[Title of Kaizen Event]

[Goal Statement]

Organization Name

Event Dates

Project Charter: Specific Problem Statement

[What is the specific process/system to be improved and why? When does it occur? Where does it occur? How often? What data do you have to support this statement? The Problem Statement ties to your Business Case]

Project Charter: Team Member Roles

- **Sponsor:** [Who funds/provides resources for the project]

- **Team Leader(s):** [Chairs the Event, assures Team stays on track, allocates Team responsibilities]

- **Facilitator:** [The Lean Champion- teaches/coaches/mentors/removes roadblocks]

- **Members:** [5-7 people; Include those directly involved in process. Include at least two people from other dept.]

- **On Stand-by:** [Expertise available to contact with a specific question or need]

Project Charter: Business Case

Business Reasons for Project:

<u>You know the specific problem- now describe how that impacts your organization. What is the financial impact (no necessarily money)? Consider the 8 Forms of Waste.</u>

- [Insert text]
- [Insert text]
- [Insert text]
- [Insert text]
- [Insert text]

<u>[Insert Text]</u>

- [Insert text]
- [Insert text]
- [Insert text]
- [Insert text]
- [Insert text]

Project Charter: Business Case

Key Output Measures:

[How will you measure your success?]

- [Insert specific performance measure]
- [Insert specific performance measure]
- [e.g. staff trained, % reduction total cycle time, % reduction excess inventory]

Estimate on Savings:

[Insert benefits of improving process/system e.g. time savings, future savings on supplies/equipment]

Project Charter: Specific Goal Statement

[The specific outcomes to achieve from the Event- must be realistic. e.g. develop standard work and SOP, eliminate waste, eliminate batches and move to single-piece workflow, reduce errors and time to resolve, create the Visual Workplace]

Project Charter: Project Scope

In Bounds:

[What activities should be included in this Event? Are there any legal or certification requirements that must be included?]

Out of Bounds:

[What activities or other processes should NOT be part of this Event?]

Starting & Ending Points:

[What part of the process/system will be addressed- the whole lifecycle or specific begin/end steps?]

Project Charter: Data Analysis

- [Insert data/stats collected from current process. e.g. error rate, error response rate, transaction/turn-around time, excess inventory, rework rate]

AGENDA: DAY 1

- Review of Lean Elements, Rules, Tools
- Review Problem Statement, Goals, & supporting documentation
- Warm Up Activities (The Customer, 5 Whys)
- Review Team Rules
- Develop Current State Map
- Identify Value Added, Non-Value Added, and Non-Value Added but Required activities
- Calculate Total Cycle Time

AGENDA: DAY 2

- Identify Forms of Waste
- Create Future State Map
- Develop Standard Work & Single Piece Flow
- Develop Visual Workplace

AGENDA: DAY 3

- Determine if all Goals have been met
- Complete Implementation Plan/Assignments
- Finalize PowerPoint & Identify Presenter Roles for Management Presentation
- Closing: Lessons Learned, Future Items to Address

Example of the 5 Why's

- I can't find where I saved my file.
  - Why can't you find your file?
- Because I don't remember the file name or the directory I save it in.
  - Why do you need to remember the file & directory name?
- Because each staff person uses their own naming system.
  - Why does each staff use a separate naming system?
- Because we were never taught to do it otherwise.
  - Why were you never taught?
- <u>Because a standard procedure does not exist.</u>

Root Cause

Project Charter: Team Rules

- Keep an open mind
- No such thing as a silly question
- There is no sacred turf- nothing is "off limits"
- Don't worry about being perfect/solving all problems
- Processes should be kept as simple as possible– consider if a process step can be eliminated
- Limit action items to two weeks
- Team dissolves after Implementation Plan is completed
- One person=One vote
- and…

LET'S LOOK FOR WAYS TO MAKE THIS FUN!

Current State Map

[Insert photo of current process map]

[Include value added VA, non-value added time NVA, & non-value added but required NVAR]

[Include total cycle time: VA+NVA+NVAR]

New State Map

[Insert photo of new process map]

[Include data on value added time and % reduction in total cycle time]

Outcomes

- [Process/System Change1]
  - [text]
  - [text]
  - [text]
- [Process/System Change2]
  - [text]
  - [text]
  - [text]

Outcomes

- [Process/System Change3]
  - [text]
  - [text]
  - [text]
- [Process/System Change4]
  - [text]
  - [text]
  - [text]

The Visual Workplace

- [Insert new Visual Workplace tools that will be used]

The Implementation Plan

- [Insert action items listed in Implementation Plan. Limit action items to 2 weeks if possible. Team doesn't break-up until all actions items are completed.]

Lessons Learned

[Gather feedback from Team on the Event. What worked? What didn't work?]

- [e.g. Set time limits for discussion topics]
- [e.g. Checklists were very helpful]
- [e.g. Don't extend boundaries/scope]

Looking Ahead…Other Needs

[What other problems did you find along the way? Were there other side processes that were not included in this event?]

- [Need1]:
  - [Text]
  - [Text]
- [Need2]:
  - [Text]
  - [Text]

The Kaizen Team

- [Insert photo of Team]