

## “Is it Lean?” Checklist

The purpose of this checklist is to help determine if your opportunity for improvement should be addressed as a Lean Process Improvement or if another approach is appropriate.

### Question 1: “Is it Lean?”

A Lean approach may be appropriate if:

- You are trying to standardize multiple methods into a single way of doing things.
- It involves a work process.
- No single person fully understands the entire workflow.
- There are bottlenecks and/or places in the process where people are waiting.
- Efforts are being duplicated in the process.
- There are lots of steps and/or handoffs in the process.
- Errors or mistakes are being made. Work has to be done over.
- The process takes longer than it should (in the customer’s opinion or compared to other organizations).
- Inventory is an issue – Lots of materials, supplies, or completed items are being stored.
- There seem to be a lot of phone calls, emails, and/or leaving work stations necessary to get work done.
- Customers get more (product or service) than they requested or need.
- There is too much work to do. People are behind and seem to be working too hard or too many hours. They are burning out.
- The work processes are complex. The work is really hard to do.
- There are aspects of the process that only one person knows how to do.
- There are parts of the process that people personalize and do their own way.
- The amount of work fluctuates. The pace of the work is irregular.
- Safety is a concern. There are injuries and/or close-calls.

A Lean approach may not be appropriate if:

- The issue is primarily related to supervision, performance, or corrective action.
- Another Human Resource issue is in question.
- Strategic decisions or leadership approach are central to the issue, rather than process.

## Question 2: Is it a “Lean Project” or a “Just Do It” improvement?

Now that you know your issue can be addressed with a Lean approach, you need to determine if it is a “Lean Project” or a “Just Do It” improvement.

While every Lean improvement should be vetted through the Plan-Do-Check-Act Cycle, not every process improvement requires a major, formal Lean project with a large team, 5-day workshop and extensive implementation phase. Some process improvements are smaller in scope, allowing the process for root cause analysis, identifying and testing a solution, and implementation to be quicker and easier. The tool below lists some factors to consider for evaluating your improvement opportunity.

Is it a “Lean Project”?	Is it a “Just Do It” Improvement?
Potential cross functional impact.	No cross functional impact.
Complex issue with multiple steps and hand-offs.	Simple issue with few steps and hand-offs.
Large dollar amounts involved in process.	Process costs are limited.
Customer input needed to understand process and impacts.	Little or no customer input needed.
Unclear impacts.	Clearly understood and agreed upon impacts.
Solutions require cross-functional teams to implement.	Solutions are potentially quick to implement.
Changes are potentially difficult and complex.	Affects something simple and easy to change.
Involves multiple processes.	Involves single process.
Person with authority over process is high up on organization chart.	Person with authority over process is close to the work itself.
No one person knows the whole process	One or two people know the whole process

If you have further questions, contact the [Process Improvement Program](#) to discuss your opportunity for improvement and how best to proceed.