



Lean Office Facilitator Program

Overview:

The Lean Office Facilitator program combines class room learning with practical application of Lean tools to deliver business results. The candidate will develop competence by experiencing rapid improvement in a hands-on environment. The candidate will learn how to lead teams to rapidly implement world class principles of Lean Office through Kaizen Event facilitation. This program will teach the candidate how to:

- Develop an improvement plan based on Value Stream Maps
- Identify and eliminate wasteful transactions and process steps
- Understand Lean Office tools and the steps to implementation
- Develop Standard Work in transactional processes
- Motivate staff by developing a sense of ownership and empowerment
- Have a vision for what “good” looks like for a Lean office

Program Objective:

At the successful completion of this Lean Office Facilitator program the candidate will be able to identify opportunities to improve processes by applying Lean Office principles, provide training for staff in the basics of Lean Office, and implement Lean Office principles as a facilitator of rapid improvement Kaizen Events. The successful candidate will be certified by Gemba to teach and facilitate rapid implementation of Lean Office as an internal consultant and trainer at your company.

Program Structure:

This program is offered as an in-house program to develop the skills and competencies of your internal Lean trainers and facilitators. This program combines class room training and actual hands-on rapid improvement workshops using the Kaizen Event format. The majority of the work will be done on-site at your company, with the optional off-site initial class room training.

- Classroom training (4 days)
 - On-site at your company
 - Off-site at our training center, includes Lean Office tour & case study
- Pilot area selection (2 days)
 - On-site at your company
- Kaizen Events (4 events, 5 days each)
 - On-site at your company
- Program Summary (1 day)
 - On-site at your company



Qualifying for the Lean Office Facilitator Course:

All candidates for this program must fulfill the conditions below in order to qualify for this course:

1. The candidate has an executive sponsor prepared to provide:
 - a. The time for the candidate to attend all of the training and workshops
 - b. The funds required for the program
 - c. Access to a value stream to apply Lean Office principles and measure the results
 - d. Commitment to implementing and testing all practical and sensible ideas
2. The candidate has completed training in, or is concurrently being trained in:
 - a. Train the Trainer
 - b. Change Management
3. The candidate has
 - a. Basic familiarity with Lean Office principles through self-study or training
 - b. An understanding of today's challenges at your company in the transactional and knowledge work processes
 - c. An understanding of their company's specific goals and challenges
 - d. An open mind



Certification:

During the Lean Office Facilitator program, instructors will provide the candidates with class room training, Kaizen Event facilitation, and individual coaching, and mentoring on-site and online as they progress through the program. Certification is provided upon successful completion of the class room training and homework assignments, passing the Final Self-test, participation in four Kaizen Events (2 led by a certified facilitator, 2 lead by candidates themselves) and completion of Lean Office implementation project.

Class Room Training

The candidates are required to complete class room instruction or have prior training and practical experience in the following subjects:

- Teaching Lean Office Fundamentals
- The 7 Wastes of Transaction
- Value Stream Mapping & Business Process Mapping
- Kaizen Event Management
- Time Observation
- Workflow Analysis
- Just in Time Transactions (Takt, Flow, Pull)
- Office Flow Simulation
- Standard Work
- Visual Management

Kaizen Event Management

The candidate will practice the Kaizen Event Management process and participate in of four Kaizen Events, leading 2 of these. Kaizens will be on-site at your company.

Homework

Between each class and Kaizen Event, the instructor will assign homework to be completed prior to the next session. This may include:

- Reading of assigned articles, book chapters, and training materials
- Completing Self-tests
- Completing of Kaizen Event Management activities
 - Preparing for Kaizen Events
 - Following up
 - Measuring and documenting results
- Practice using Lean tools at your company, such as
 - Conduct a 5S workplace organization in one area
 - Create Business Process Maps
 - Perform Time Observation
- Implementing Lean tools learned
 - Copy ideas learned in class or during Kaizen Events and expand them to other areas of your company



Project Work

- Completion of Lean implementation in one Value Stream through Kaizen Events
 - Participate in a total of four Kaizen Events
 - Act as Team Leader for two of the four Kaizen Events
 - Document the results of the project
 - What was the situation before?
 - What action was taken?
 - What were the results?
 - What are the next steps?
 - What is required for Lean Office to succeed at your company?

Final Self-Test

- After “kaizen #4” or the completion of the class room work and three Kaizen Events, candidates will take the Final Self-test
- The instructor will review results with the individuals and provide additional coaching

Benchmarking Tours

- The candidate will visit five “world class” facilities outside Your company within 12 months of starting the Certification program
- This can be done through arrangement with Gemba or by your company



Course Timeline:

The Lean Office Facilitation Program is typically conducted over a 24 week (6 month) period. The course content covers 150 hours of class room, hands-on Kaizen workshops and Project Work. The course includes 4 days of classroom training, 2-days of on-site preparation and pilot area selection, and four one-week long Kaizen Events held in the factories combining practical learning and delivering actual business results. The Kaizens Events are typically held 4 to 6 weeks apart. The first two Kaizens are led by a facilitator and the candidates participate first as team members, then as team co-leaders. During the second two Kaizens, the candidates take on the role of team leader, and then as facilitators of one or more teams with team leaders.

Month 1: Lean Office Facilitation Training (4 days)

Option 1: On-site at your company

Option 2: At our training facility in Washington State (includes Lean Office benchmarking tour & case study)

Pilot Area Selection (2 days)

Select pilot area, walk through value stream, and communicate with stakeholders in the area

Month 2 - 3: Kaizen Events, Led by Gemba instructor (5 days, 2 events)

Kaizen Event #1: Value Stream Mapping and Waste Elimination

Candidate role: Be a team member. Observe how instructor facilitates.

Kaizen Event #2: Sustaining gains, Visual Management, JIT implementation

Candidate role: Be a team co-leader. Assist in some training.

Month 4-5: Kaizen Event, Led by candidate (5 days, 2 events)

Kaizen Event #3: Teach Lean Office Fundamentals, Value Stream Mapping

Candidate role: Be a team leader. Train one or more modules.

Kaizen Event #4: Teach Lean Office Fundamentals, Value Stream Mapping

Candidate role: Be the facilitator. Train solo.

Month 6: Lean Office Program Summary (1 day)

Final review of projects, self-test, individual coaching, planning next steps

During the time in-between the planned training sessions and Kaizen Events there will be "homework" assigned for the candidates to follow up on kaizen events, prepare for the upcoming kaizen events, train your company staff in Lean principles, and map the business processes. This work will be evaluated by your Gemba instructor online and during face to face sessions.



Course Content:

Teaching Lean Office Fundamentals

As a successful Lean Office instructor or Kaizen Facilitator, the first day of a Kaizen Event (training) is your opportunity to introduce new ideas to your team members and motivate them to take action to meet their objectives. It is essential that your presentations be professional, engaging, and relevant. You also need to be confident your knowledge and able to answer challenging questions, such as:

- What is a Lean Office?
- Why Lean Office?
- What are the 7 Wastes of Transaction?
- What is the benefit of 5S for the office?
- How do we improve quality in transactional work?
- How do we improve response time in transactional work?

This module covers the definition of Lean Office, a brief history, the philosophy, methods, and tools to improve any business process. Emphasis will be placed on understanding the need for Lean Office and hands-on practical learning using the factory flow simulation.

- Lean Office and Kaizen training content required to build team awareness and support at the start of each Kaizen event
- Presentation, training and teaching skills
- Preparation techniques for training to ensure effective learning by your audience
- Using interaction, simulation, and exercises to reinforce key concepts
- Role playing to answer common questions you will receive from the people you are training

As a Lean Office instructor, you must do more than present information. You must teach and motivate each person by opening their eyes to the potential of Kaizen and Lean Office.

Lean Office Tools In-depth

The successful candidate will learn theory and application of the following Lean Office tools and be able to teach them with confidence. This will be accomplished through a combination of class room learning and hands-on learning in Kaizen Events.

Value Stream Mapping & Business Process Mapping

This module covers all you need to know to successfully get started with mapping your Value Streams in an Office environment. The steps, the symbols, and the mechanics of Value Stream Mapping will be learned through hands-on small-group mapping sessions. We will also introduce Business Process Maps and other mapping tools and explain when it is appropriate to use each one. There is time for question & answer sessions, review of frequently asked questions, and a review of Lean principles applied to Future State Value Stream Maps.



Time Observation & Workflow Analysis

This module teaches the industry standard practices of time study and how the time data collected can be used for setting standards, creating work instructions, job method design and generating ideas for continuous improvement. The work analysis methods will help the participants recognize waste in the system and come up with ideas to improve their work.

Just in Time Transactions

This module teaches the theory, application, challenges, and benefits of implementing Continuous Flow, Downstream Pull and Takt Time. The topics of manpower calculation, balancing, smoothing transactional workflow, early defect identification and the impact of set up and preparation times will be discussed. Participants will learn to work with all of the tools included in the Takt Flow Pull Work Design (JIT Tool Kit) through small group activities.

Standard Work

This module provides an in-depth understanding of Standard Work as a core principle of Lean in any environment. Emphasis will be placed on understanding Takt Time, Work Sequence, and Standard WIP and how they apply to various transactional processes. Hands-on small-group sessions will focus on using Standard Work Sheets and Standard Work Combination Sheets.

Visual Management

This module builds on the foundation of 5S, One-piece Flow and Standard Work by providing practical tools to quickly understand what is happening in the information flow. Emphasis will be placed on learning a variety of simple and visual tools and how and where they can be used.

Additional Curriculum

As requested, we can incorporate additional Lean tools and competencies into the program in order to provide the Lean Office Facilitator candidate with the necessary skills and competencies to implement Lean at your company.



Kaizen Event Management

This module provides the candidate with an in-depth understanding on how to follow the Kaizen Event Management methodology for rapid improvement. Emphasis is placed on project selection, team selection, resource planning, the Kaizen Event 'day by day', and follow up to sustain the gains made.

The candidate will practice using the week by week, day by day, and hour by hour checklists for Kaizen preparation and facilitation. This course will teach the methodology through all four phases and have participants put the Lean tools into practice:

1. Preparation
2. Facilitation / Participation in Kaizen Events
3. Presentation of results
4. Follow up

Kaizen Event Management Learning Objectives:

Upon successful completion of the Lean Office Certification program, participants will be able to:

- Explain Kaizen as it is done in Japan and the West
- Describe what a Kaizen event will and will not accomplish
- Gain hands-on experience in applying Lean tools
- Understand requirements for the Kaizen Event Facilitator and Team Leader
- Select projects of appropriate priority and scope
- Prepare the company work site for the Kaizen Event
- Understand how to set goals for the Kaizen Event
- Follow Kaizen team selection guidelines to form effective teams
- Measure results and present business case for change
- Effectively engage management to follow up and sustain Kaizen results
- Use Kaizen to gain involvement of the workers and motivate change

During the class room training the candidate will complete the class room learning of all Lean Office fundamentals and tools in theory. The Gemba instructor will reintroduce and reinforce these Lean principles and tools at the appropriate times during the Kaizen Events.

Kaizen Event Structure

The Kaizen Event is a focused rapid improvement team activity. Teams are typically 5 to 8 people per topic (multiple topics per event are possible). Team members are dedicated to the Kaizen Event during the 5 days. Kaizen team members will receive some training and spend 80% to 90% of their time in hands-on improvement work. This includes observation, analysis and redesign of actual work as well as practical application of Lean principles to transactional processes. The Kaizen Event will test and implement an improved method of work through actual demonstration, timing, and testing. The Kaizen team summarizes results on Friday, creates an action plan to complete all actions needed to fully integrate the new process, and insure ongoing management support.