

# LEAN Ohio

## PROJECT STARTER KIT

If you plan on doing some sort of **process improvement**, your next step is to determine the process or subprocess you will address. The following prompts will help you clarify your focus while setting the project up for success.

You can use this template whether you're considering a Kaizen Event, a Lean Routine, or something smaller involving yourself or a small group of colleagues.

### • STEP 1: What process (or subprocess) do you want to improve?

You only need to write a few words (example: claim-checking process), but make sure you have a process in mind and not a general problem (example: bad communication) or a vague concern (example: morale).




*Remember that process improvement can be scaled. (See page 1.)  
A full **Kaizen Event** is a team undertaking unfolding over 5 days. A **Lean Routine** is more focused and typically takes about 8 hours over several meetings.  
You also can improve your own work steps **by yourself or with colleagues**.*

### • STEP 2: How do you know that this process (or subprocess) needs to be improved?

What are you seeing that suggests that the work flow is falling short? Possible signs of a troubled process include delays, long waiting times, customer complaints, rework, big backlogs, unmanageable inventories.

*If you can't justify having this process be the focus of your improvement efforts, then go back to the previous step and redefine what you want to improve – or gather data to confirm your suspicions that the process needs attention.*

### • STEP 3: Now that you have a process in mind for possible improvement, take this 2-minute reality check.

For each statement, put a check in the YES or NO box to mark your response.

|   | YES                      | NO                       |
|---|--------------------------|--------------------------|
| 1. I have data showing that this process needs to be improved.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. I know exactly how we can improve the process.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. I work in this process.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. The process has recently been changed.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. If we improve this process, customers will be thrilled.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Improving this process would probably require us to address collective bargaining issues (salaries, grievances, benefits, etc.). | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Efforts to improve this process would fit the overall mission, vision, and goals of the agency.                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. The problems with this process have been a pet peeve of mine for a long time.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. My manager(s) would support the idea of improving this process.  | <input type="checkbox"/> | <input type="checkbox"/> |

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Continued...

The checkmarks below show ideal responses based on best practices. The text on the right explains why. Wherever you see a mismatch between *your* response on the previous page, and the ideal response shown below, read the explanatory text and consider how you might need to redefine your process improvement project.

|  | YES                                 | NO                                  |   |
|--|-------------------------------------|-------------------------------------|---|
| 1. I have data showing that this process needs to be improved.                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <i>Before moving forward with process improvement, you should have objective data to demonstrate that action is needed. If you don't have it, take time to gather it. Good data will also help you scope your process improvement effort.</i>                   |
| 2. I know exactly how we can improve the process.  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <i>It's never wise to begin an improvement project with preconceived changes in mind, or to use a project to rubber-stamp your already established plans. The data and analysis will lead you to the best solution and the smartest plan of next steps.</i>     |
| 3. I work in this process.   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <i>You should work in the process that you're aiming to improve. Don't try to solve other people's problems.</i>  |
| 4. The process has recently been changed.  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <i>If the process has been changed recently, wait before making more changes. Allow time to see how the new approach(es) affect outcomes, efficiency, and customer satisfaction.</i>  |
| 5. If we improve this process, customers will be thrilled.   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <i>You want to focus your improvement efforts on processes that are important to your customers.</i>  |
| 6. Improving this process would probably require us to address collective bargaining issues.       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <i>Issues relating to collective bargaining are not addressed in Lean improvement projects.</i>   |
| 7. Efforts to improve this process would fit the overall mission, vision, and goals of the agency. | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <i>Ideally, an improvement project (no matter how small) should be well-aligned with the mission, vision, and goals of the agency. The small arrow of the project should be in the same direction as the big arrow of the agency.</i>                           |
| 8. The problems with this process have been a pet peeve of mine for a long time.                   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <i>Pet peeves rarely point to the best improvement opportunities. Let customer feedback and measurable data guide you in deciding where and whether to take action.</i>   |
| 9. My manager(s) would support the idea of improving this process.                                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <i>Support from your immediate manager, and from leadership (if your improvement project is fairly significant), is critically important. Support doesn't guarantee success. But its absence will be a big barrier when you're trying to implement changes.</i> |

- **STEP 4: Using your insights from above, write a project statement that identifies what process you plan to improve and what you aim to accomplish. Be brief (one sentence or phrase) but be specific.**



- **STEP 5: Given the scope of this possible project, how will you move forward?**

- I will recommend a full **Kaizen Event** (includes scoping process, five days with team, regular follow-ups)
- I will recommend a **Lean Routine** (includes scoping process, about 8 hours over several meetings, follow-ups)
- I will complete this project **with 1-3 colleagues** over the course of a few meetings.
- This is something that I will be able to do **on my own**.

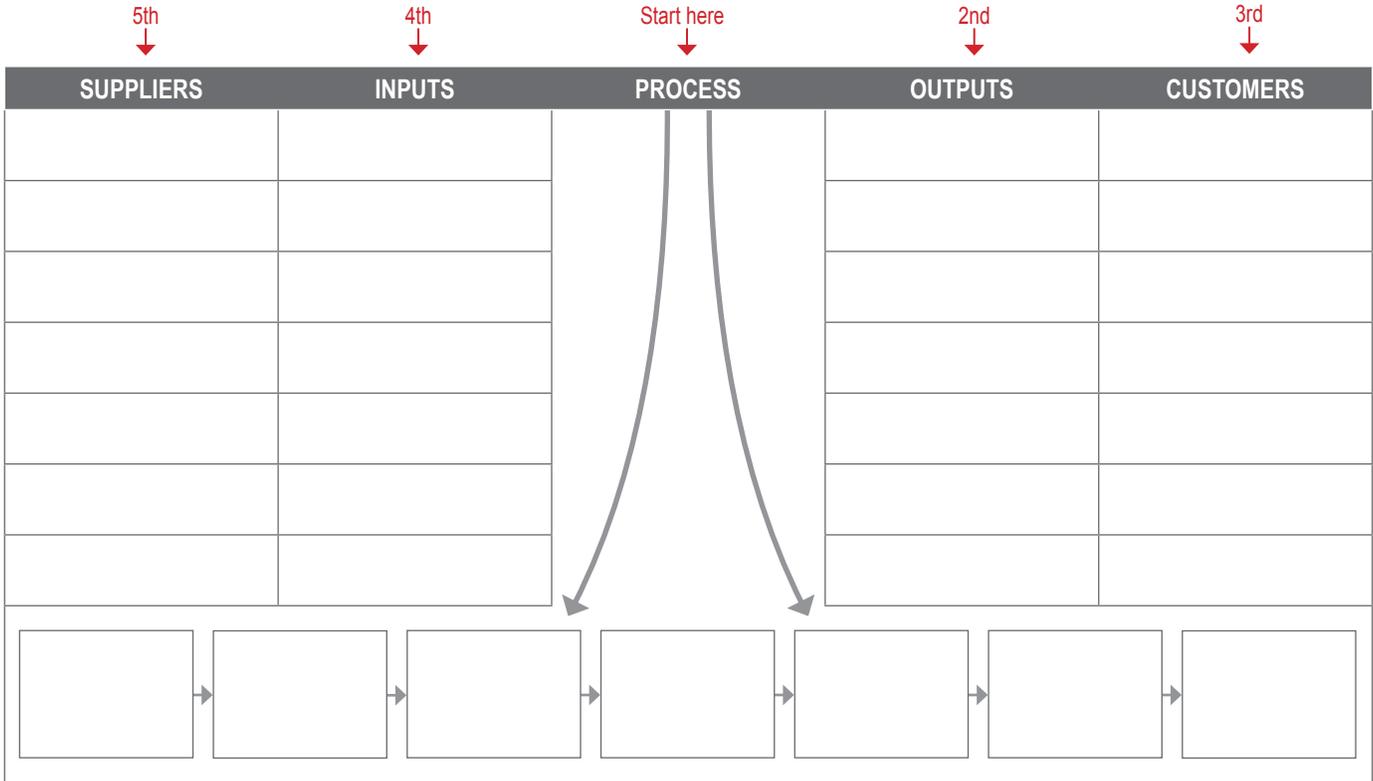
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Continued...

The template continues below, giving you a chance to create a SIPOC (which will serve as a macro view of the process) and identify key measures. These important stage-setting steps will get your project started right.

• **STEP 6: Create a SIPOC.**



• **STEP 7: Identify key measures.**

Without measures, it's hard to tell whether a process is being improved – and impossible to tell the degree of improvement. The key with Lean is to identify a set of meaningful measures that drive the process improvement effort.

Some of the most commonly used measures are listed on the right. For example, lead time (which measures the total process time from first step to last step) is a mainstay measure in Kaizen, with most teams aiming to reduce lead time by at least 50%.

For your own process improvement project, what are three critical measures that will best convey the degree to which your improvement effort is successful? What will you most want to track?

You can easily justify having additional measures, but for this exercise, narrow in and write down the top three.



|                                     |  |
|-------------------------------------|--|
| <b>Time-based process measures</b>  | <ul style="list-style-type: none"> <li>↓ Lead time</li> <li>↓ Cycle time</li> <li>↓ Waiting time</li> <li>↓ Time to complete form</li> <li>↓ Motion, travel time</li> </ul>  |
| <b>Count-based process measures</b> | <ul style="list-style-type: none"> <li>↓ Process steps</li> <li>↓ Handoffs</li> <li>↓ Decision points</li> <li>↓ Loopbacks</li> <li>↓ Delays</li> <li>↓ Customer complaints</li> <li>↓ Number of forms</li> <li>↓ Inventory quantity</li> <li>↓ Backlog</li> </ul> |
| <b>Outcome measures</b>             | <ul style="list-style-type: none"> <li>↑ Customer satisfaction</li> <li>↑ Direct cost savings</li> <li>↑ Customer cost savings</li> <li>↑ Redirected work hours due to gains in efficiency</li> </ul>  |