LEANOhio PROJECT STARTER KIT

This page will help you begin making the invisible visible with a **poka-yoke**.

From the Japanese term for mistake-proofing, poka-yoke is all about putting easy measures in place to *prevent* errors from occurring early in the process – so that staff don't have to spend time correcting errors later in the process. It's all about working smart and getting things done right the first time around.

For many government agencies, forms are the biggest source of preventable errors – so they're likely to be your best candidate for putting poka-yoke to work.

Many agencies require incoming information as a key input to their processes. Forms are the typical method for getting this information: paper forms, web-based forms, fillable PDFs, and so on. Ideally, a form should get all the needed information the first time it's filled out and submitted. But in reality, many forms are long, complicated, full of jargon, and impossibly difficult to navigate. The result? Agencies get incoming information that's incorrect and incomplete – and staff have to circle back to correct the errors and get the needed info. It costs extra time and money, and it frustrates everyone. And it represents a major improvement opportunity.

- **STEP 1: Focus the project.**
  In your work area, what form* is the biggest source of errors and resulting rework? In other words, what form is the best candidate for poka-yoke?

* Incoming information can arrive via paper forms, but consider electronic forms as well. These are increasingly used, but the fact is, online forms can produce just as many errors as their paper-version counterparts.

- **STEP 2: Build the case.**
  What are some of the big errors that frequently occur with this form? How often? What makes it a good candidate for poka-yoke?

Here's a sample of common errors and problems relating to forms:

- Missing support document(s)
- Missing signature
- Missing joint signature
- Missing ID numbers
- Incorrect/incomplete address
- Missing SSN
- Missing phone number
- Too many inquiries from people asking how to fill out the form
- Too many different versions of the form
- Too many unnecessary questions
- Form is too long

- **STEP 3: Start building a poka-yoke team.**
  Who needs to be involved in analyzing and improving the form? List possible participants and a sponsor for this project.

PARTICIPANTS
Possible project sponsor:

- **STEP 4: Determine your next steps.**
  Take a few minutes to list what you will do during the next week or so to move beyond this worksheet and get the project under way.

ACTION	WHEN

Be sure to use data when analyzing the form.

Questions to ask include: How often (percentage of times) is the form completed with/without errors? How many errors are made? What types of errors are occurring, and what is their relative frequency? Why are errors occurring? How much time is spent reviewing the form and correcting errors?

Recommended: Create a checklist to identify errors by type or by question. Then create a Pareto chart to see error frequency. Look for root causes. Test the improvements to the form, then refine and retest, then implement.