measure if I don't have a general indicator that measures whether things are going well or badly.

**SI** What drives us, right? How do we measure ourselves? How are we doing well or poorly? Or are we achieving our goals or not? And only then can we individually awaken our will t , and figure out how we can achieve those goals, what we're doing wrong, and what we can improve. This is the first step.

**AA** What I basically understand is that sometimes it may not just be a problem of resistance. It may actually be a lack of understanding or alignment.

**SI** Which is a common alignment. Do you understand Kaizen? The indicator that you have and have to fight for improvements and I don't know what, with many actions, is a single indicator in the company. In other words, you all have the same indicator. You all have the same goal. We are all united there. And we need to have it that way. Do you understand?

**AA** Okay, just on this last point of resistance. Basically, I just wanted to ask if you think Kaizen is well promoted or well communicated to the company, or if he thinks that maybe we should all make a joint effort, that the company in general should make a joint effort to communicate a little better.

**SI** Yes, we have identified several points. But we had, it's no longer with me, improved communication, however, over time, those that we have always been able to implement, we have always done so. So, we're talking about, there you go, the people who join more recently today don't value it. But we're talking about holding a convention every year, which was very important for us to get some publicity.

Otherwise, things were a bit forgotten. Valuing the departments was another important intervention we had. Getting some space here in the factory to publicize the Kaizens is another point of communication we had.

**SI** Things are happening, but yes, it is always possible to improve more, much more, for sure. We managed to create a weekly routine of publicizing the best Kaizens, the golden Kaizens, or Kaizen activities that were happening, and there you go, we developed people in other areas who also joined in, safety joined in, quality joined in, human resources not so much, but things are happening.

**SI** In other words, of course, this... We always have to deal with various types of communication. These things are not easy, but yes, it is always possible to improve, and I hope that the people who are here now will be able to improve communication even more. I don't think it's insufficient at the moment, I think it's more than enough.

I think that anyone who joins the company knows about Kaizen. Today, for those of us on this side, it's often a source of pride to hear people debating in meetings, sometimes jokingly, but saying, "Do Kaizen, that's it." It's a sign that the word is out there and that people have made valuable suggestions. There you go. It's happening. But yes, things can improve even more if we look at companies we partner with. On the day we hold the convention, we are often limited to 150 people, but Toyota, for example, closes for a whole afternoon and everyone is together. Everyone is together in the painting space. These are proposals that we have already presented to the administration, but they are more difficult to achieve, so we are taking it step by step.

**SI** When we look at partner companies, that's what happens. The factory closes for this moment of sharing and reflection, several moments that happen.

**AA** Okay. Regarding this point of culture and motivation, José, do you think that the company's leadership, the department heads themselves, support the Kaizen values? Do you think there is a practice, for example, of trying to motivate departments by example? Do you think that happens?

**SI** It happens. It happens, but not to everyone, it's true. We haven't reached everyone, yes. But when we say that last year 89% of the population participated in at least one Kaizen, this is a reflection that things are evolving and happening. And we started with no one, with 5 or 6%.

**AA** That may also mean that people feel motivated, they do the Kaizens, sometimes not so much as a requirement, not so much as an obligation, but they even feel motivated, to have so many people.

**SI** And in the early stages, it's normal that some people are often forced to do it, but then they get used to it and don't question it. It's like when we get our driver's license. I didn't want to stop at this red light, I didn't want to make this stop, but I have to do it, it's part of the rule, and things flow naturally. It's the same thing here. Sometimes there are people who are more resistant, some think it's not for them, others think that their work is everything. And it's part of everyone's cognitive development.

**SI** When you reach a point where you can clearly understand what is an improvement and what is not, the impact your decisions have, and things flow from there. But yes, we have directions and levels at different stages. I'm not going to say that everyone is pulling in the same direction because that's not the case, we're moving forward.

**AA** You have to try, but sometimes it's not possible to get everyone involved, a little bit individually in that sense. It's the individual attitude, the managers

themselves, sometimes there are people who are more inclined to do that, others less so. We try to motivate everyone, but sometimes it's not possible.

**SI** There are people who are naturally unmotivated, it won't be here or in any company, they just exist, it's part of life.

**AA** Here's a slightly more abstract question. José, do you think that company culture affects the way we implement Kaizen? Do you think that basically... Kaizen is a culture that comes from Japanese culture, which is a little different from Portuguese culture. Do you think we integrate well?

**SI** If we're talking about Portuguese culture, that's relative, because fortunately I have several experiences and in Portuguese companies, in Portugal, things go well after a few years.

We're talking about this type of cultural mindset of continuous improvement and cooperation taking 10, 15 years for things to run smoothly. We're talking about the fact that we started seriously working on in 2019, so we're talking about 6 or 7 years that things have been running smoothly, right? We're taking big steps, we can't expect a Japanese company, or even a Portuguese company, to be in the same position as a Portuguese company that implemented this 20 years ago. It's part of the evolution.

**SI** I think we are the ones who create the culture. It's not that, for example, things won't work because they're Portuguese or Japanese. That's completely wrong.

**AA** Because they are effectively different cultures, aren't they? So sometimes we can have some difficulties, can't we?

**SI** The culture is different, but the attitudes we work with may or may not be different from who we are outside of here, and if we have a certain way of being at work, it doesn't prevent us from being different outside. And so, regardless of

our culture outside in our country, here at work, we can have our work culture and adapt, right? If we all work on the right here and someone comes in wanting to work on the left, that person will most likely go to the right, so if the person on the right is on the wrong side, then we have to force everyone to go to the left, right?

**AA** It's not so much about the country, is it? More in terms of the company, isn't it?

**SI** I think that at the company level, as the environment is created, things flow. For better or for worse. Because the bad things that continue here sometimes influence others.

I've had many colleagues who have arrived here over the years and said, "This is so bad, I don't know what," "Who told you that?" "Oh, so-and-so told me, and so-and-so, and I don't know who else." It's funny, they told you the guys have been here for 40 years, call them over, I would call over the guys who had been here for 40 years, so, this is so bad and you're still here after 40 years? Oh, yeah, but I don't know what. It's not that bad. Otherwise, you would have left already. So, sometimes it's what we hear from the sidelines instead of analyzing things and taking a position.

**AA** basically I was saying this is culture because the thesis topic is basically Kaizen, analyzing whether there is a culture of resistance in companies. I analyzed some case studies, basically I'm here analyzing interviews with people, to see if people understand what Kaizen is, if they still think there is any resistance, this is basically whether the company has a culture of resistance, from what we understand from the evolution and from what we've talked about, I don't think so.

**SI** If we look at the indicators, no. If you look at individuals, maybe some will still say yes because they actually have some difficulty talking to people who

have been here for 20 years and have never spoken to them, and then they realize that it has an impact on their work, and there you go, it's part of personal development to accept these things, and that's the impact it has.

**AA** Just to finish up, taking into account everything we've talked about, what can we still improve in the way we implement Kaizen? What else is relevant to improve? Basically, there are always things, in the philosophy itself.

**SI** We still need to accept that we have problems all the time, and that we have to accept and measure them; we always have that difficulty. It's not Kaizen itself, the way of thinking is there, but we often don't want to measure. The biggest difficulty the company has right now is actually having the indicators in the departments and taking them on and measuring them. We had time, but they didn't like the values, so they went back.

**SI** It's not that people don't do it, people do it, people like challenges, everyone likes challenges, everyone gets up in the morning to do a good job. Now we have to know how to measure it. For each of us, it is satisfying to know that a problem has been measured and that I have solved it and that everything is fine. Now, if I solved something that wasn't even a problem...

**AA** Having a little more awareness of what the problems are, yes.

**AA** Basically, this is the question I had at the end, which is basically what would help people see this more as an opportunity, not so much as a requirement, but we've already talked a little bit about that.

**AA** On a final note, if there is any other experience with Kaizen that you would like to share, we've already talked about everything.

**SI** Yes, nothing more to say.

AA Thank you.

# Appendix P – Interview 15 Transcript

08/2025

Interviewee: António Almeida (AA)

## General information:

- Name: António Almeida
- Department/Work Area: Public tenders, Commercial area
- Years at the Company: 3
- Position: Tenders Specialist

## Understanding and experience with Kaizen:

1. How would you describe your understanding of what Kaizen is? Would you say your involvement with Kaizen is high/medium/low?

**AA** I would say I understand it quite well, since I have been with the company for 3 years and have been directly involved with submitting Kaizens for about a year as the department's Kaizen pivot, so I would say my involvement is medium to high.

2. When was the first time you came into contact with Kaizen at Happybus?

**AA** As soon as I joined, the whole process was explained to me, and I was asked to submit Kaizens, even though the department I was in was not very active.

3. How involved have you been in Kaizen projects?

**AA** At the moment, quite a lot, but more from the perspective of controlling the department's Kaizens than in continuous improvements of my own, although I have also made some.

4. Can you give an example of a Kaizen initiative you have participated in? And what was the most productive Kaizen you submitted?

**AA** I participated in an initiative where we reused material for office chairs, saving the company resources and money, although this effort was not highly valued from a Kaizen evaluation point of view. I would say that the most productive was a change in the digital signature system, from a PEN system to the cloud, which saved us a lot of time if we needed to sign a document for submission, for example, and the person responsible did not have the PEN, postponing everything until the next day.

**Benefits:**

5. In your opinion, what were the greatest benefits that Kaizen brought to Happybus?

**AA** I think Kaizen clearly brought benefits, especially from a practical point of view, with the implementation of Kaizens that reduced many costs for the company, time, allowed innovative changes in bus production, in safety, and even in the administrative area. Although the evaluation deserves criticism, there were many advances and improvements, even in 5S.

6. Have you noticed any long-term changes that the company or your department has undergone based on Kaizen?

**AA** My time at the company is too short to make long-term assessments, but I have seen a lot of enthusiasm, especially in production, since in the

administrative area Kaizen seems to have been abandoned by some departments.

7. Is the application of Kaizen useful in an office context? Or should it only be applied to production?

**AA** It would be useful if it were well applied, with well-designed and structured evaluation criteria to value what can and should be valued in an administrative context, but the reality is that this does not happen in my opinion.

**Challenges:**

8. In your view, what were, and continue to be, the biggest challenges to implementing Kaizen at Happybus?

**AA** The main challenge is really to make administrative Kaizen functional, to motivate even the most resistant people, and to make the Kaizen culture natural and not an obligation.

9. Is Kaizen implementation more accepted in a production context than in an administrative context? If so, why?

**AA** It is more accepted firstly because it is more practical, and therefore easier to make improvements, but above all it is more accepted because those who carry out administrative Kaizens do not receive the recognition they deserve from an evaluation criteria point of view. For example, a Kaizen that has made great strides in cybersecurity is not valued, since the security criterion only counts points if it is in a production context. Scoring cannot be everything, and we all must make an effort to ensure that there is a real desire to improve, without it being an obligation, but we all have to do more to improve the process.

10. Have you ever resisted or seen colleagues resist a Kaizen initiative? What would be the reasons?

**AA** Every day I see colleagues who don't want to do Kaizens because they don't have time, or because they don't think they can make a difference administratively. I don't think there is a culture of resistance in the company, especially since there are people who submit 200 Kaizens per year, but there are people who don't want to collaborate, don't want to have extra work in the name of progress, and in practice resist. The truth is that, in my opinion, even though there is no culture of resistance, there are resistant people, but isn't culture made up of people?

11. Do you feel that the Kaizen philosophy is well promoted by the company?

**AA** I feel that it is well promoted, but not always well applied. The promotion is great, but I don't think the practical effort to improve the process is effective.

**Culture, Motivation, and Leadership:**

12. Do you feel that the company's leadership believes in and values Kaizen practices?

**AA** I think that leaders promote Kaizen from a general point of view, but the company's leadership, as well as individual managers, could set a better example, and there are managers who sometimes do not submit any Kaizens.

13. Do you feel that employees are motivated to participate and submit Kaizens? Or is it seen as an obligation?

**AA** As explained earlier, it is seen more as an obligation, even because of the goal of two Kaizens per year, which is seen as "mandatory."

14. How does the company culture affect the way Kaizen is implemented? Do you think Kaizen could be even better integrated into the culture? How?

**AA** I think that the company culture, from an institutional point of view, is closely linked to Kaizen, due to its connection to Toyota, the company associated with the founding of the concept. However, in practice, I find it difficult to see Happybus as culturally identified with continuous improvement. We have a Kaizen department, many people dedicated to continuous improvement, but it still seems forced to me, as if we were obliged. Kaizen presupposes gradual improvements, but also a genuine desire to improve and promote the necessary changes. Happybus does not show this, perhaps because it is Portuguese, and Portuguese corporate culture does not work with proactive improvement, but I think that for there to be unity between the company and Kaizen, the process itself would have to be reformed. But is it possible to reform the mentality of Portuguese workers? Perhaps not.

15. What is the role of recognition and feedback in promoting and motivating Kaizens?

**AA** Very relevant, and Happybus distributes monthly and annual awards for Gold, Silver, and Bronze Kaizens, but once again, the criteria favor production Kaizens, rather than having separate awards for the two types of Kaizen.

**Suggestions for the future:**

16. What else could be done to improve the Kaizen process at Happybus?

**AA** The Kaizen evaluation process can and should be improved, and motivation and mindset change can and should be worked on.

17. What could help workers see Kaizen as an opportunity rather than a requirement?

**AA** Once again, I believe that valuing the Kaizens that are carried out and treating Kaizen positively will gradually change mindsets in an educational way.

## **Declaration of generative AI**

During the writing of my thesis, *The Kaizen Philosophy in the Context of SMEs, The case of a portuguese bus manufacturer company*, ChatGPT (by OpenAI) was used for occasional language refinement, summarization of selected interview content, assistance in content structuring and identification of potential limitations on proposed solutions. Additionally, Turboscribe by TurboScribe was used to assist in verifying the accuracy of transcript content against audio recordings and in highlighting potential valuable insights from transcripts. The prompts used are listed at the end of the document in the Prompts List section. All outputs were reviewed and edited by me, and I take full responsibility for the content of the work presented. I also declare that I am aware of and respect the Artificial Intelligence Rules of Conduct of Católica Porto Business School.

# Prompts List

1. How should I organize the chapters? Where do I insert my abstract?
2. In the Interview section, what are the most relevant themes?
3. I want to present this idea in a more structured way, can you help?
4. What terminology should I use to make this sentence more adapted to academic context?
5. What limitations should I consider when I present this solution?

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