ΣZ SIGMA
CONTINUING EDUCATION

LEAN PROJECT:
[ENTER HERE]

PROJECT INFORMATION

Project ID/Name:

Start Date:

Planned End Date:

Approval:

Team Lead:

Team Members:

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EXECUTIVE SUMMARY: LEAN PROJECT

The executive summary should be 1 – slides in length and provide a concise and accurate account of the project, including:

- Problem statement

- Project scope

- Major project milestones and key learning

- Conclusions

- Project recommendations

- Actions Taken

- Benefits realized
  - Process capability before and after
  - Financial benefits
  - Other benefits

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DEFINE THE PROBLEM

Define Issue/Problem and Describe Current State:

Gap between 'Current' and 'Desired Condition'. Who are the customers and how are they impacted and can you quantify? (Patient care, safety, time, cost, morale, etc.) Describe What, Where?, When?, How? Who are stakeholders? What are benefits of improving the situation?

Typical tools: Problem Statement, SIPOC, Mapping (Value Stream Maps, Process Map, Spaghetti Diagram) Pareto, '8 Wastes', '5 Whys' **Go to the problem area!** Don't forget the winning conditions (Change Readiness Assessment, Stakeholder Analysis and Communication Plan)

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MEASURE & ANALYZE THE PROCESS

Analyze the Process and Identify Root Causes:

Identify Waste Drill down to root causes. Typical tools: '5 Whys', Fishbone charts, Maps, Spaghettis, Pareto and FMEA (Failure Mode and Effects Analysis). **Must involve process stakeholders.**

DESIRED FUTURE STATE

Desired Future State:

How should the process be? What should it look like? Maps, diagrams, metrics (i.e. Quality, safety, cycle time, effort / cost, morale, etc.).

Measure	Baseline (Current)	Target (Future/Desired)	Actual/To Date

SOLUTIONS

Solutions:

What key solutions/changes will be made? Will they address root causes/issues? Do stakeholders understand, agree with, approve of solution and will they support and try it? What metrics can be tracked? Are rapid trials possible? Also think about Solution Prioritization Matrix. Tools that help with solutions: 5S/6S, Standard Work, Kanban, Workplace Visualization

RESOLUTION ACTION PLAN

Resolution Action Plan:

Who will do what by when? Who needs to be involved? (Stakeholders) Can rapid trials be done? What communication is required? Will actions address root causes? What metrics will be tracked? Can attach separate action plan sheet if necessary.

No.	Description	Resp.	Start		Finish	
			Plan	Act	Plan	Act

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RESULTS VERIFICATION AND BENEFITS

Results Verification and Benefits:

How will we know if issue has improved/been resolved? Before vs. After results tracking of key metrics (First Pass Yield, Cycle time, mistakes, cost, level of waste, TAT, etc.)

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SUSTAINING ACTIONS

Sustaining Actions:

How will we ensure that the improvements are sustained? Typical approaches: Standardization, Documentation, Error-proofing, metrics, reports, compliance audits, training, 5S, visual management.

APPENDICES

Include in the appendices any information that is too unwieldy to be presented in the main body of the project report. You may wish to include diagrams or charts, as well as any test data. Please include labels or reference tags to your information in the Appendix so that it can be easily cross-referenced with the main body of your project report. Example in the Measure/Analyze stage you may write about what you learned from the Fishbone Diagram , reference the Appendices' # and show the tool output here.

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AUTHENTICATE

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Signature – Certification Candidate

_____

Signature – Champion

_____

Date

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