Leaning Forward – Process Checklist

Process Improvement Initiative

Oregon State UNIVERSITY

☐	Phase/Process Step	Responsible Roles
Phase 1: Team Development		
☐	1. Project Team selection. Member determination based on area of expertise and interest in Lean Process Improvement project participation.	Sponsors
☐	2. Project Kick-Off/Work Session (maybe separate events or combined). Champion Sponsor welcomes and introduces Lean Project to team, outlining expectations and providing an estimated time line.	Facilitator Champion Sponsor Lean Project Team
☐	3. Lean Project Team identifies group norms, meeting cadence and timing for project work.	Facilitator Lean Project Team
Phase 2: Process Identification – Skip if not be required		
☐	4. If more than one project identified, Team can use the Prioritization Tool for analyzing projects and determining highest priority.	Facilitator Lean Project Team
☐	5. If needed, validate project need with additional stakeholders (customers and/or process "doers").	Lean Project Team Members
Phase 3: Map Current Process		
☐	6. Determine/identify process Purpose.	Lean Project Team
☐	7. Determine/identify process Customers and Suppliers.	Lean Project Team
☐	8. Map current "as is" process using Lean symbols.	Lean Project Team
☐	9. Using the current process map, identify the following: a. Bright Ideas b. Issues (challenges) c. Waste (redundant steps/forms) d. Wait Time	Lean Project Team
☐	10. Identify current process cycle time.	Lean Project Team
☐	11. Determine process metrics most valuable (key performance indicators) for tracking improved process.	Lean Project Team

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Phase 4: Root Cause Analysis		
☐	12. Identify the core *issues* or *problems* with the current process.	Lean Project Team
☐	13. Perform root cause analysis by asking "why" the problems exist.	Lean Project Team
☐	14. Narrow "why" results to focus on a few common root causes.	Lean Project Team
Phase 5: Customer Driven, Value-Added Solutions		
☐	15. Identify customer driven solutions.	Lean Project Team
☐	16. Score customer driven solutions using Decision Matrix.	Lean Project Team
☐	17. Enter/Update Decision Matrix with Team Member scores, if needed.	Facilitator
☐	18. Analyze and discuss Decision Matrix outcomes, settling on 3 to 4 potential solutions.	Lean Project Team
Phase 6: Initial Sponsor Presentation		
☐	19. Develop Sponsor presentation PowerPoint from template.	Facilitator Team Members
☐	20. Finalize Sponsor presentation and identify sections for individual Team Members.	Lean Project Team
☐	21. Present to Sponsors process map discoveries, root causes, metrics and proposed solutions for approval.	Lean Project Team
Phase 7: Action Plans		
☐	22. Determine resource needs for proposed solutions.	Lean Project Team
☐	23. Develop detailed Action Plans (template available) for approved solutions (what, why, how, who & when). **Note**: Ahead of presentation to Sponsors, Team may want to engage the Champion Sponsor in review of Action Plans.	Lean Project Team
☐	24. Present Action Plans and resource needs to Sponsors for consideration, modification and approval.	Lean Project Team
Phase 8: Implementation and Measurement		
☐	25. Outline implementation plan, timeline and potential training needs.	Lean Project Team
☐	26. Engage operational units for support/assistance with implementation.	Team Leader

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☐	27. Identify cadence for solution measurements for tracking results of solutions implemented.	Team Leader Lean Project Team
☐	28. Implement solution(s).	Lean Project Team
☐	29. Team Leader to communicate back to Lean Project Team successes or challenges with implementation plan. Schedule Lean Project Team work session to review and discuss. Identify solutions to problem(s).	Team Leader
☐	30. Team Leader to analyze and communicate solution metrics to Champion Sponsor and Lean Project Team.	Team Leader
☐	31. Formal celebration and recognition for project success!	Lean Project Team Champion Sponsor Facilitator
☐	32. Annually revisit process – adjust, modify if needed.	Lean Project Team