LEANOhio

KAIZEN EVENT **SCOPE** DOCUMENT

This scope document sets the stage for a successful Kaizen event. It gathers all key information in one place. It's completed by the event sponsor and team leader, with guidance from a LeanOhio facilitator.

To save this form with the data you type into it, you will need Adobe Reader 8.0 or higher. Most computers have the required version. If you are unsure which version you have, try saving the form and see what happens. Reader can be freely downloaded at http://get.adobe.com/reader/

CONTACT

1 Agency

2 Within the Agency, which Division, Program, or other work area is taking the lead on this event?

3 Main agency contact for this Kaizen event:

Name   Title   Phone   Email

OVERVIEW

4 What process is this Kaizen event intended to improve?

5 A Kaizen event should help an organization achieve its top goals or objectives.
What major goals/objectives serve as the basis for the Kaizen even that is being proposed?

6 Separate from the goals/objectives, what is happening that shows the importance of the proposed Kaizen event?
What problem or problems are apparent? What can be seen that makes clear that improvement is needed?

7 What are the top three intended outcomes for this Kaizen event?

1

2

3

PROCESS →

PROCESS

8 Who is the primary customer of the process that this Kaizen event aims to improve?

9 What does the customer get from the process? In other words, what does
the process deliver to the customer in terms of an output or outputs?

10 Are there are additional/secondary customers? If so, write them here:

11 In order to scope a Kaizen event, the beginning and end points of the process need to be clearly defined.

What is the *first* step in the process?

What is the *last* step in the process?

12 With every process, there are "inputs" from various sources that staff use to complete their work.
Problems can occur when these inputs are delayed, inaccurate, incomplete, and so on.

For the process that will be the focus of this Kaizen event,
what are some of the key inputs, and where do they come from?

INPUT	SOURCE
EXAMPLES:	
Application information	*Completed applications submitted by applicants*
Monthly budget numbers	*Finance*
Test results	*Lab*

13 If there have been changes made to the process over the past 12 months, describe them here:

MEASUREMENT →

MEASUREMENT

In a Kaizen event, team members use data and measurement at every step: to analyze the current situation, identify the extent of delays and other forms of inefficiency, evaluate the impact of proposed action steps, and develop projections that show the impact of the newly designed process.

Many baseline-related numbers can and should be gathered in advance of the Kaizen event.

14 Fill in as many of the following measures as possible.

MEASURE	CURRENT LEVEL or QUANTITY
Number of customers for the process that's the focus of the proposed Kaizen event	
Number of incoming items (inputs) for a given time period	
Number of completed items (outputs) for a given time period	
Size of the backlog (typically measured in number of units, such as the number of applications waiting to be processed)	
Provide any available information or data relating to the following additional measures	
Process time	
Cost	
Delays	
Error rate	
Inventory	
Other (fill in)	

15 If you have recently conducted a customer survey or used some other approach for assessing customer satisfaction, describe the results. Include specific measures such as satisfaction ratings.

After completing this section on measurement, you might have a different way of phrasing your top three intended outcomes for this Kaizen event. The prompt for this was at the bottom of page 1. Feel free to scroll up and revise what you wrote.

PEOPLE

16 Build a roster for this Kaizen event.

NAME	TITLE	AGENCY	PHONE	EMAIL
Team Sponsor(s)				
Team Leader(s)				
Team members from the agency that's taking the lead on this Kaizen event:				
Team member(s) from other state agencies:				
Many teams include a customer. This ensures that the customer perspective remains prominent as the Kaizen event unfolds. If a customer (or two) can be available for this event, write their name(s) below:				
With most Kaizen events, there's a team member who is not from the work area and doesn't know much about the process. This person provides a fresh and objective perspective. For this Kaizen event, who will fill this role?				
Subject matter experts are people who can provide special expertise that might be needed by the team during the week of the Kaizen event. These expert can be from IT, legal, finance, HR, engineering, etc. They are aware of the Kaizen event and ready to make themselves available if needed. List any possible subject matter experts below:				
Facililitators for this Kaizen event:				

SCHEDULE

17 Dates for the Kaizen event

A Kaizen event typically fills one full work week, from Monday until noon on Friday.
All team members are expected to be present from start to finish.

18 Date for report-out presentation

This concluding presentation, in which all of the team members have speaking roles,
is on the last day of the week-long Kaizen event, typically from 11 a.m. to noon on Friday.

19 Date for *first* follow-up session

This meeting is usually 30 days after the Kaizen event. Attended by all team members, it lasts 1-2 hours.

20 Date for *second* follow-up session

This second update session occurs 60 days after Kaizen event.

OTHER

21 Describe any legal or rule-related boundaries that need to be kept in mind as the Kaizen event unfolds:

22 What potential issues could become roadblocks to success for this Kaizen event?
Consider possible factors that might arise before, during, or after – including the level of support
for change, the organizational culture, budget issues, communication issues, and so on.

23 If there are additional considerations, constraints, or concerns, describe them here: