

PROJECT OVERVIEW:
 LEAN PROCESS IMPROVEMENT SCOPING DOCUMENT – Preparation Guidelines
 Version July 2012
 Audience: LEAN Team Lead

PROJECT NAME:	Include an Action Verb (What we want to do) + Noun (What do we want to impact or improve?)	
DATE SUBMITTED:		
OPPORTUNITY STATEMENT: (Why is this important to the organization)	<ul style="list-style-type: none"> • What is occurring, what is happening, what “pain” are we or our customers experiencing? What is wrong or not working? • When did this problem start? How long has it been going on? • Where does it occur? • How much, or what is the extent or magnitude of the problem? 	
TARGETED OUTCOMES:	<ul style="list-style-type: none"> • What are the specific outcomes we expect? “Reduce number of days by 50%” • What metrics will this project impact? 	
STAKEHOLDERS AND RESOURCES:	Names and Roles	
Process Owner	The person who is accountable for the success (results) of the project.	
LEAN Facilitator	The person that applies the LEAN approach and guides the event	
LEAN Team Lead:	The day-to-day leader of the effort (solution)	
Core Team Members:	Try to keep team to 6 team members. Make sure all process steps are represented by people who do the work.	
Extended Team Members	SMEs or stakeholders who provide expertise, data or insight	
Coach/Mentor	Experienced LEAN consultant who will coach and mentor the facilitator	
CUSTOMER GROUPS: (Notes key segments here)	Who are the customers of this project? Who will be impacted by the project?	
PROJECT METRIC(S): (Typical metrics include impact on quality, speed, and cost)		
SCOPE LIMITATIONS: (Where are the boundaries?)	<u>In Scope</u>	<u>Out of Scope</u>
	<ul style="list-style-type: none"> • Start and End steps in the process. • Which divisions are included? 	What is not included?
WORKPLAN STEPS:	<u>Timelines and Activities</u>	
Scoping Document	When will the scoping document be completed and approved?	
Establish baseline metrics / data gathering	Work with facilitator and gather relevant baseline data/process information	
Conduct Event		
Execute Improvements	4-8 weeks	
Sustainment	Schedule 30, 90 day follow-ups with LEAN facilitator and team members	