

Purpose

The lean champion manages the transformation of a business into a lean enterprise on behalf of the initiative's sponsor.

Overview of Responsibilities



Description of Responsibilities

A. Educate Self and Others on the Lean Approach to Commerce

The purpose of this duty is to ensure that you and others who are involved in the lean transformation understand the lean approach to commerce.

Master the Lean Approach to Commerce

Understand lean's goal, strategy, concepts, and methods. Know the business results that lean can produce. Learn what conditions must be satisfied for these results to be achieved. Know how businesses typically use lean thinking. Be able to explain what the full adoption of the lean approach to commerce means in concrete terms and how it differs from the typical way businesses incorporate lean thinking. Become knowledgeable about how a lean enterprise is structured, how it engages and involves its people in creating and sustaining its success, and how it configures its human resource systems (selection, development, appraisal, pay, promotion, incentives, and awards). Learn how a lean enterprise extends itself outward to incorporate its suppliers and customers in pursuing lean. Know about the obstacles that can impede the emergence of a lean enterprise and the ways in which these obstacles can be overcome. Learn about enabling factors within a business that the business can leverage to accelerate its adoption of lean. Know the types of roles and structures (e.g., the lean champion role, the core lean team, and the lean steering team) used to guide a business's adoption of the lean approach to commerce.

Educate Others on the Lean Approach to Commerce

Educate owners on the lean approach to commerce. Assist the sponsor in engaging, educating, and energizing people's interest in the lean approach to commerce. Do this by making presentations, conducting instructional workshops, doing demonstrations, holding informal meetings and conversations, and composing and distributing literature, memos, and other educational materials. Look for opportunities to introduce lean concepts and methods, and link these concepts and methods to circumstances the workforce has encountered. Show how the concepts and methods of the lean approach to commerce can change current practices. Educate people at every role level (executive, managerial, supervisory, and non-supervisory) about the content, expectations, and requirements of their roles in creating and sustaining a lean enterprise.

B. Focus and Conceive the Lean Transformation

The purpose of this duty is to define the goal of the lean transformation and develop an action plan to implement it. The following tasks implement this responsibility

Complete a front-end analysis of the business to be transformed. Profile its current business intent—namely, its purpose, vision, and core values. Also profile its product or service offering, business model, current level of success, and current strengths and opportunities for improvement. Learn its organizational structure, management approach,

and culture. Assess the discrepancy between the business's current organizational structure and the rationalized structure it would require to become a lean enterprise. Identify and evaluate the readiness of each key stakeholder to support the lean approach to commerce. Assess the status of the business and its marketplaces against the requirements for adopting the lean approach to commerce. Determine the feasibility of successfully implementing the transformation of the business to a lean enterprise.

Construct a goal for the lean transformation and an action plan to achieve it. Work through your lean initiative proposal with the initiative's sponsor. Once approved, work through the proposal with each of the business's key stakeholders. Make clear to stakeholders the requirements for successfully completing a lean transformation, including the requirements concerning who will need to be involved, what criteria they must meet to fulfill their roles, what resourcing will be needed, and what the ground rules for decision making and action need to be. Conclude with an agreed-upon approach to implementing the lean initiative. Reassess the feasibility of the lean transformation's success if substantive changes have been made to your goal and action plan. Advise the sponsor on whether to proceed with the lean initiative's goal and action plan in its final form.

C. Involve All Stakeholders in Supporting the Lean Initiative

The purpose of this duty is to engage all stakeholders in constructively participating in implementing the lean transformation. The tasks implementing this duty include the following.

Identify the stakeholders in the targeted business. Learn each stakeholder's expectations and requirements for participation in establishing a lean enterprise. Engage stakeholders and show understanding of each stakeholder's interests, expectations, and concerns as related to the business's adoption of the lean approach to commerce. Involve stakeholders in supporting and accomplishing the lean initiative. Respond to queries from stakeholders promptly. Evaluate and resolve complaints from stakeholders. Obtain feedback from stakeholders regularly on how well they feel their expectations and concerns are being addressed. Detect and resolve problems that emerge among or between stakeholders that affect the lean initiative. Sustain stakeholder involvement continuously throughout the initiative.

D. Build, Lead, and Support the Lean Initiative's Implementation Teams

The basic implementing structure for a lean initiative includes a core lean team and a lean steering team.

Core Lean Team

The function of a core lean team is to extend the capabilities of the lean champion and speed the completion of tasks that can be performed in parallel. Team members report to the lean champion and assist him or her in accomplishing the duties and tasks of the lean champion role. Core team members may educate other employees about lean; train employees in leading lean tool applications; monitor and coach lean action teams;

and measure, analyze, and report the initiative's status, progress, and results or perform other important duties. In every case, their work directly ties to the lean champion role, and they work under the lean champion's direct supervision.

The lean champion must establish a job profile for the core team member role and written procedure for recruiting, screening, and selecting team members. Team members should be drawn from the business employees. Be certain to provide all employees an opportunity to apply for team roles. As to the permanency of core lean team members, we strongly advise making team membership a rotational assignment. Deploy employees to these roles for a fixed period of time, perhaps for three to six months. Rotate them back to their work units when the period ends. Stagger the rotations so that only a portion of the team is replaced at any one time. Using this approach opens the core team to the widest possible participation by employees and broadly disperses lean expertise throughout your workplace.

Lean Steering Team

The lean steering assists the lean champion in ensuring that the lean initiative succeeds by working together to accomplish responsibilities critical to managing the business's adoption and implementation of the lean approach to commerce. Its membership is made up of the business leadership team and representatives from the business's key stakeholders, including the business's nonmanagement employees. The lean champion chairs the team.

The lean champion is responsible for building, leading, and supporting the lean steering team. In performing this duty, the lean champion leads the team in forming its charter and conducting its work. The team charter formalizes the team's goal and records the decisions of the team about how it will operate. Developing a team charter is a critical step in building any team since it sets a team's direction and accountability. Guidance for building a team charter is provided in the chapter *Task 5 Lead Meetings*.

E. Steward the Adoption of the Lean Approach to Commerce

The purpose of this duty is to execute the lean transformation action plan and ensure that it succeeds.

Coach the sponsor in his or her role as promoter and facilitator of the business's adoption of the lean approach to commerce

Orient the sponsor in his or her role. A sponsor promotes and facilitates the initiative's success by educating stakeholders and acting as the initiative's spokesperson. He or she must also model the behaviors expected of all members of a lean enterprise and act as an agent of change.

Ensure that the sponsor fully appreciates what adopting the lean approach to commerce means with respect to how the business will conduct itself and how it will be structured and managed. Assist the sponsor in carefully reviewing the contents of

Exhibit 5, pages 39–52, so that he or she internalizes the likely demands that the sponsor must satisfy in leading his or her business in adopting the lean approach to commerce.

Assess the sponsor's strengths and development needs with regard to fulfilling the role of sponsor. Engage the sponsor in activities that eliminate his or her development needs. Coach the sponsor in educating stakeholders about the lean approach to commerce and acting as lean's spokesperson. Support the sponsor in fulfilling his or her educator and spokesperson duties. Be sure, however, that you provide this support in a manner that does not detract from the sponsor's visibility or perceived ownership of the initiative. Support the sponsor in fulfilling his or her role as a model and agent. Provide the sponsor feedback on the his or her performance of the sponsor's role, and work together to learn from that performance ways to improve it.

Ensure the successful completion of the lean transformation action plan

Ensure the readiness of people, programs, and settings to implement the action plan. Manage the execution of the plan. Monitor its progress and achievements. Detect problems in its progress and act to eliminate them. Detect opportunities to accelerate its progress and realize them. Monitor the business's implementation of the lean approach to commerce. Act to remedy any deficiencies in its adoption. Close out the transformation project when the action plan's goal has been realized.

F. Measure the Results of the Lean Transformation and Use Them to Achieve Success

The purpose of this duty is to learn from your performance as manager of the lean transformation and use that learning to elevate your success. The tasks implementing this duty include the following.

Develop complete success criteria statements for each success anchor listed in the lean transformation action plan's goal statement. Ensure the regular collection, recording, validation, summary, and evaluation of the information reporting the status of the initiative on each of its success criteria. Extract learning from the analyzed performance information and apply it to improve the initiative's progress and achievement. Summarize the evaluation findings for reporting by the initiative's sponsor to all stakeholders.

G. Support the Sponsor in Sharing Information About the Initiative's Progress and Results

The purpose of this duty is to support the sponsor as the lean transformation's spokesperson. The tasks implementing this duty include the following.

Support the sponsor in ensuring that all employees and other stakeholders receive continuous updates about the lean transformation's goals, plans, progress, and results. Establish fact sheets and other basic communication materials to communicate the initiative's current progress and achievements. Create vehicles for broadcasting information and ideas

Appendix A

(e.g., a newspaper, bulletin boards, an intranet site, coffee talks, etc.). Create vehicles for gathering employee input and feedback on the initiative. Create the means for summarizing employee input and feedback and how they have been incorporated into the initiative's action plan. Evaluate the effectiveness of the information sharing efforts across the business, and use these findings to improve the sharing of information and ideas.

H. Perfect Your Performance of the Lean Champion Role

The purpose of this duty is to strive for perfection in the performance of your role. The tasks implementing this duty include the following.

Set increasingly demanding targets for achievement in the performance of your role. Measure your achievement against the targets set in your role's performance standards monthly. Use the Status, Reason, Learning, and Direction (SRLD)¹ method to extract learning from your performance and define ways to elevate it.

Outputs

Your performance of the lean champion role should produce interim and final outputs.

Interim Outputs

- A sponsor who successfully performs the sponsor's role
- Employees throughout the company educated on the lean approach to commerce and its potential to improve business success
- All other stakeholders educated on the lean approach to commerce and its potential to improve business success
- An action plan for the lean transformation shared across the business and with suppliers and customers
- Stakeholders satisfied with the manner in which they have been involved in the lean transformation and constructively participating in its completion
- Lean transformation action plan milestones accomplished on schedule
- Lean transformation action plan targets achieved as specified
- Lean implementation's core team members accomplishing their assigned tasks successfully
- Lean implementation's steering team accomplishing its purpose and reporting satisfaction with the support it has received from the lean champion
- Measurements and analyses of status information reported to all lean initiative participants at least monthly
- Learning is extracted from the initiative's measured performance and shared across the business
- Lean champion satisfying his or her role's performance standards

¹ See the chapter *Task 10 Learn and Share* for guidance on how to implement the SRLD method.

Final Outputs

- The business implements the lean approach to commerce as evidenced by the following:
 - It satisfies all the requirements and establishes and implements all the mechanisms needed to conduct commerce using the lean approach as described in *Executing a Lean Initiative* (pages 69–144).
 - It demonstrates the features of a lean enterprise as described in Exhibit 5, pages 39–52.
 - It produces the outputs of a lean enterprise as described on pages 22 and 23–24.

Competencies

Ten critical sets of competencies are repeatedly applied to successfully perform the lean champion role. Proficiency in the application of these competencies, as defined in the *Lean Champion Resource Guide* (Vitalo, Bujak, Vitalo, Patricia, and Ruffino, 2023), is required for successful performance of this role. With regard to each set of competencies, the level of possession required is the mastery of the constituent knowledge and skill contained in each set, as evidenced by their correct execution as defined in the *Lean Champion Resource Guide* and the production of each competency's expected outputs as specified in that source.

1. **Focus the lean initiative** – These skills enable you to understand the task you have been asked to perform and define where to implement the lean approach to commerce, what the initiative must accomplish, and how the initiative should proceed. They also enable you to assess whether the initiative is feasible.
2. **Involve stakeholders** – These skills enable you to identify stakeholders, understand their needs and expectations, and engage and sustain their support throughout the initiative.
3. **Understand customer values** – These skills enable you to identify the business's customer segments and its customers' spoken and unspoken values and support the use of this knowledge by the business as it conducts the lean approach to commerce.
4. **Lead meetings** – These skills enable you to plan and lead effective team meetings, evaluate their results, and follow up to ensure follow-through on team decisions and actions.
5. **Participate in meetings** – These skills enable you to follow ground rules, get informed efficiently about what others think and feel, and contribute information and ideas that advance each meeting's purposes.
6. **Solve problems** – These skills enable you to identify and describe a problem, analyze its root causes, and develop and implement actions to eliminate those causes.

Appendix A

7. **Make decisions** – These skills enable you to identify the goal of decision making, expand decision alternatives, identify deciding values, and use an evidence-based approach to choose the best alternative.
8. **Coach performance** – These skills enable you to profile a person’s role, provide performance feedback, identify development needs, and support employees in eliminating their development needs.
9. **Measure results** – These skills enable you to understand business measures, assess their utility, build a businesswide functional measurement system to support the conduct of lean commerce, and establish management dashboards.
10. **Learn and share** – These skills enable you to mine learning from performance, report progress, do briefings, and share information and learning across the initiative.

The Lean Champion Resource Guide provides tools to support your mastery of each of the above critical competencies. Exhibit 1 clarifies which competencies are needed to successfully execute each lean champion responsibility.

Exhibit 1. The Responsibilities of the Lean Champion Roles and the Competencies That Enable Their Successful Performance	
Responsibility	Critical Competencies
A. Educate self and others on the lean approach to commerce	<ul style="list-style-type: none"> ▪ Focus the lean initiative ▪ Involve stakeholders ▪ Understand customer values ▪ Lead meetings ▪ Participate in meetings ▪ Coach performance ▪ Measure results ▪ Learn and share
B. Focus and conceive the lean transformation	<ul style="list-style-type: none"> ▪ Focus the lean initiative ▪ Involve stakeholders ▪ Understand customer values ▪ Lead meetings ▪ Participate in meetings
C. Involve all stakeholders in supporting the lean initiative	<ul style="list-style-type: none"> ▪ Involve stakeholders ▪ Lead meetings ▪ Participate in meetings ▪ Solve problems ▪ Make decisions ▪ Measure results ▪ Learn and share
D. Build, lead, and support the lean initiative’s implementation teams	<ul style="list-style-type: none"> ▪ Focus the lean initiative ▪ Involve stakeholders ▪ Lead meetings ▪ Solve problems ▪ Make decisions ▪ Coach performance ▪ Measure results ▪ Learn and share

Continued ...

Exhibit 1. The Responsibilities of the Lean Champion Roles and the Competencies That Enable Their Successful Performance (continued)

Lean Champion Responsibility	Critical Competencies	
E. Steward the adoption of the lean approach to commerce	<ul style="list-style-type: none"> ▪ Focus the lean initiative ▪ Involve stakeholders ▪ Understand customer values ▪ Lead meetings ▪ Participate in meetings 	<ul style="list-style-type: none"> ▪ Solve problems ▪ Make decisions ▪ Coach performance ▪ Measure results ▪ Learn and share
F. Measure the results of the lean transformation and use them to achieve success	<ul style="list-style-type: none"> ▪ Focus the lean initiative ▪ Coach performance 	<ul style="list-style-type: none"> ▪ Measure results ▪ Learn and share
G. Support the sponsor in sharing information about the initiative's progress and results	<ul style="list-style-type: none"> ▪ Focus the lean initiative ▪ Lead meetings 	<ul style="list-style-type: none"> ▪ Participate in meetings ▪ Learn and share
H. Perfect your performance of the lean champion role	<ul style="list-style-type: none"> ▪ Measure results 	<ul style="list-style-type: none"> ▪ Learn and share

Access and Authorities

Access

- The lean champion must have access to all business decision makers to
 - assess their receptivity and readiness to implement the lean approach to commerce,
 - counsel them with respect to adopting the lean approach to commerce in their given business areas, and
 - coach their role performance so that it is consistent with the lean approach to commerce.
- The lean champion must have access to all stakeholders to engage, involve, evaluate, and sustain their support for the lean initiative.
- The lean champion must have access to all information related to the business's conduct of commerce.
- If the company is publicly owned, then the lean champion must have direct access to the board of governors.

Authorities

The lean champion must have the following authorities:

- Build and manage a budget to support the lean initiative.

Appendix A

- Expend resources consistent with the initiative's budget.
- Propose in which business to initiate a lean enterprise transformation and define its content and scope.
- Assess the feasibility of success of the lean initiative as approved by the business.
- Withdraw from the lean champion role, without prejudice, should the initiative as approved by the business not be feasible.
- Create forums throughout the company within which to teach and disseminate information and knowledge about lean enterprise.
- Specify adjustments to the business's key business enabling systems—including both human resource management and information management systems—so that they support the lean approach to commerce.
- Manage the performance of all people who are assigned responsibility for implementing the lean action plan with respect to their assigned task.
- Broker or develop and conduct training to meet the needs of the teams and individuals implementing the lean initiative.
- Build, lead, and support the lean initiative's core implementation and lean steering teams.
- Define measures and methods of measurement and implement measurements to assess and evaluate business achievement and lean's progress and results.
- Establish vehicles for the communicating information about the lean initiative (e.g., in-house newspaper, intranet site, videos).
- Disseminate verbal and written information to the workforce about the lean approach to commerce using a variety of methods (e.g., presentations, workshops, meetings, memos).
- Participate in the appraisal of business leaders (executives, managers, and supervisors) implementing lean by providing input about their promotion of and support for the lean initiative.

Resources

People

Nonsupervisors, supervisors, managers, and executives to form teams and perform roles, as needed, to implement the lean action plan.

Information

Information about the business to be transformed:²

² If there are multiple businesses to be evaluated before the target business is selected, then this list of information needs applies to all

- Its purpose, vision, and core values
- List of product or service offerings with a description of the regions within which each is offered and the end-use markets to which each is targeted
- A description of the enterprise's current business model
- The regions and markets within which it competes
- The key performance indicators and current level of success on each
- Its opportunities for future growth within the markets in which it competes
- The business's strengths and weaknesses as perceived by its leadership, workers, and outside analysts
- Strategic planning research, analyses, and recommendations for the company and its constituent businesses
- How its customers define value and their current level of satisfaction with what the business supplies
- The business's current organizational structure and management strategy
- How the sub-functions that implement the business operate (structure, work standards, operating measures, targets, current performance)
- The business's appraisal, bonus, and incentive systems from the executive level down

Other Information

- Accounting information, including the company's chart of accounts, the formulas it uses to compute financial ratios, and its most recent audit report
- Human resource management information, including descriptions of its selection, onboarding, training and development, appraisal, pay, promotion, termination, and incentive systems
- Information technology information, including a description of the company's enterprise data architecture and its business-enabling systems, their interfaces, and their interoperability
- Market analyses by product or service offering for each region and customer segment targeted
- Marketing materials for the business's offerings
- Survey information, including employee surveys (climate, morale, satisfaction, involvement), customer/client surveys, supplier surveys, and marketplace surveys

of them.

Appendix A

- Union or other contractual agreements that affect workers and how work is performed

Equipment, Materials, Knowledge, and Other Resources

- Budget sufficient to support the lean initiative's implementation
- The *Lean Champion Resource Guide* (Vitalo, Bujak, Vitalo, Patricia, and Ruffino, 2023).

Reporting Relationship

The lean champion reports to the sponsor of the lean initiative. In a full-adoption lean initiative, the sponsor must be the owner of the business or, in a publicly held company, its chief executive officer. Reporting occurs at least weekly and addresses, at a minimum, the following topics:

- The progress and achievements of the lean initiative
- The initiative's current focus and how it is being addressed
- Any newly discovered barriers to or accelerators of lean's success and how these barriers will be eliminated and accelerators leveraged
- Update on the state of stakeholder support for the lean initiative
- Feedback on the sponsor's performance of the sponsor role
- Recommendations for new ways the sponsor should promote and support lean's implementation
- Any issue related to the resourcing needed to sustain forward motion

Coordination

The lean champion must continuously coordinate his or her efforts with all business stakeholders. This coordination includes involving them fully in the transformation process's decision making and keeping them fully informed about its status, progress, and achievements.

Performance Standards

Below is a list of possible anchors of success criteria for evaluating the performance of the lean champion role. Use the guidance on *Write Performance Standards*, pages 430–431, and *Building a Success Criterion*, pages 460–466, to construct a standard for each anchor you elect to use.

A. Educate self and others about lean enterprise.

Possible Anchors

- The percentage of times the lean initiative's sponsor responds correctly to audience questions about the lean approach to commerce

- The percentage of all employees who have completed the lean approach to commerce introductory seminar
- The percentage of all other stakeholders who have completed the lean approach to commerce introductory seminar
- Average improvement in knowledge of the lean approach to commerce as reported by participants completing the *Lean Education Evaluation Form* (attached) after finishing the lean approach to commerce introductory seminar

B. Focus and conceive the lean transformation.

Possible Anchors

- A qualified business has been selected for the adoption of the lean approach to commerce.

Tip: Apply the following rule to test whether a qualified business has been selected for the adoption of the lean approach to commerce.

Suggested metric:

IF the target entity is a whole business as defined in this book
and its ownership is committed to transforming the business into a lean enterprise
and the markets within which the business does commerce are free enough for a business to compete based on the excellence of its offering and buying–benefiting experience
THEN the selected business is qualified.

- The business’s ownership is committed to transforming the business into a lean enterprise.

Tip: Apply the following rule to test whether the business’s owner(s) are committed to sponsoring the lean transformation.

IF the sponsor has been educated on the lean approach to commerce
and has completed a detailed review of Exhibit 5 (pages 39–52) that yielded a list of the major challenges the sponsor will need to face to realize success
and the sponsor proclaims his or her intent to adopt the lean approach to commerce
THEN judge the sponsor as committed to transforming the business into a lean enterprise.

- The lean transformation is judged feasible based on the application of the guidance provided in the section *Assess Candidates for Lean Transformation*, pages 173–181.

Appendix A

- A completed lean transformation action plan for the lean transformation conforming to the standard described in *Developing an Action Plan*, pages 393–395, exists.
- The completed lean transformation action plan passes the test for the sequencing of steps in its Process section as judged by the logic presented in *Testing the Completeness and Sequence of Steps in a Plan*, page 396.
- A Gantt chart depicting the tasks, schedule, and assignments of each action in the Process section of the lean transformation action plan that is formulated in conformance with the standard described in *Producing a Gantt Chart*, page 396, exists.
- The lean transformation action plan and Gantt chart have been approved by the lean initiative’s sponsor.
- The lean transformation action plan and Gantt chart have been shared across the business.

C. Involve all stakeholders in supporting the lean initiative.

Possible Anchors

- A list of stakeholders to the initiative with at least one entry for each of the seven types of possible stakeholders exists (see *Step 2.2 Identify Stakeholders* in the chapter *Task 2 Involve Stakeholders*).
- The list of stakeholders to the initiative has been verified by the sponsor and members of every business function as inclusive of all known stakeholders.
- A stakeholder profile has been completed for each stakeholder in conformance with the standard described in *Step 2.3 Understand Stakeholders* in the chapter *Task 2 Involve Stakeholders*.
- The percentage of ratings ≥ 4 by stakeholders responding to the *Lean Champion Stakeholder Feedback Survey* (attached).
- The response rate to the *Lean Champion Stakeholder Feedback Survey* is $\geq 70\%$.
- The percentage of stakeholders rated ≥ 3 by the lean implementation team on the *Adoption of Lean Thinking Scale* (attached).

D. Build, lead, and support the lean initiative’s implementation teams.

Possible Anchors

- A lean core team has been established.
- A core lean team charter has been created in conformance with the standard described in *Creating a Team Charter*, page 264.
- The percentage of core lean team members who satisfy all their role-defined performance standards.

- A lean transformation steering team has been established.
- A lean transformation steering team charter has been created in conformance with the standard described in *Creating a Team Charter* in the chapter *Task 4 Lead Meetings*.
- The percentage of ratings ≥ 4 by lean transformation team members on each of the four dimensions rated in the Meeting Power Scale contained in *Conducting the Meeting Power Scale Assessment*, page 290.
- The percentage of the lean transformation steering team's success criteria accomplished at the target level specified.

E. Steward the adoption of the lean approach to commerce.

Possible Anchors

- The sponsor's score on the *Adoption of Lean Thinking Scale* (attached) as measured by ratings submitted by a representative sample of employees selected from all job levels (executives, managers, supervisors, and nonmanagement) and other stakeholders.
- The percentage of lean transformation action plan milestones accomplished on schedule.
- The percentage of lean transformation success criteria as defined in the lean initiative action plan that are judged to meet or exceed their success targets.
- The percentage of lean transformation success criteria not yet at target level that demonstrate positive change from their prior evaluation to their current evaluation.

F. Measure the results of the lean transformation and use them to achieve success.

Possible Anchors

- The percentage of anchors identified in the lean transformation action plan's Success Criteria section for which a complete success criterion statement, consistent with the standard described in *Building a Success Criterion*, pages 460–466, is created.
- The percentage of interim output anchors identified in *Appendix A* for which a complete success criterion statement, consistent with the standard described in *Building a Success Criterion*, pages 460–466, is created.
- The percentage of final output anchors identified in *Appendix A* for which a complete success criterion statement, consistent with the standard described in *Building a Success Criterion*, pages 460–466, is created.

Appendix A

- The percentage of all success criterion measurements executed on time.
- The percentage of times a learning-from-performance exercise using the SRLD process, pages 509–513, was conducted following each measurement cycle on all measurement results.

G. Support the sponsor in sharing information about the initiative’s progress and results.

Possible Anchors

- The percentage of weekly updates completed and published to all employees as described in *Completing a Weekly Update*, pages 526–529.

H. Perfect your performance of the lean champion role.

Possible Anchors

- The percentage of lean champion role success criteria targets achieved.
- The percentage of times a learning-from-performance exercise using the SRLD process, pages 509–513, was conducted following each lean champion role performance review.
- The percentage of performance standards not yet at target level that demonstrate positive change from their prior evaluation to their current evaluation.

Attachments

- *Lean Education Evaluation Form*
- *Lean Champion’s Stakeholder Feedback Survey*
- *Adoption of Lean Thinking Scale*

Lean Education Evaluation Form

Name (Optional): _____ Date: _____

1. For each statement, indicate how knowledgeable you were *before* participating in this training session and how knowledgeable you are *now*. Assign a rating of 0 to 9 using the scale below. Write your answers in the boxes provided.

0	1 2 3	4 5 6	7 8 9
No knowledge	Little knowledge	Moderate knowledge	High knowledge

Statement	Before Event	After Event
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Rate your mastery of the following topics:

1. How businesses typically apply lean thinking		
2. What a full-adoption lean initiative means		
3. The goal that the lean approach to commerce seeks to realize		
4. The method by which it accomplishes its goal		
5. Who the lean approach to commerce serves		
6. The benefits customers gain from the lean approach to commerce		
7. The benefits employees gain from the lean approach to commerce		
8. The benefits suppliers gain from the lean approach to commerce		
9. The benefits owners gain from the lean approach to commerce		
10. The benefits the communities within which the lean enterprise operates and their governments gain from the lean approach to commerce		
11. Why it is important to business success that all stakeholders benefit from the lean approach to commerce		
12. How a lean enterprise judges its success		
13. How a lean enterprise is structured		
14. What waste is and how to detect it		
15. What value is and how to detect it		
16. What standardized work is and why it is important		
17. What striving for perfection is and who does it		
18. The role every employee (executives, managers, supervisors, and non-management employees) must fulfill		
19. How problem solving and decision making are done in a lean enterprise		
20. How employees are viewed in a lean enterprise versus a traditionally run business		

Lean Education Evaluation Form

2. Overall, how satisfied are you with this training event? Circle the number that best shows your reaction.

0	1 2 3	4 5 6	7 8 9
Dissatisfied	Slightly satisfied	Moderately satisfied	Highly satisfied

3. Provide your assessment of the training leader(s). Read each of the statements below and circle the number that represents how much you agree or disagree with it.

Statement	Strongly Disagree	Disagree	Agree & Disagree	Agree	Strongly Agree	Don't Know
a. The trainer(s) made it clear what was to be done and why.	1	2	3	4	5	DK
b. The trainer(s) were well organized.	1	2	3	4	5	DK
c. The trainer(s) made adequate use of practice as a way to prepare you to use the skills.	1	2	3	4	5	DK
d. The trainer(s) included an opportunity to ask questions about the tasks the class was asked to perform.	1	2	3	4	5	DK
e. The trainer(s) included opportunities to discuss what was being done and to elicit the participants' issues and concerns.	1	2	3	4	5	DK
f. The trainer(s) displayed energy throughout the course.	1	2	3	4	5	DK
g. The trainer(s) displayed an understanding of participant issues and concerns.	1	2	3	4	5	DK
h. The trainer(s) displayed a respectful attitude throughout the event.	1	2	3	4	5	DK

4. What were the strengths of the training?

5. What could be done to improve the training?

Lean Champion's Stakeholder Feedback Survey

Feedback From: _____

Date: _____

Please respond to each question below by circling the number under the term that best reflects your experience.

	Not At All	Somewhat	Moderately	Mostly	Completely
1. Are you getting the information you want or need about the lean initiative?	1	2	3	4	5
2. Are your expectations and concerns about the lean initiative being addressed?	1	2	3	4	5
3. Have the lean initiative activities related to your area of responsibility been properly coordinated with you?	1	2	3	4	5
4. Overall, how satisfied are you with your relationship with the lean initiative?	1	2	3	4	5

Please tell us your ideas for making the lean initiative coordination more successful.

A. What should we *Start Doing*? (Use other side of page, if needed.)

B. What should we *Stop Doing*? (Use other side of page, if needed.)

Lean Champion's Stakeholder Feedback Survey

C. What should we *Keep Doing*? (Use other side of page, if needed.)

Adoption of Lean Thinking Scale

Level	Description
5	Leader Person has mastered the content of lean enterprise as it relates to their work. Teaches others about lean ideas and tools. Creates for others opportunities to apply lean ideas. Facilitates and drives the lean enterprise initiative to success at his or her site by providing focus, leadership, and education. Helps individuals and teams apply lean ideas to better business success. Owns responsibility for advancing the adoption of the lean approach to commerce.
4	Contributor Person understands the basic concepts of lean enterprise and has mastered one or more lean tools. Person initiates involvement in lean activities. Generates ideas on own to contribute to lean efforts. Seeks out additional knowledge about lean tools. Takes ideas he or she receives about lean and shapes them to fit the work setting. Finds ways to apply ideas on his or her own.
3	Participant Person understands the basic concepts of lean enterprise. Attends and engages in activities spontaneously. Does what is asked without prompting or reminding. Produces useful results. May help the lean effort by freeing others to participate in lean activities.
2	Observer Person understands what lean enterprise means and attends activities when requested. Makes no effort to participate in activities spontaneously. Will perform activities if requested to do so but requires prompting or reminding to get them done, and what is produced is sometimes not helpful.
1	Detractor Person shows no understanding of what lean enterprise is and refuses to participate in lean activities. May actively discourage participation in lean enterprise activities by others.

