Health Evaluation for Lean Projects

Initiating Phase

Project Management Questions:

□ Yes / □ No   Do the sponsor and the project manager agree to the charter document??

□ Yes / □ No   Does the charter include a scope statement? Is it clear what's in (and not in) the project scope?

□ Yes / □ No   Can you measure the project completion acceptance criteria?

□ Yes / □ No   Is it clear who the project manager and the sponsor are?

□ Yes / □ No   Has the project manager been granted the authority necessary to execute the project?

Lean Questions:

□ Yes / □ No   Has the voice of the customer (VOC) been formally documented?

□ Yes / □ No   Have Gemba walks taken place to observe the cultural climate, existing problems and more?

□ Yes / □ No   Is it clear what standard work exists and how it can be leveraged?

□ Yes / □ No   Is it clear what current state value stream maps already exist?

Planning Phase

Project Management Questions:

□ Yes / □ No   Was there a team kickoff and were the project deliverables reviewed?

□ Yes / □ No   Does a detailed schedule exist?

□ Yes / □ No   Does the schedule highlight major milestones?

□ Yes / □ No   Did subject matter experts provide input on the schedule?

□ Yes / □ No   Has the schedule been communicated to all stakeholders?

□ Yes / □ No   Has a stakeholder assessment been completed?

□ Yes / □ No   Do you know what each key stakeholder expects?

□ Yes / □ No   Have you assessed the organization's willingness to accept project related changes?

□ Yes / □ No   Have you adjusted your stakeholder management plan to account for resistance to change?

□ Yes / □ No   Have you documented a communication and shared it?

□ Yes / □ No   Is there a system in place to measure and track progress?

□ Yes / □ No   Has a cost estimate been documented?

□ Yes / □ No   Has a scope change control process been documented?

□ Yes / □ No   Have the key risks been identified and prioritized?

□ Yes / □ No   Has a risk response plan been documented?

□ Yes / □ No   Was the team involved in the risk assessment?

□ Yes / □ No   Are the sponsor and stakeholders aware of the high-level risks and responses?

□ Yes / □ No   Is it clear what resources are needed to complete the project?

□ Yes / □ No   Have the necessary resources been committed to the project?

□ Yes / □ No   Have all the team member's roles and responsibilities been clearly defined and communicated?

□ Yes / □ No   Have all SOW's and contracts been reviewed and approved?

Lean Questions:

□ Yes / □ No   Have you practices Nemawashi to obtain consensus/agreement on the charter or other areas of importance?

□ Yes / □ No   Has an obeya room been reserved for the project?

□ Yes / □ No   Do current state value stream maps highlight problem areas?

□ Yes / □ No   Have you documented the root causes for all the highlighted problems?

□ Yes / □ No   Have you created A3 documents to help determine the root causes of problems?

□ Yes / □ No   Did you ask the Five Whys to help determine all the root causes?

□ Yes / □ No   Have you created future state value stream maps?

□ Yes / □ No   Has the team conducted kaizen and kaikaku events to address problem areas?

□ Yes / □ No   Is the team aware of (and on guard for) the eight forms of waste?

□ Yes / □ No   Is the team planning poka-yoke into processes, procedures and products to avoid mistakes?

Executing, Monitoring and Controlling Phases

Project Management Questions:

□ Yes / □ No   Are all scope change requests documented and assessed for project impacts?

□ Yes / □ No   Are only approved scope changes implemented?

□ Yes / □ No   Are the actual expenses tracked against the baseline cost estimate?

□ Yes / □ No   Are the actual completion dates tracked against the planned schedule?

□ Yes / □ No   Are issues documented in an issue log?

□ Yes / □ No   Does the project team have access to the Issue Log?

□ Yes / □ No   Is it clear who is assigned to address specific issues?

□ Yes / □ No   Are there consistent team meetings?

□ Yes / □ No   Is the team communicating about and acting on any new risks?

□ Yes / □ No   Have the team members been given feedback on their performance?

□ Yes / □ No   Are progress updates regularly communicated to the sponsor and stakeholders?

Lean Questions:

□ Yes / □ No   Are team Huddle meetings taking place on a regular basis?

□ Yes / □ No   Is the team delivering only what the customer values, letting the customer pull what is expected?

□ Yes / □ No   Are visual displays and metrics available in the obeya room and a shared stakeholder site for all stakeholders to observe?

□ Yes / □ No   Is the team following-up on the actions arising from kaizen events and kaikaku events?

□ Yes / □ No   Is the team meeting the objectives of the Future State Value Stream Map?

□ Yes / □ No   Is the team focused on continuously improving processes, procedures, etc.?

Closing Phase

Project Management Questions:

□ Yes / □ No   Has the project sponsor and/or customer approved the final deliverables?

□ Yes / □ No   Have all the contracts and purchase orders been closed?

□ Yes / □ No   Have all the stakeholders been notified that all work has been successfully completed?

□ Yes / □ No   Have the team members been released to work on other projects?

Lean Questions:

□ Yes / □ No   Has the team conducted both a quality check and a final review for defects?

□ Yes / □ No   Have you conducted Nemawashi and obtained a formal consensus/approval of the deliverables?

□ Yes / □ No   Is there a handing-off plan for continuously improving and aligning the final product with the customer's expectations?

□ Yes / □ No   Has yokoten been applied to rapidly share the Lessons Learned from the project where needed?

□ Yes / □ No   Is there a communication plan to report that the Future State Value Stream Map is now in place?