



ΣZSIGMA

PROFESSIONAL DEVELOPMENT

Lean Certification

LEAN PROJECT:
[ENTER HERE]

PROJECT INFORMATION

Project ID/Name:

Start Date:

Planned End Date:

Approval:

Team Lead:

Team Members:

EXECUTIVE SUMMARY: LEAN PROJECT

The executive summary should be 1 – 2 slides in length and provide a concise and accurate account of the project. Topics you could include:

- Problem to be solved
- Project scope
- Major project milestones and key learning
- Conclusions
- Project recommendations
- Actions Taken
- Benefits realized
 - Process capability before and after
 - Financial benefits
 - Other benefits

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?

Describe the Issue, what tools you used and how they helped you learn or validate something to help identify or solve the problem.

Typical tools referenced and used (add these to your appendix): Problem Statement, SIPOC, Charter, Change Readiness Assessment, Stakeholder Analysis, Communication Plan, Mapping (Value Stream Maps, Process Map, Spaghetti Diagram) **Go to the problem area!**

MEASURE & ANALYZE THE PROCESS

Analyze the Process and Identify Root Causes:

What tools did you use and what questions did they help answer to lead you to what to do next in your project? What metric are you trying to improve (by how much, in what direction, by when?)

Identify Waste, Drill down to root causes. Typical tools: '5 Whys', Fishbone diagrams, Pareto Charts, Current State Maps (VSM, Process, Spaghetti), Value Add Analysis and Waste Analysis. Include your project task plan. (add tools to the appendix) **Must involve process stakeholders.**

DESIRED FUTURE STATE

Desired Future State:

How should the process be? What should it look like? Future State Maps (VSM, Process, Spaghetti), diagrams, metrics (i.e. Quality, safety, cycle time, effort / cost, morale, etc.) Metric improvement table.

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? Include your solutions PICK chart

Resolution Action Plan:

Who will do what by when? Who needs to be involved? (Stakeholders) Can rapid trials be done? What communication is required? (reference Communication Plan) Will actions address root causes? What metrics will be tracked? Final part of your Project Task Plan.

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.) Final section completed of your Metrics table)

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 and tools that are referenced in the main body of the project report.

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

AUTHENTICATE

EZSigma Group will never willfully disclose any personally identifiable information from this project submission to any third party without first receiving the user's permission including any information that is construed to be confidential or a trade secret. However, you give consent to EZSigma Group to use information contained in this document for internal, marketing and promotional purposes while referencing the name of the submitting company but without making any reference to the person(s) submitting it.

Signature – Certification Candidate

Signature – Champion

Date