LEAN ACTION REPORT

UNIVERSITY OF
SOUTH CAROLINA

Fillable, savable PDF

Use this quick form to share how you're using Lean to bring about improvement.

Fill in the boxes that apply, save the form, and send it to strongn@mailbox.sc.edu

At the Office of Organizational and Professional Development, we use the input from these forms to track progress, to pinpoint where support is needed, and to uncover success stories that call for recognition.

CONTACT INFORMATION

Your Name:

Your Title and Office/Division:

Email Address:

Phone:

Today's Date:

mm/dd/yr

PUTTING LEAN TO WORK

Which of the following have you used recently, either on your own or with a group? Check all that apply:

Lean Methods & Tools

- [ ] SIPOC
- [ ] Process Walk (gemba)
- [ ] Process Mapping
- [ ] TIMUWOOD (process waste)
- [ ] A3 Problem Solving
- [ ] 5S (to organize a work area)
- [ ] Kanban Board

Process Improvement Events

- [ ] Kaizen Event
  (4-5 days in a row)
- [ ] Multi-Session Event
  (2-3 sessions, each lasting 1-3 days)
- [ ] Small-Scope PI Event
  (half day to 3 days)
- [ ] Lean Process Design
  (using Lean concepts when creating
  a new process)

Key Lean Concepts

- [ ] Voice of the Customer
- [ ] Root-Cause Analysis
- [ ] Mistake-Proofing (poka-yoke)
- [ ] Flow, Pull
- [ ] Standardization
- [ ] Process Measures

TELL YOUR LEAN STORY

For any of the items you checked above, describe how you've put the Lean tool or event or concept to work.

RESULTS

What are the outcomes and impacts? Describe any qualitative or quantitative results here.

SUPPORT

What support and additional Lean learning might be needed going forward?

ADDITIONAL INFO

Provide any additional information here.

If you're currently involved in a process improvement project, or you were involved in a project that recently completed its work, use the **improvement project profile** on the next page.

IMPROVEMENT PROJECT

UNIVERSITY OF
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Use this quick form to share information about improvement projects at any stage of completion:

• Just getting started   • Currently under way   • Recently completed   • Implemented and generating results

Fill in the boxes that apply, save the form, and send it to strongn@mailbox.sc.edu

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BACKGROUND

Name of process that's being improved:

Team Sponsor(s):

Team name:

Team Leader(s):

What problem or opportunity prompted this project?

Team Members: (separate names with commas)

PROJECT STATUS

On a scale of 1 to 8, how far along is this project? Check one:

☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8
We are scoping the improvement project and developing the project charter	The charter is completed, but we haven't met yet as a team	We have started meeting as a team; the project is under way	Our work on the project is about 50% complete	Our work on the project is about 75% complete	Project is completed, but the improvements have not yet been implemented	The improvements developed through this project are being implemented	We're seeing measurable results from this improvement project

SUPPORT If you need guidance to keep the project moving forward, explain here:

IMPROVEMENTS

What are top three changes/improvements developed through this project?

RESULTS

Use the next page to report projected or actual results.

* Complete this page only if the project is completed and you have projected or actual results.

RESULTS

There's no need to fill in all the fields of information; just fill in the ones that apply, even if you have just a few numbers.
- If the improvement project was **recently completed**, enter any available data in the first two columns: Baseline and Projection.
- If improvements have been implemented and **results are being generated**, enter data in the Baseline and Actual columns.
- If you are providing **updated results**, enter data in the Baseline and Actual columns.

	Baseline Measure This is the initial number that was calculated at the start of the project.	**Projection** This is the projected number that's expected once all the improvements are implemented.	**Actual** Use this column if some or all of the improvements have been implemented and you have actual results to report.
✓ **SIMPLER**			
Number of steps in the process			
Number of handoffs in the process			

	Baseline Measure	**Projection**	**Actual**
FASTER			
Lead Time			

(Lead time is the total start-to-finish process time, including waiting time, to produce and deliver an output to a customer)

What is your unit of measure for lead time?

	Baseline Measure	**Projection**	**Actual**
☆ **BETTER**			
Rework (%)			

(Rework is the percentage of units in a process that need to be reworked for a given time period)

	Baseline Measure	**Projection**	**Actual**
Customer Satisfaction Rating			

(Ratings based on a survey or other instrument to get quantitative customer feedback)

What scale is used for customer satisfaction? (1-to-5, 0%-100%, or other)

Describe how the improvements will directly benefit customers:

LESS COSTLY

If you are reporting on a recent project, you will have projections only.
If the improvements have been in place for at least a year, provide actual savings in the right-hand column.

	Projection	**Actual**
Direct cost savings per year ($) ⟶		

(Total savings from reduced expenses for a given time period – such as savings from reduced postage, paper cost, storage, etc.)

If direct cost savings were reported, what has been reduced to generate these savings? (e.g., printing, postage, storage, etc.)

Number of redirected work hours per year		

(Number of work hours that become available for value-added work as a result of improvements.)
Caution: Because saved time is redirected to other work, redirected work hours should not be monetized and presented as a cost savings