

GUIDE TO IMPLEMENTATION REPORTS

LCS Level 2

1. INTRODUCTION

For LCS level 2 the evidence of the practical implementation of lean knowledge should be formalised through the submission of an implementation report, which should clearly document how the candidate has successfully implemented a lean/continuous improvement (CI) initiative or project, demonstrating appropriate leadership, knowledge and lean thinking expertise.

A leadership role is one where the candidate is involved in the planning, delivery and management aspects of the project, with accountability for its results.

The project will have significance through, for example, a value stream dimension or end-to-end scope, and have strategic linkage – that is, aligned with organisational goals and with an impact on the organisation’s strategy.

2. PROJECT CHARACTERISTICS

A Level 2 project or initiative will typically be characterised by the following:

- a) The candidate should be involved in the project’s design and development.
- b) The project should focus on the implementation and sustaining of appropriate internal and/or external improvements.
- c) The candidate’s role should be one of management and leadership, for example managing a team, with communication, planning, performance and control responsibilities.
- d) Note that the word ‘lean’ does not necessarily have to feature explicitly. If the project aimed to achieve some of the following (not necessarily all), then it can be considered suitable:
 - Release/create capacity
 - Enhance, add value for customer/stakeholders
 - Reduce waste
 - Improve throughput, flow; compress time
 - Improve quality
 - Innovation, product/service development
 - Engender CI behavioural change

3. PROJECT TIMING

The project can have been undertaken within (approximately) the last three years. It could be a current project, though it will need to have delivered sufficient meaningful results for it to be written up fully and evidence of sustainability may be limited.

4. REPORT FORMAT & STRUCTURE

INTRODUCTION

The project can be presented as a standard business report or in an A3 format.

Note that confidentiality aspects and circulation restrictions should be clearly stated and note that standard LCS policy is to keep all submitted information confidential with no further communication or dissemination.

BUSINESS REPORT CONTENT

A standard report structure should contain the following sections:

1. Executive Summary
2. Aims & Background
3. Description, Method
4. Results & Analysis
5. Conclusions & Sustainability

Typical content for each section is shown below, though this is not prescriptive, and alternatives may be appropriate.

PROJECT AIMS & BACKGROUND

- Overall context of the project
- Business need, strategic linkage
- Problem statement
- Quantified objectives (eg quality, cost, delivery related)
- The role of the candidate in the project, dates etc

DESCRIPTION, METHOD

- Outline the overall approach taken
- The methodology adopted - including specific tools and techniques employed
- Data analysis undertaken
- Organisation of the project
- Project management approach adopted

- People/resourcing etc – eg who was involved, other resources used

RESULTS & ANALYSIS

- The results of the project, especially relating to the achievement of the original objectives
- Methods of evaluation used
- Evidence of the results
- Other benefits (intended or not intended)
- Issues that arose (resolved or unresolved)

CONCLUSIONS & SUSTAINABILITY

- Description of the actions put in place taken to ensure the lean improvement could be sustained.
- Summary the overall project experience; critical reflections and lessons learned
- Outline further work required, or the next stages required to continue the improvement into new or related areas

ENDORSEMENT

- By an appropriate stakeholder (eg line manager, project sponsor, customer) confirming that the report provides an accurate account of what took place and resulted.

APPENDICES

- Supporting information (eg data, charts, images, etc)

LENGTH

The guideline is 2,500 to 5,000 words for a business report submission, though this is not prescriptive, especially as the use of tables, charts, maps, etc makes simple word count less relevant.

A3 FORMAT

An A3 format can be used to record the project and an example template is shown in Appendix I. Note that it does not have to be followed by the letter and can be adjusted to meet specific requirements, though it should follow PDCA principles.

Supporting information, such as value stream maps, data, charts, and images, can be appended to the A3 if necessary.

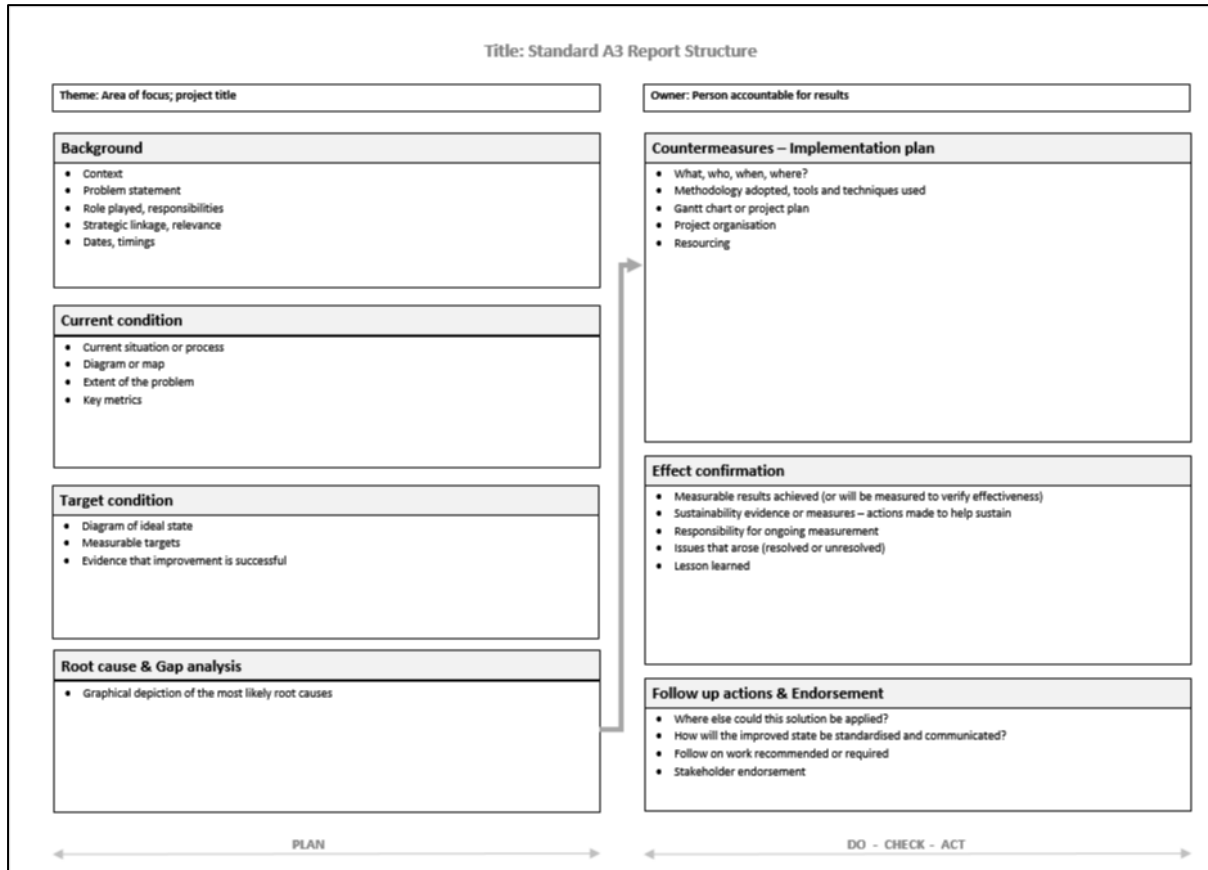
5. PROJECT ASSESSMENT

The project will be reviewed and assessed in terms of the evidence that indicates:

- It was strategic or transformational in nature.
- The candidate had a high level of planning and design responsibility.
- The candidate had a meaningful leadership role and implementation responsibility.
- That advanced methods and appropriate lean tools and techniques were used.
- That the project led to significant results and had a positive, sustainable impact.

6. APPENDIX I

A3 TEMPLATE EXAMPLE



This template can be downloaded as a Word document from the LCS website.