Preparing for the Kaizen Event

Overview

OK, in our last module we learned about the different kaizen team roles. Now let’s see how these different roles work together in harmony to plan and prepare for the actual kaizen event. We’ll be using the kaizen event timeline as our roadmap which, again, is available for download in the resources section of the website or DVD.

Now as we see to the right, there are 6 weeks of activity. 2 of the 6 weeks are focused on preparing for the event, 1 week is the event itself, and 3 weeks are for post event activities.

We’ll dig deep into each of these areas… but for this module we’re going to focus on the first two weeks of the kaizen event timeline.

Not Full Time

Before then I do want to point out that while we’re showing 6 weeks of work the 2 preparation and 3 follow-up weeks are not full time work. With this said, while the preparation and follow-up phases don’t require full time support these 5 weeks are absolutely critical since, done poorly, the actual kaizen event week could turn out to be a waste of time and effort.

Week 1 Activities

The first three activities noted on the timeline are to select the project, determine the scope of the event, and to develop the team charter.

Obviously, these are easy tasks to list in a spreadsheet but much harder to do in real life. Luckily, as a student of the Gemba Academy you are well equipped to take these tasks on since they are explained, in great detail, in several Gemba Academy courses. Specifically, our Transforming your Value Streams and Practical Problem Solving courses will equip you with
the knowledge you need to know in order to break down a big and potentially vague problem into more manageable problems that can be attacked via kaizen events.

So, if you’re not familiar with the information taught within these courses I’d like to encourage you to check them out before attempting to scope and select a kaizen event.

The next topic listed in the timeline is data collection. Now, in order to select the right project some aspect of data collection will need to have already happened. But it’s important to ensure this data is clear and concise and ready for the kaizen team to use during the event.

Additionally, you may need to do some extra data collection, including things like video taping a process before the event begins. This isn’t to say you can’t do these types of things during the first few days of the actual event… but the more you have done before the event starts the better off you’ll be.

The next actions on the timeline deal with kaizen team member and kaizen team leader selection… two extremely important tasks!

First, we recommend keeping your point kaizen team to no more than 10 people, preferably 6 to 8. Research shows that the larger a team grows the harder it becomes for them to make decisions and function as an effective problem solving group.

Additionally, it’s vital the top experts be part of the kaizen team. And by experts I mean the folks who do the type of work being focused on each and every day.

In manufacturing environments this may be machine operators, in office environments this may mean administrative assistants and accountants and in healthcare settings this may mean nurses and healthcare aids.

You will also do well to add a few functional type roles such as manufacturing engineers and maintenance professionals to the team as well. Another excellent idea is to ask someone from a completely part of the business to join the kaizen team.

So, if your event is planned in manufacturing you may ask someone from the finance department to join the team since they will be able to look at the process from a different perspective. These folks often add tremendous value since they ask a lot of “why” questions like why do we do it like that?

An easy way to keep a good balance of team members is to think of the one third rule. A third of the team members should come from the work area being focused on, a third from upstream and downstream processes, and a third of the team should come from completely outside the process.

The next role that must be selected is the kaizen team leader. This person should be experienced with continuous improvement tools, but doesn’t have to be an expert lean practitioner. They should also be a good facilitator even though they are more than likely still “in training” as it relates to kaizen facilitation.
Once the team and team leader have been selected it’s time to set the timing of the actual event. We suggest allowing the senior leaders of the organization set the date so everyone in the organization understands the commitment to kaizen is coming from the top of the company.

While it may not be necessary to create a detailed Microsoft Project Gantt chart we do recommend you at least identify a daily plan. Of course you’ll need to remain flexible during the actual event since a kaizen event is extremely dynamic in nature.

Along these same lines it’s important for the kaizen team leader to ensure he or she clearly understands the expectations of management for the kaizen event. Doing this early in the process is very important so there are no surprises later in the process.

The next task is for the kaizen team leader to ensure all facilities preparation is taken care of. This includes everything from supplies the kaizen team feels they need to succeed during the event to organizing a meeting room and any meals the kaizen team will need during the week.

The last week 1 item the kaizen team leader will be responsible for is preparing the kaizen team package which will include things like any training material handouts needed for the first day of the event. Additionally, the package normally includes a letter to all team members offering an explanation of what the kaizen event objective is, who is on the team, and what to expect during the event.

**Week 2 Activities**

Week 2 of the kaizen timeline is mostly focused on communication as the purpose of the event is communicated across all levels of the organization. Next, preparation for the kickoff meeting is taken care of which includes things like booking meeting rooms when applicable while ensuring all stakeholders are invited to the meeting.

Finally, the last thing the team leader will do is check in one last time with the kaizen coach in an effort to make sure nothing’s been missed.

At this point, the team is now ready to start the actual kaizen event. Obviously, there’s quite a lot to do in preparation for the event so while we show this preparation phase taking two weeks you may choose to spread this process over 3 and possibly 4 weeks especially if your organization is new to the kaizen event approach.

The key to being successful at kaizen is to do a thorough job planning while also remaining flexible and ready to make adjustments on the fly once the event starts.