

PRACTICAL PACK · FIELD TESTED

Lean Toolkit Bundle

The everyday templates and tools to run a Lean project — Lean Operations disciplines and Flow & Efficiency analysis — each with a completed example and a blank version ready for your own project.

BUILT FOR

Lean practitioners, operations leaders, team leaders, CI coaches and frontline improvement teams.

YOU WILL LEAVE WITH

A complete, field-tested Lean toolkit so every team at your site uses the same standard tools day to day.

WHAT'S INSIDE

- | | | |
|----|------------------------------|---|
| 01 | LEAN FUNDAMENTALS | Short history and the five guiding principles |
| 02 | LEAN OPERATIONS | Daily Lean disciplines that keep waste out |
| 03 | FLOW & EFFICIENCY | Measure and design flow that doesn't stop |
| 04 | VISUAL REFERENCE | 5S, 8 wastes, VSM, kanban, PDCA at a glance |

WHAT'S INSIDE

Contents

The bundle opens with a short Lean primer, then takes each template section in turn — a description, why we use it, the benefits it brings, a completed example to learn from, and a blank version for you to use. It closes with a one-page visual reference for the core Lean tools.

01**LEAN FUNDAMENTALS**

A short history of Lean and the five guiding principles

2 pages

02**LEAN OPERATIONS**

Run the daily Lean disciplines that keep waste out

10 templates

03**FLOW & EFFICIENCY**

Measure and design flow so work moves without waiting

9 templates

04**VISUAL REFERENCE**

5S, 8 wastes, standard work, process map, VSM, kanban, PDCA

8 pages

INTRODUCTION

How to use this guide

Lean is the discipline of removing waste so work flows smoothly from start to finish. This bundle splits the most common templates into two practical groups: Lean Operations (the daily disciplines that keep waste out) and Flow & Efficiency (the tools that measure and design how work moves).

For every template you will see three things in sequence:

1**What it is & why we use it**

A short explanation of the template's purpose and the benefits it brings.

2**A completed example**

A realistic worked example so you can see how the template should look when filled in well.

3**A blank version**

The same template with the fields empty, ready for you to use on your own project.

THE TWO SECTIONS

LEAN OPERATIONS

Lean Operations is the daily rhythm of running a Lean workplace — seeing waste, standardising the right way to work, and using simple visual and management tools to keep performance on track. These templates support the everyday routines (5S, gemba walks, standard work, kaizen events, daily management) that turn Lean from a project into a habit.

FLOW & EFFICIENCY

Flow & Efficiency tools quantify how work actually moves through your process — cycle time, takt time, lead time, throughput, capacity and bottlenecks. They expose where work is waiting, where it is overloaded, and where it can be balanced. This is the analytical side of Lean: making the flow problem visible before you redesign it.

FUNDAMENTALS · 01

A short history of Lean

Lean is the distillation of more than a century of operations thinking. It grew from the Ford assembly line, was refined into the Toyota Production System by Taiichi Ohno after the Second World War, then formalised for the wider world by MIT researchers in the early 1990s. Today its principles are applied wherever work flows — manufacturing, healthcare, software, services and government.

KEY MILESTONES

1913

Ford's moving assembly line

Henry Ford launches the moving assembly line at Highland Park, mass-producing the Model T at a pace nobody had thought possible.

1948

Toyota Production System

Taiichi Ohno develops TPS at Toyota — single-piece flow, just-in-time, jidoka (build in quality). The DNA of modern Lean.

1988

The word 'Lean' is coined

MIT researcher John Krafcik publishes 'Triumph of the Lean Production System', giving the philosophy a name.

1990

The Machine That Changed The World

Womack, Jones and Roos publish the landmark study of TPS, introducing Lean to Western industry at scale.

1996

Lean Thinking

Womack and Jones define the five principles — Value, Value Stream, Flow, Pull, Perfection — that still guide Lean today.

2000s →

Lean beyond the factory

Lean spreads into healthcare, banking, software (Lean Startup), public services and knowledge work — the same principles, new contexts.

FUNDAMENTALS · 02

The five principles of Lean

Womack and Jones distilled Lean into five principles that work in sequence — define value, see how it flows today, make it flow without interruption, let the customer pull it, then pursue perfection. Every template in this bundle supports one or more of these principles.

1**VALUE****Define value from the customer's perspective**

What is the customer actually willing to pay for? Anything else is, by definition, waste. Value is decided by the customer — not by the people doing the work.

2**VALUE STREAM****Map every step that delivers value**

Identify every step required to deliver value, end to end. Expose the steps that add value, the ones that don't but are necessary, and the ones that are pure waste.

3**FLOW****Make value-creating steps flow without interruption**

Reorganise work so it moves without stops, queues, batches or rework. Smooth, continuous flow is faster and cheaper than fast individual steps with waiting in between.

4**PULL****Let the customer pull value through the process**

Produce only what the next customer needs, when they need it. Pull replaces guesswork with signals, and overproduction with responsiveness.

5**PERFECTION****Pursue perfection through continuous improvement**

Treat improvement as ongoing, not a project. Every cycle through the first four principles should expose new waste — and remove it.

SECTION 01 OF 02

LEAN OPERATIONS

Run the daily Lean disciplines that keep waste out

Lean Operations is the daily rhythm of running a Lean workplace — seeing waste, standardising the right way to work, and using simple visual and management tools to keep performance on track. These templates support the everyday routines (5S, gemba walks, standard work, kaizen events, daily management) that turn Lean from a project into a habit.

TEMPLATES IN THIS SECTION

10 templates

The pages that follow take each lean operations template in turn. Read the description, the rationale and the benefits; study the completed example; then use the blank version to apply it to your own work.

TEMPLATE 01 OF 10 · LEAN OPERATIONS

5S AUDIT SHEET

WHAT IT IS

A 5S Audit Sheet provides a structured assessment of workplace organisation against all five S's: Sort (remove unnecessary items), Set in Order (organise remaining items), Shine (clean and maintain), Standardise (establish standards), and Sustain (ensure standards are maintained over time). Score each criterion from 1 (very poor) to 5 (excellent) and record findings and actions.

WHY WE USE IT

A 5S Audit Sheet scores a work area against the five 5S disciplines — Sort, Set in Order, Shine, Standardise, Sustain. It turns 'looks tidy' into a defensible, repeatable measure of workplace organisation.

BENEFITS

- Makes workplace organisation a measurable, trackable metric
- Surfaces drift early before it becomes disorganisation
- Gives team leaders a structured coaching conversation

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

5S AUDIT SHEET

Score each 5S criterion from 1... 5S AUDIT SHEET

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

SORT

5S Category	Audit Criterion	Score (1-5)	Observations / Evidence	Action Required	Owner	Due Date
Sort	Open complaint queue is free of...	2	Resolved cases remaining in open...	Set CRM auto-close rule for resolved...	IT Lead	28 Apr 2026
Sort	Agent system tabs and bookmarks...	3	Agents have 8+ browser tabs...	Create standardised browser...	CS Team Lead	07 Apr 2026

SET IN ORDER

5S Category	Audit Criterion	Score (1-5)	Observations / Evidence	Action Required	Owner	Due Date
Set in Order	Complaint templates and scripts...	2	Scripts stored in 3 different folders...	Consolidate all scripts to one CS...	CS Team Lead	07 Apr 2026
Set in Order	Authority levels and escalation...	2	Authority guide exists but not...	Add authority guide shortcut to...	IT Lead	01 May 2026
Set in Order	Investigation checklist is the first...	4	Checklist embedded after rollout —...	Coach non-compliant agents; brief...	CS Team Lead	14 Apr 2026

SHINE

5S Category	Audit Criterion	Score (1-5)	Observations / Evidence	Action Required	Owner	Due Date
Shine	CRM complaint inbox/queue reviewed...	3	Daily clear-down inconsistent —...	Add daily clear-down to agent...	CS Team Lead	07 Apr 2026
Shine	Agent workstations and screens...	4	Generally good — most agents have clean...	Remove paper notes — all...	CS Team Lead	07 Apr 2026

STANDARDISE

5S Category	Audit Criterion	Score (1-5)	Observations / Evidence	Action Required	Owner	Due Date
Standardise	Standard process map is accessible...	2	No standard process map visible...	Print and display process map in team...	James Carter	01 Apr 2026
Standardise	KPI dashboard is visible to...	2	Dashboard shared monthly by...	Set up live KPI screen in team area;...	IT Lead	01 May 2026
Standardise	All agents are following the...	4	97% compliance post-rollout.	Share best-practice completed...	CS Team Lead	14 Apr 2026

SUSTAIN

5S Category	Audit Criterion	Score (1-5)	Observations / Evidence	Action Required	Owner	Due Date
Sustain	5S standards are reviewed and audited...	1	No formal 5S audit existed before...	Schedule monthly 5S audit — add to...	CS Team Lead	01 May 2026
Sustain	Team members are trained on...	3	Training completed for investigation...	Extend annual training plan to...	L&D Lead	01 Jul 2026

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5S AUDIT SHEET

5S AUDIT SHEET

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

SORT

5S Category	Audit Criterion	Action Required	Owner	Due Date
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5S Category	Audit Criterion	Action Required	Owner	Due Date
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SHINE

5S Category	Audit Criterion	Action Required	Owner	Due Date
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STANDARDISE

5S Category	Audit Criterion	Action Required	Owner	Due Date
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SUSTAIN

5S Category	Audit Criterion	Action Required	Owner	Due Date
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TEMPLATE 02 OF 10 · LEAN OPERATIONS

8 WASTES ASSESSMENT

WHAT IT IS

The 8 Wastes Assessment provides a structured review of all 8 Lean waste types (TIMWOODS): Transportation, Inventory, Motion, Waiting, Overproduction, Overprocessing, Defects and Skills. For each waste, score its severity from 1 (minimal) to 10 (very significant), document a real example from the process, the root cause, impact, recommended action, owner and priority.

WHY WE USE IT

An 8 Wastes Assessment walks a process and rates the presence of each of the eight Lean wastes — Defects, Overproduction, Waiting, Non-utilised talent, Transport, Inventory, Motion, Excess processing. It converts a generic 'reduce waste' instruction into specific, prioritised targets.

BENEFITS

- Translates the eight wastes from theory into observed evidence
- Prioritises which wastes are actually hurting your process
- Produces a baseline you can re-score after improvement

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

8 WASTES ASSESSMENT

Score each of the 8 Lean wastes... 8 WASTES ASSESSMENT

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS 8 WASTES ASSESSMENT?

The 8 Wastes Assessment provides a...

8 WASTES ASSESSMENT REGISTER

Score each waste 1 (minimal) to 10

Waste	Definition	Example in This Process	Severity (1-10)	Impact	Root Cause	Recommended Action	Owner	Priority
Transportation	Any unnecessary movement of information	Manual transfer of complaint data...	8	High	Two separate systems — email and CRM —...	CRM-email integration project —...	IT Lead	1 - Critical
Inventory	Work	42 complaints aged >48 hours...	8	High	Investigation time too long (avg...)	Investigation checklist to reduce...	James Carter	1 - Critical
Motion	Unnecessary movement of people	Agents switching between CRM	7	Medium	No single-screen view; resolution...	Single CRM process view; authority guide...	IT Lead	2 - High
Waiting	Idle time when a person	Customers waiting average 6.2h for...	9	High	No SLA alert for acknowledgement; unclear...	CRM SLA alert at 4h; authority levels...	CS Team Lead	1 - Critical
Overproduction	Doing more than what is needed	Complaint details entered separately in...	5	Medium	Two separate systems requiring duplicate...	Single-system entry; SOP specifying...	IT Lead	3 - Medium
Overprocessing	Doing more work	Low-value complaints (billing...	6	Medium	No tiered resolution authority —...	Authority levels guide — tier-based...	CS Team Lead	2 - High
Defects	Errors	38% repeat contact rate —...	9	High	No structured investigation...	Investigation checklist +...	James Carter	1 - Critical
Skills (unused talent)	Underutilising or not recognising...	Experienced CS agents not sharing...	4	Low	No mechanism for sharing best...	Monthly peer review sessions; standard...	CS Team Lead	4 - Low

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8 WASTES ASSESSMENT

8 WASTES ASSESSMENT

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

8 WASTES ASSESSMENT REGISTER

Waste	Definition	Severity (1-10)	Impact	Root Cause	Recommended Action	Owner	Priority
Transportation		0					
Inventory		0					
Motion		0					
Waiting		0					
Overproduction		0					
Overprocessing		0					
Defects		0					
		0					

TEMPLATE 03 OF 10 · LEAN OPERATIONS

CONTINUOUS IMPROVEMENT LOG

WHAT IT IS

A Continuous Improvement Log captures improvement ideas from across the team — from first suggestion through to implementation. For each idea, record the date raised, category, description, who raised it, estimated benefit, current status (Idea/Under Review/Approved/In Progress/Complete/Rejected), owner, target date and outcome. Review regularly to ensure ideas are progressed.

WHY WE USE IT

A Continuous Improvement Log captures every improvement idea, who owns it, its status and the result. It prevents good ideas being raised, forgotten and never tried.

BENEFITS

- Ensures no improvement idea is lost between meetings
- Makes the improvement pipeline visible to leaders
- Builds an audit trail of value delivered over time

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

CONTINUOUS IMPROVEMENT LOG

Log every improvement idea CI LOG

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS CI LOG?

A Continuous Improvement Log captures...

IMPROVEMENT IDEA REGISTER

Complete one row per improvement idea

ID	Date	Category	Description	Raised By	Estimated Benefit	Status	Owner	Target	Outcome / Notes
CI-001	01 Feb 2026	Technology	Build CRM direct-to-case routing —...	CS Agent	~41h saved per month across team	Approved	IT Lead	01 Jun 2026	In IT development sprint — requirements...
CI-002	15 Feb 2026	Process	Create a dedicated complaint knowledge...	CS Agent	~1h per agent per week saved on...	Complete	CS Team Lead	25 Mar 2026	Deployed as part of refresher training...
CI-003	01 Mar 2026	Measurement	Automate weekly performance...	CS Team Lead	~3h per week saved on manual data compilation	In Progress	IT Lead	30 Apr 2026	IT sprint scheduled for week...
CI-004	10 Mar 2026	People	Introduce monthly peer review sessions...	CS Team Lead	Reduce investigation time variability;...	Approved	CS Team Lead	01 May 2026	Structure agreed — first session...
CI-005	15 Mar 2026	Process	Create standardised email...	CS Agent	~0.5h per case for acknowledgement wording	Complete	CS Team Lead	25 Mar 2026	5 templates created and deployed — available in...
CI-006	25 Mar 2026	Technology	Set CRM auto-close rule for resolved cases that...	IT Lead	Reduce queue clutter; improve case data integrity	Under Review	IT Lead	01 May 2026	IT feasibility assessment in progress
CI-007	01 Apr 2026	Process	Introduce weekly 5-minute team briefing...	CS Team Lead	Improve FCR rate over time as team...	Idea	CS Team Lead	—	Proposed at team meeting — to be evaluated
CI-008	05 Apr 2026	Measurement	Set up real-time CSAT dashboard visible to all...	James Carter	Improve agent awareness of customer impact;...	Idea	IT Lead	01 Jun 2026	Pending IT capacity review

For downloadable templates go to <https://www.simplicityhub.co.uk/templates.html>

For simulated calculators go to <https://www.simplicityhub.co.uk/tools.html>

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CONTINUOUS IMPROVEMENT LOG

CI LOG

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

IMPROVEMENT IDEA REGISTER

ID

CI-001

CI-002

CI-003

CI-004

CI-005

CI-006

CI-007

CI-008

TEMPLATE 04 OF 10 · LEAN OPERATIONS

DAILY MANAGEMENT BOARD

WHAT IT IS

A Daily Management Board structures the daily team standup meeting, ensuring consistent review of Safety, Quality, Delivery, Cost and People (SQDCP) metrics. For each metric, record the target, actual performance and RAG status. Document issues raised and actions assigned. Set priorities for the day. Review open actions and update status.

WHY WE USE IT

A Daily Management Board is the visual hub for a team's daily huddle — performance vs target, issues, actions and recognition. It creates the cadence that keeps Lean alive day to day.

BENEFITS

- Makes performance and problems visible the moment they appear
- Drives a short, focused daily team conversation
- Creates a structured place for issues to be raised and owned

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

DAILY MANAGEMENT BOARD

Structure your daily team... DAILY MANAGEMENT BOARD

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

MEETING DETAILS

Meeting Date 07 Apr 2026

Facilitator CS Team Lead

Attendees All CS agents, James Carter

Today's Priorities:

1.

SQDCP — SAFETY, QUALITY, DELIVERY, COST, PEOPLE

Category	Metric	Target	Actual	RAG	Issue / Comment	Action	Owner
Safety	Incidents or near misses today	0	0	Green	—	—	—
Quality	Investigation checklist compliance	100%	97% (11/12)	Amber	1 agent not completing checklist — same...	Coaching session today at 14:00 —...	CS Team Lead
Quality	CSAT score (last available — monthly)	≥ 72%	69%	Amber	Improving trend.	Chase IT for CSAT trigger update — today	CS Team Lead
Delivery	Acknowledgement within 4h — yesterday	100%	88% (7/8 cases)	Red	6 cases breached 4h SLA last week —...	Review 6 breach cases — identify...	James Carter
Delivery	Average TTR — last 7 days	≤ 3.5 days	3.8 days	Amber	Approaching target — positive direction	Monitor — no action required today	CS Team Lead
Delivery	Cases open >48 hours in queue	0	3	Amber	3 cases approaching 48h —...	Agents to review and action queue now	CS Agent
Cost	Average handling time (AHT) —...	≤ 12 min	10.5 min	Green	Ahead of target	—	—
People	Attendance today	100% (12)	11/12	Amber	1 agent on planned leave today — TL to...	TL to review daily capacity —...	CS Team Lead

OPEN ACTIONS

Action	Owner	Due Date	Status
Review 6 SLA acknowledgement...	James Carter	Today 12:00	Open
Coaching session — investigation...	CS Team Lead	Today 14:00	Open
Chase IT for CSAT survey trigger...	CS Team Lead	Today	Open
All agents: clear queue of cases...	CS Agent	This morning	Open
IT: CSAT survey trigger deployment	IT Lead	28 Apr 2026	In Progress

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DAILY MANAGEMENT BOARD

DAILY MANAGEMENT BOARD

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

MEETING DETAILS

Meeting Date

Facilitator

Attendees

SQDCP — SAFETY, QUALITY, DELIVERY, COST, PEOPLE

Category	Metric	Target	Actual	RAG	Issue /	Action	Owner
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OPEN ACTIONS

Action	Owner	Due Date	Status
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TEMPLATE 05 OF 10 · LEAN OPERATIONS

GEMBA WALK CHECKLIST

WHAT IT IS

A Gemba Walk is a structured visit to where the work happens — to observe the process directly rather than relying on reports or assumptions. For each area and category, record what you observed, any good practice noted, concerns or issues identified, the follow-up action required and the owner. Always go with curiosity, not to find fault.

WHY WE USE IT

A Gemba Walk Checklist guides a leader walking the workplace — what to look for, what to ask, what to record. It turns a vague 'go and see' into a structured, repeatable practice.

BENEFITS

- Stops gemba walks becoming social visits with no output
- Standardises what good observation looks like across leaders
- Produces a tangible record of issues, actions and praise

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

GEMBA WALK CHECKLIST

Go to where the work happens. GEMBA WALK CHECKLIST

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

GEMBA DETAILS

Area / Process Observed Customer Service — Complaint Handling

Observer James Carter

Date 10 Jan 2026

Accompanying Team CS Team Lead, Data Analyst

OBSERVATIONS

Category	Observation	Good Practice Noted	Concern / Issue	Action Required	Owner
Safety	Working environment observed...	No physical safety concerns.	One agent using personal mobile device...	Remind team of data protection policy...	CS Team Lead
Quality	Observed 5 live complaint...	Agents genuinely engaged with...	No standard investigation approach —...	Design and introduce investigation...	James Carter
Quality	Root cause coding at case closure...	3/8 agents coding root cause correctly...	5/8 agents skipping or guessing...	Make root cause code mandatory...	IT Lead
Flow & Process	End-to-end complaint journey...	Acknowledgement sent promptly...	Manual transfer from email to CRM...	Scope CRM-email integration...	IT Lead
Flow & Process	Handoffs and escalations observed	Team lead available and responsive when...	Agents frequently escalating cases that...	Draft and publish authority levels and...	James Carter
Waste	Observed agent system usage during...	Agents generally quick to find CRM...	Average 7–9 system switches per...	Single-screen CRM view with...	IT Lead
Waste	Complaint queue reviewed and...	None — this is an entirely...	42 complaints in queue aged >48 hours —...	Investigation time reduction — checklist	James Carter
Visual Management	Team area reviewed for visual...	Team notice board present — used for...	No performance data visible.	Set up visual management board — KPIs	CS Team Lead
Visual Management	CRM and system interfaces reviewed...	CRM homepage reasonably clear —...	No links to authority guide	Add key links (authority guide, scripts	IT Lead
People & Engagement	Team interaction and mood observed...	High energy team — agents clearly...	Visible frustration when...	Surface frustrations in Kaizen...	James Carter

OVERALL SUMMARY AND RECOMMENDATIONS

The Gemba walk revealed significant...

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GEMBA WALK CHECKLIST

GEMBA WALK CHECKLIST

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

GEMBA DETAILS

Observer

Date

Accompanying Team

OBSERVATIONS

Category	Observation	Good Practice	Concern /	Action	Owner
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OVERALL SUMMARY AND RECOMMENDATIONS

TEMPLATE 06 OF 10 · LEAN OPERATIONS

KAIZEN EVENT PLANNER

WHAT IT IS

A Kaizen Event Planner helps teams prepare for a focused rapid improvement event (Kaizen). It defines the event name, dates, area, problem statement, current state, target state, day-by-day agenda, team members and expected outputs. A well-planned Kaizen event produces tangible improvements in 1–5 days that would take months through conventional change approaches.

WHY WE USE IT

A Kaizen Event Planner scopes a short, focused improvement event — objective, scope, team, schedule, deliverables. It prevents the most common kaizen failure: starting without a clear definition of done.

BENEFITS

- Forces a tight scope so the event finishes with a real result
- Aligns the team and sponsors before the event begins
- Sets the success criteria up front, removing later argument

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

KAIZEN EVENT PLANNER

Plan a structured rapid... KAIZEN EVENT PLANNER

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

EVENT DETAILS

Event Name Complaint Investigation Deep Dive Kaizen

Start Date 14 Jan 2026

End Date 15 Jan 2026

Area / Process Customer Service — Complaint Handling

Facilitator James Carter

Sponsor Sarah Mitchell

PROBLEM STATEMENT

Average complaint investigation time...

CURRENT STATE

Average TTR: 5.2 days.

TARGET STATE

Standard investigation checklist...

EVENT AGENDA

Day-by-day session plan

Day	Session	Activity / Focus	Facilitator	Expected Output
Day 1	Morning	Gemba observation — observe 5...	James Carter	Current state observation...
Day 1	Morning	Current state process map — build...	James Carter	Current state process map with...
Day 1	Afternoon	Root cause analysis — why is...	James Carter	Agreed root causes — visual...
Day 1	Afternoon	Future state design — agree what the...	James Carter	Future state process map
Day 2	Morning	Co-design investigation...	James Carter	Draft investigation checklist — v1
Day 2	Morning	Draft authority levels and escalation...	James Carter	Authority levels guide — first draft...
Day 2	Afternoon	Test investigation checklist on...	James Carter	Refined investigation checklist — v2.
Day 2	Afternoon	Build implementation plan — owners	James Carter	Kaizen Implementation plan — signed...

KAIZEN TEAM

Name	Role in Kaizen	Department
James Carter	Kaizen Facilitator / Project Lead	Process Improvement
Sarah Mitchell	Sponsor — sign-off authority	Customer Service Director
CS Team Lead	Team Leader — process knowledge	Customer Service
CS Agent (x2)	Front-line — co-design checklist	Customer Service
IT Lead	Systems — CRM changes scoped	IT
L&D Lead	Training design and delivery	Learning & Development

EXPECTED OUTPUTS FROM THE EVENT

1.

FOLLOW-UP ACTIONS AND DATES

Go-live: 01 Apr 2026.

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KAIZEN EVENT PLANNER

KAIZEN EVENT PLANNER

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

EVENT DETAILS

Event Name
 Start Date
 End Date
 Area / Process
 Facilitator
 Sponsor

PROBLEM STATEMENT

CURRENT STATE

TARGET STATE

EVENT AGENDA

Day	Session	Activity / Focus	Facilitator	Expected Output
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KAIZEN TEAM

Name	Role in Kaizen	Department
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EXPECTED OUTPUTS FROM THE EVENT

FOLLOW-UP ACTIONS AND DATES

TEMPLATE 07 OF 10 · LEAN OPERATIONS

PROCESS OBSERVATION SHEET

WHAT IT IS

A Process Observation Sheet is used to time each step of a process across multiple cycles and classify each step as Value Added (VA), Non-Value Added (NVA), or Necessary but Non-Value Added (NNVA). Timing multiple cycles reveals variability and identifies opportunities for standardisation. The VA ratio shows how much of the total cycle time is genuinely adding value.

WHY WE USE IT

A Process Observation Sheet captures what is actually happening at a workstation — each step, time taken, value-add classification, observations. It is the bridge between theory and reality.

BENEFITS

- Replaces assumptions about the process with first-hand evidence
- Quantifies value-add vs non-value-add time at task level
- Surfaces variation between operators that is invisible from a desk

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PROCESS OBSERVATION SHEET

Time each process step across multiple cycles, classify value add, calculate averages and identify waste. PROCESS OBSERVATION

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS PROCESS OBSERVATION?

A Process Observation Sheet is used to time each step of a process across multiple cycles and classify each step as Value Added (VA), Non-Value Added (NVA), or Necessary but Non-Value Added (NNVA). Timing multiple cycles reveals variability and identifies opportunities for standardisation. The VA ratio shows how much of the total cycle time is genuinely adding value.

OBSERVATION DETAILS

Process Name Customer Complaint Investigation and Closure

Area Customer Service Department

Observer James Carter

Date 10 Jan 2026

Cycles Observed 5

STEP TIMINGS

All times in minutes

Process Step	T1	T2	T3	T4	T5	Avg (min)	VA/NVA	Activity Type	Notes / Observations
Receive and log complaint	1.5	1.3	1.8	1.2	1.6	1.48	VA	Case intake	3 agents log in CRM; 2 agents log in email first then transfer. Inconsistent intake method.
Transfer from email to CRM	3.1	2.8	3.5	3.2	2.9	3.10	NVA	Transportation	Manual copy-paste between email and CRM. Duplicate entry. No direct submission path.

SUMMARY

Total Average Cycle Time 17.50 min

Value-Added (VA) Time 11.32 min (65%)

Non-Value-Added (NVA+NNVA) Time 6.18 min (35%)

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PROCESS OBSERVATION SHEET

PROCESS OBSERVATION

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

OBSERVATION DETAILS

Process Name

Area

Observer

Date

Cycles Observed 5

STEP TIMINGS

Process Step	T1	T2	T3	T4	T5	Avg (min)	VA/NVA	Activity Type	Notes / Observations
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TEMPLATE 08 OF 10 · LEAN OPERATIONS

STANDARD WORK TEMPLATE

WHAT IT IS

A Standard Work Template documents the best-known, most efficient method for performing a process. It defines each step in sequence, the time for each step, whether it is value-added (VA), non-value-added (NVA) or necessary but non-value-added (NNVA), the responsible operator, and any key quality points or safety checks. Standard work is the baseline for continuous improvement.

WHY WE USE IT

A Standard Work Template documents the current best-known way to do a task — the steps, the takt time, the cycle time, the key points. It is the foundation Lean works from.

BENEFITS

- Creates a single, agreed reference for how a task should be done
- Makes training faster and more consistent
- Becomes the baseline that improvement is measured against

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

STANDARD WORK TEMPLATE

Document the best-known method for... STANDARD WORK

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				
WHAT IS STANDARD WORK?	A Standard Work Template documents...				

PROCESS HEADER

Process Name Customer Complaint Investigation...

Area / Department Customer Service Department

Version 1.0

Date 01 Apr 2026

Prepared By James Carter

Approved By Sarah Mitchell

Cycle Time 10.5 min

Takt Time 12 min

WIP (max) Up to 3 complaints per agent...

Purpose To define the best-known method for...

STANDARD WORK STEPS

Complete one row per step in sequence

#	Action	Detail / Instructions	Time (min)	VA/NVA	Operator	Key Points / Quality Checks
1	Acknowledge the complaint	Send acknowledgement to...	1.5	VA	CS Agent	CRM SLA alert will trigger if not...
2	Open investigation checklist in CRM	Navigate to complaint...	0.5	NNVA	CS Agent	CRM will not allow case closure...
3	Gather and document the facts	Record: what happened, when	4.0	VA	CS Agent	Be specific — vague...
4	Identify root cause using checklist	Use checklist prompts to...	1.5	VA	CS Agent	If root cause unclear: escalate to TL...
5	Check authority level and...	Refer to authority levels guide.	0.5	NNVA	CS Agent / TL	Authority guide accessible from...
6	Apply resolution	Apply resolution within CRM.	0.5	VA	CS Agent / TL	Resolution applied in CRM — do not...
7	Communicate closure to customer	Use standard closure script.	1.5	VA	CS Agent	Do not close case before...
8	Code root cause and close in CRM	Select root cause code from...	0.5	NNVA	CS Agent	Root cause code is mandatory —...

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STANDARD WORK TEMPLATE

STANDARD WORK

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

PROCESS HEADER

Process Name

Area / Department

Version 1.0

Date

Prepared By

Approved By

Cycle Time

Takt Time

WIP (max)

Purpose

STANDARD WORK STEPS

#	Action	Time (min)	VA/NVA	Operator
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TEMPLATE 09 OF 10 · LEAN OPERATIONS

VISUAL MANAGEMENT BOARD

WHAT IT IS

A Visual Management Board provides a single, visual view of process performance — making it easy for the team to see at a glance how the process is performing against targets. Organise metrics under SQCDP sections: Safety, Quality, Delivery, Cost and People. For each metric, define the target, current performance, trend and RAG status (Green/Amber/Red).

WHY WE USE IT

A Visual Management Board makes the status of a process visible at a glance — targets, actuals, issues, standards. It moves information from systems and meetings out to the workspace.

BENEFITS

- Surfaces problems the moment they happen, not at month-end
- Aligns the whole team on what 'normal' and 'abnormal' look like
- Reduces the need for status meetings and email updates

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First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

VISUAL MANAGEMENT BOARD

Define what appears on each section... VISUAL MANAGEMENT BOARD

Project Title	Project Owner	Sponsor	Version	Date	Updated By	
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter	
BUSINESS AREA	Customer Service					
WHAT IS VISUAL MANAGEMENT BOARD?	A Visual Management Board...					
BOARD TILE REGISTER			Complete one row per metric or KPI			
Section	Metric / KPI	Target	Current	RAG	Owner	Notes
Safety	Incidents / near misses this week	0	0	Green	CS Team Lead	No incidents reported.
Safety	Outstanding safety actions	0	0	Green	CS Team Lead	All safety actions from last...
Quality	Average complaint response time (TTR)	≤ 3.5 days	3.8 days	Amber	James Carter	Improving from 5.2 days.
Quality	CSAT score	≥ 72%	69%	Amber	James Carter	Improving.
Quality	Investigation checklist compliance	100%	97%	Amber	CS Team Lead	1 agent gap — coaching scheduled.
Delivery	Complaints acknowledged within 4 hours	100%	94%	Amber	CS Team Lead	SLA alert active.
Delivery	First contact resolution (FCR) rate	≥ 65%	62%	Amber	CS Team Lead	Improving — authority levels...
Delivery	Repeat contact rate (30-day)	≤ 30%	34%	Amber	CS Team Lead	Positive trend.
Cost	Average handling time (AHT)...	≤ 12 min	10.5 min	Green	CS Team Lead	Ahead of target — checklist...
Cost	Escalation rate	≤ 8%	11%	Amber	CS Team Lead	Reducing — authority levels guide...
People	Agent training completion	100% (12/12)	12/12	Green	L&D Lead	100% — all agents signed off.
People	Agent wellbeing / morale check-in	4/5 (survey)	4.1/5	Green	CS Team Lead	Team positive about new process.
Actions / Issues	CSAT survey trigger fix	28 Apr 2026	In progress	Amber	IT Lead	IT sprint scheduled. Monitor weekly.
Actions / Issues	Agent coaching — checklist compliance	12 Apr 2026	Scheduled	Green	CS Team Lead	Session booked — confirm completion...

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VISUAL MANAGEMENT BOARD

VISUAL MANAGEMENT BOARD

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

BOARD TILE REGISTER

Section	Metric / KPI	Target	Current	RAG	Owner	Notes
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TEMPLATE 10 OF 10 · LEAN OPERATIONS

WASTE IDENTIFICATION CHECKLIST

WHAT IT IS

A Waste Identification Checklist helps teams systematically review a process against all 8 Lean waste types (TIMWOODS): Transportation, Inventory, Motion, Waiting, Overproduction, Overprocessing, Defects and Skills (unused talent). For each waste category, record whether it is present (Yes/Sometimes/No), describe what the waste looks like, its impact, estimated cost or time, the recommended action and the owner.

WHY WE USE IT

A Waste Identification Checklist walks a process step by step and asks 'is each Lean waste present here?'. It produces a quick, structured first pass at where Lean improvement should focus.

BENEFITS

- Surfaces specific waste examples rather than vague 'there's waste here'
- Acts as a fast scoping tool before deeper analysis
- Builds Lean eyes in the team running the checklist

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

WASTE IDENTIFICATION CHECKLIST

Review the process against all 8 Lean waste categories (TIMWOODS). WASTE IDENTIFICATION

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS WASTE IDENTIFICATION?

A Waste Identification Checklist helps teams systematically review a...

WASTE REGISTER

Complete one row per waste category

Waste Type	Observed	Description of Waste	Impact	Estimated Cost / Time	Recommended Action	Owner
Transportation	Yes	Complaints routed through 3 separate systems (email → shared inbox →...	High	~3.1 min × 800 cases/month = 41h wasted per month	CRM direct-entry from email — eliminate manual transfer step	IT Lead
Inventory	Yes	Average of 42 complaints sitting in queue >48 hours at any one time.	High	42 cases × avg 2 extra days = 84 case-days of delay monthly	Investigation checklist to reduce per-case time; SLA alert at 48h	James Carter
Motion	Yes	Agents switch between CRM	Medium	~2.5 min of system switching per case = 33h/month across team	Single-screen CRM process view; authority guide embedded in CRM	IT Lead
Waiting	Yes	Average 6.2 hours from complaint receipt to acknowledgement...	High	2.2h average overrun × 800 cases/month = 1,760h customer wait/month	CRM SLA alert at 4h; clear authority levels to eliminate wait for approval	CS Team Lead
Overproduction	Sometimes	Complaint details entered separately in both CRM and email systems.	Medium	~1h per agent per week in duplicate entry = 12h/month across team	Single system entry — CRM auto-populates from email. SOP: investigate first	IT Lead
Overprocessing	Yes	Low-value complaints (e.g.	Medium	~1.5h per week of unnecessary approval across team	Authority levels guide — tier-based resolution without senior approval	CS Team Lead
Defects	Yes	38% repeat contact rate — customers calling back for the same...	High	38% of 800 = 304 repeat contacts/month × ~10.5 min = 53h rework	Investigation checklist + mandatory root cause coding in CRM	James Carter
Skills (unused talent)	Sometimes	Experienced agents not sharing resolution expertise with...	Low	Difficult to quantify — visible in variability of investigation time	Monthly peer review sessions; standard work template to...	CS Team Lead

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WASTE IDENTIFICATION CHECKLIST

WASTE IDENTIFICATION

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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BUSINESS AREA

WASTE REGISTER

Waste Type	Impact	Recommended	Owner
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Transportation

Inventory

Motion

Waiting

Overproduction

Overprocessing

Defects

SECTION 02 OF 02

FLOW & EFFICIENCY

Measure and design flow so work moves without waiting

Flow & Efficiency tools quantify how work actually moves through your process — cycle time, takt time, lead time, throughput, capacity and bottlenecks. They expose where work is waiting, where it is overloaded, and where it can be balanced. This is the analytical side of Lean: making the flow problem visible before you redesign it.

TEMPLATES IN THIS SECTION

9 templates

The pages that follow take each flow & efficiency template in turn. Read the description, the rationale and the benefits; study the completed example; then use the blank version to apply it to your own work.

TEMPLATE 01 OF 09 · FLOW & EFFICIENCY

BOTTLENECK ANALYSIS

WHAT IT IS

A Bottleneck Analysis identifies the step in a process that limits overall throughput. The bottleneck is typically the step with the longest cycle time per unit — constraining how fast the whole process can operate. Resolving the bottleneck increases total capacity. After fixing one bottleneck, the next longest step becomes the new constraint.

WHY WE USE IT

A Bottleneck Analysis identifies the single step that limits overall flow — the constraint — and quantifies the impact. Lean theory says the system can only move as fast as its bottleneck.

BENEFITS

- Focuses improvement where it actually moves overall output
- Prevents wasted effort optimising non-bottleneck steps
- Quantifies the cost of the constraint in real numbers

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First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

BOTTLENECK ANALYSIS

For each process step, record the cycle time and team size. The step with the highest cycle time (per agent) is the bottleneck — the constraint that limits total throughput. BOTTLENECK ANALYSIS

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS BOTTLENECK ANALYSIS?

A Bottleneck Analysis identifies the step in a process that limits overall throughput. The bottleneck is typically the step with the longest cycle time per unit — constraining how fast the whole process can operate. Resolving the bottleneck increases total capacity. After fixing one bottleneck, the next longest step becomes the new constraint.

STEP ANALYSIS

All capacity calculations assume a 7-hour productive working day

Process Step	Cycle Time (min)	Team Size	Max Cap (units/hr / agent)	Team Daily Capacity	Utilisation %	Action / Focus
Acknowledge complaint	1.5	12	40.0	3360	1.2%	Maintain
Transfer email to CRM (NVA)	3.1	12	19.4	1626	2.5%	Eliminate — CRM-email integration project
Investigate complaint	8.5	12	7.1	593	6.7%	Primary target — investigation checklist reduces to 4.5 min
Check authority level	2.1	12	28.6	2400	1.7%	Authority levels guide — reduce to <0.5 min
Apply resolution	1.1	12	54.5	4582	0.9%	Maintain — monitor escalation rate
Communicate closure	2.4	12	25.0	2100	1.9%	Standard script to reduce variability
Code root cause and close CRM	0.9	12	66.7	5600	0.7%	Mandatory CRM field — enforce compliance

BOTTLENECK IDENTIFIED

Bottleneck: "Investigate complaint" — cycle time 8.5 min/unit. This is the step limiting total throughput. Prioritise improvement here before addressing other steps.

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BOTTLENECK ANALYSIS

BOTTLENECK ANALYSIS

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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BUSINESS AREA

STEP ANALYSIS

Process Step	Cycle Time (min)	Team Size	Team Daily Capacity	Utilisation %	Action / Focus
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TEMPLATE 02 OF 09 · FLOW & EFFICIENCY

CAPACITY PLANNING SHEET

WHAT IT IS

A Capacity Planning Sheet ensures the team has sufficient capacity to meet projected demand over time. For each period, define the forecast volume, average handling time (AHT), team size and working time per agent. The sheet calculates total work required vs. capacity available, flags gaps and allows you to plan actions ahead of time.

WHY WE USE IT

A Capacity Planning Sheet compares the demand on a process with its available capacity by resource, period and skill. It exposes overloads and underuse before they become missed targets.

BENEFITS

- Makes capacity gaps visible weeks before they bite
- Provides defensible numbers for hiring or rebalancing decisions
- Catches imbalanced load between people, shifts or sites

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

CAPACITY PLANNING SHEET

For each period, forecast demand volume CAPACITY PLANNING

Project Title	Project T	Sponsor	Version	Date	Updated By				
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter				
BUSINESS AREA	Customer Service								
WHAT IS CAPACITY PLANNING?	A Capacity Planning Sheet ensures...								
CAPACITY PLAN			Demand × AHT = Total work required.						
Period	Demand Forecast	AHT (min)	Agents Available	Working Time/Agent (min)	Total Work Required (min)	Total Capacity Available (min)	Utilisation %	Action	Notes
Jan 2026 (Baseline)	800	10.5	12	420	8,400	110,880	7.6%	Monitor — no capacity gap.	Baseline month — investigation...
Feb 2026	800	10.5	12	420	8,400	110,880	7.6%	Monitor — no capacity gap.	Kaizen event held — checklist...
Mar 2026	820	9.5	12	420	7,790	110,880	7.0%	Monitor — investigation...	Checklist live from 01 Mar.
Apr 2026	840	8.5	12	420	7,140	110,880	6.4%	Review CRM integration project progress...	Authority guide live — escalation...
May 2026	850	8.5	12	420	7,225	110,880	6.5%	Maintain.	Stable period — good headroom...
Jun 2026	900	8.0	12	420	7,200	110,880	6.5%	CRM-email integration target live — AHT...	CRM integration removes 3.1 min/case...
Jul 2026	1000	8.0	12	420	8,000	110,880	7.2%	Seasonal uplift — review capacity.	Holiday demand pattern — complaint...
Aug 2026	1100	8.0	14	420	8,800	129,360	6.8%	2 additional agents trained...	Peak summer period.

For downloadable templates go to <https://www.simplicityhub.co.uk/templates.html>

For simulated calculators go to <https://www.simplicityhub.co.uk/tools.html>

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CAPACITY PLANNING SHEET

CAPACITY PLANNING

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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BUSINESS AREA

CAPACITY PLAN

Period	Demand Forecast	AHT (min)	Agents Available	Utilisation %	Action	Notes
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TEMPLATE 03 OF 09 · FLOW & EFFICIENCY

LEAD TIME CALCULATOR

WHAT IT IS

Lead time efficiency = $\text{Process Time} \div \text{Total Lead Time}$. In most service processes, lead time efficiency is <10% — meaning more than 90% of the time the work is waiting rather than being worked on. Use this template to decompose total lead time into its components and identify where the largest opportunities for reduction lie.

WHY WE USE IT

A Lead Time Calculator breaks total elapsed time into process time, wait time and queue time at each step. It exposes how little of the total time is actually spent adding value.

BENEFITS

- Quantifies how much of lead time is wait, not work
- Identifies the biggest single source of delay
- Provides a baseline for flow improvement projects

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

LEAD TIME CALCULATOR

Break down end-to-end lead time into process time, queue time, transport and rework — and calculate lead time efficiency. LEAD TIME CALCULATOR

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS LEAD TIME CALCULATOR?

Lead time efficiency = Process Time ÷ Total Lead Time.

LEAD TIME BREAKDOWN

All times in minutes. Convert queue and wait times from hours/days as needed.

Step	Process Time (min)	Queue / Wait (min)	Transport (min)	Rework Allow. (min)	Step Total	Notes
Complaint received → Acknowledged	1.5	282	0	0	4.7 hrs	Avg 4.7 hours from receipt to acknowledgement (target: 4h). CRM SLA alert now in place — monitoring.
Acknowledged → Investigation started	0	1080	0	0	18.0 hrs	Average 18 hours queue wait between acknowledgement and investigation starting. This is the largest NVA component.
Investigate complaint	8.5	0	3.1	0	11.6 min	Process time: 8.5 min investigation + 3.1 min email-to-CRM transfer (transport). Target: 4.5 min process, 0 transport (CRM integration).
Resolution determination / authority check	3.2	120	0	0	2.1 hrs	2-hour queue wait when cases escalate to Team Leader for approval. Authority levels guide will reduce escalation rate from 11% to <5%.
Apply resolution	1.1	60	0	0	1.0 hrs	Approx. 1-hour wait between resolution determined and closure communication sent — rework/checking loop.
Communicate closure and CRM close	3.3	0	0	14	17.3 min	17.5-minute rework allowance reflects 38% repeat contact rate — cases reopened and reworked.

SUMMARY

Total Lead Time 1.1 days

Total Process Time (VA) 17.6 min (1.1% efficiency)

Total Queue / Wait Time (NVA) 1.1 days (97.8% of lead time)

Total Transport Time (NVA) 3.1 min

Lead Time Efficiency 1.1%

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LEAD TIME CALCULATOR

LEAD TIME CALCULATOR

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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BUSINESS AREA

LEAD TIME BREAKDOWN

Step	Process Time (min)	Queue / Wait (min)	Transport (min)	Rework Allow. (min)	Step Total	Notes
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TEMPLATE 04 OF 09 · FLOW & EFFICIENCY

Process Flow Checklist

WHY WE USE IT

A Process Flow Checklist is a quick step-by-step diagnostic for any process — checking for handoffs, queues, rework loops, decision points and value-add. It is the lightest possible 'look at the flow' tool.

BENEFITS

- Surfaces flow issues without a full mapping exercise
- Usable in a 30-minute session with the team
- Good first pass before committing to a Value Stream Map

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Process Flow Checklist

SimplicityHub™ — Process Flow Checklist

Walk through a process step by step and check for common flow problems like batching, rework and handoffs.

Stage: Lean — Flow & Efficiency | Level: Beginner | Best for: A quick structured review of process flow without needing specialist Lean knowledge.

Step #	Step Description	Adds Value? (Y/N)	Handoff? (Y/N)	Rework? (Y/N)	Batching? (Y/N)	Wait? (Y/N)	Improvement Idea
1	Receive customer request via email	Y	N	N	Y — checked hourly	Y — up to 60 mins	Check emails every 15 mins

TEMPLATE 05 OF 09 · FLOW & EFFICIENCY

Simple Cycle Time Log

WHY WE USE IT

A Simple Cycle Time Log records how long each unit of work takes, repeatedly, so you can see the average, the variation and the outliers. It is the simplest possible flow measurement tool.

BENEFITS

- Generates real cycle-time data with no special tools
- Reveals variation that averages alone would hide
- Builds the dataset behind takt-time and capacity decisions

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Simple Cycle Time Log

SimplicityHub™ — Simple Cycle Time Log

Record how long each step in a process takes so the team can see where time is spent and where delays occur.

Stage: Lean — Flow & Efficiency | Level: Beginner | Best for: First-time process timing when the team wants basic data without complex tools.

Step #	Step Name	Start Time	End Time	Duration (mins)	Waiting Time (mins)	Notes
1	Receive order	09:00	09:02	2	0	Automated notification
2	Check stock availability	09:02	09:08	6	0	Manual system check
3	Pick items from shelf	09:08	09:22	14	3	3 mins walking between aisles
4	Pack order	09:22	09:30	8	5	Waited for packing materials
5	Print label and dispatch	09:30	09:34	4	0	

TEMPLATE 06 OF 09 · FLOW & EFFICIENCY

Wait Time Tracker

WHY WE USE IT

A Wait Time Tracker measures the time work spends queueing between steps. In most processes, wait time dwarfs process time — and is invisible without deliberate measurement.

BENEFITS

- Reveals the largest hidden cost in most processes
- Quantifies the gap between process time and lead time
- Targets the wait that improvement will reduce the most

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Wait Time Tracker

SimplicityHub™ — Wait Time Tracker

Log every time work stops or waits so the team can see how much delay is hidden in the process.

Stage: Lean — Flow & Efficiency | Level: Beginner | Best for: Making invisible waiting time visible so it can be reduced or removed.

Date	Process Step	Wait Started	Wait Ended	Duration (mins)	Reason for Wait	Avoidable? (Y/N)	Suggested Fix
10/04/2026	Packing	10:15	10:28	13	Waiting for labels to print	Y	Move printer closer

TEMPLATE 07 OF 09 · FLOW & EFFICIENCY

TAKT TIME CALCULATOR

WHAT IT IS

Takt time is the rate at which the process must produce one unit to meet customer demand. It is calculated by dividing net available time by customer demand. Comparing each step's cycle time to takt time identifies steps at risk of becoming bottlenecks.

WHY WE USE IT

A Takt Time Calculator divides available production time by customer demand to produce the pace the process must run at to meet demand without overproducing. It is the heartbeat of Lean flow.

BENEFITS

- Sets a single, defensible target pace for the process
- Reveals over- or under-staffed steps relative to demand
- Anchors standard work and capacity planning to customer demand

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

TAKT TIME CALCULATOR

Takt Time = Net Available Time ÷ Customer Demand. TAKT TIME CALCULATOR

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS TAKT TIME CALCULATOR?

Takt time is the rate at which the process must...

INPUTS

Gross working time per day (min) 450
 Planned downtime per agent per day (min) 30
 Number of agents / operators 12
 Process time allocation (%) 40
 Customer demand per day (units) 40

CALCULATED RESULTS

Net available time per agent (min) 420
 Total team capacity (min) 5040
 Process-specific capacity (min) 2016
 TAKT TIME (min per unit) 50.4

STEP COMPARISON — CYCLE TIME VS TAKT TIME

Process Step	Cycle Time	vs Takt Time	Operator / Notes
Acknowledge complaint	1.5	1.5 / 50.4 min = 3% of takt	CS Agent — CRM entry and acknowledgement...
Transfer email to CRM	3.1	3.1 / 50.4 min = 6% of takt	CS Agent — Manual duplicate entry — NVA step.
Investigate complaint	8.5	8.5 / 50.4 min = 17% of takt	CS Agent — Fact gather
Check authority level	2.1	2.1 / 50.4 min = 4% of takt	CS Agent — Check escalation criteria — NVA.
Apply resolution	1.1	1.1 / 50.4 min = 2% of takt	CS Agent / TL — Resolve or escalate.
Communicate closure	2.4	2.4 / 50.4 min = 5% of takt	CS Agent — Standard closure script...
Code root cause and close CRM	0.9	0.9 / 50.4 min = 2% of takt	CS Agent — CRM mandatory field post-improvement.

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TAKT TIME CALCULATOR

TAKT TIME CALCULATOR

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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BUSINESS AREA

INPUTS

450

30

100

CALCULATED RESULTS

420

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STEP COMPARISON — CYCLE TIME VS TAKT TIME

Process Step	Cycle Time (min)	vs Takt Time	Operator / Notes
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TEMPLATE 08 OF 09 · FLOW & EFFICIENCY

THROUGHPUT TRACKER

WHAT IT IS

A Throughput Tracker monitors process output volume over time — comparing planned to actual throughput for each period. Track weekly, fortnightly or monthly performance. Calculate variance (actual minus target) and cumulative totals. Use to identify trends, demonstrate improvement over time and provide evidence for project benefit realisation.

WHY WE USE IT

A Throughput Tracker records how much work the process completes per period — day, shift or hour. It is the headline measure of flow performance over time.

BENEFITS

- Makes the trend in completed work obvious at a glance
- Flags drops in flow performance early
- Provides the before/after evidence for flow improvements

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

THROUGHPUT TRACKER

Track planned vs actual throughput period by period — with variance, cumulative totals and trend analysis. THROUGHPUT TRACKER

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS THROUGHPUT TRACKER?

A Throughput Tracker monitors process output volume over time — comparing planned to...

THROUGHPUT REGISTER

Complete one row per period

Period	Target	Actual	Variance	Variance	Cumulative	Notes
Wk 1 — 05 Jan 2026	200	185	-15	-7.5%	185	Pre-improvement baseline. Long investigation times and no standard process.
Wk 2 — 12 Jan 2026	200	190	-10	-5.0%	375	Kaizen event planned — team aware of upcoming changes.
Wk 3 — 19 Jan 2026	200	195	-5	-2.5%	570	Kaizen event held (14–15 Jan). Minor disruption during event — agents observed and involved in design.
Wk 4 — 26 Jan 2026	200	200	0	0.0%	770	Investigation checklist drafted and being tested. Authority levels guide in draft.
Wk 5 — 02 Feb 2026	200	210	10	5.0%	980	Investigation checklist live — all agents trained. AHT beginning to reduce. Fewer unnecessary escalations.
Wk 6 — 09 Feb 2026	200	215	15	7.5%	1195	Authority levels guide embedded in CRM — escalation rate falling. Agents more confident in resolution.
Wk 7 — 16 Feb 2026	200	220	20	10.0%	1415	Consistent improvement. CRM knowledge base reducing investigation time variability.
Wk 8 — 23 Feb 2026	200	218	18	9.0%	1633	Performance sustained above target. TTR average now 4.1 days (vs 5.2 days baseline). Trajectory is positive.
Wk 9 — 02 Mar 2026	200	225	25	12.5%	1858	CRM-email draft integration spec agreed. CSAT improving.
Wk 10 — 09 Mar 2026	200	222	22	11.0%	2080	Slight dip — 2 agents on planned leave. Capacity managed by TL.
Wk 11 — 16 Mar 2026	200	230	30	15.0%	2310	Best week to date. Peer review sessions started — experienced agents sharing resolution techniques.
Wk 12 — 23 Mar 2026	200	228	28	14.0%	2538	End of Q1. Throughput sustainably above target. AHT now 8.5 min (vs 10.5 min baseline).

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THROUGHPUT TRACKER

THROUGHPUT TRACKER

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

THROUGHPUT REGISTER

Period	Target	Actual	Variance	Variance %	Cumulative	Notes
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TEMPLATE 09 OF 09 · FLOW & EFFICIENCY

WORKLOAD BALANCING SHEET

WHAT IT IS

A Workload Balancing Sheet assigns process steps to operators and compares the total work content per operator against the takt time. Steps with work content above takt represent potential bottlenecks or capacity issues. The goal is to redistribute work so that each operator's total is at or below takt, while maximising value-added time.

WHY WE USE IT

A Workload Balancing Sheet compares the cycle time of each step against takt time and against the other steps. It exposes where work is piling up and where capacity is idle.

BENEFITS

- Visualises imbalance between steps in one chart
- Identifies steps that need work moved off them or on to them
- Produces a balanced design that flows at takt time

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

WORKLOAD BALANCING SHEET

Assign each process step to an operator, enter cycle time and classify VA/NVA. WORKLOAD BALANCING

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS WORKLOAD BALANCING?

A Workload Balancing Sheet assigns process steps to operators and compares the total work content...

TAKT TIME REFERENCE

Takt Time: 50.4 min — Total operator work content must not exceed this value

PROCESS STEPS

Complete one row per step in the process

Process Step	Cycle Time (min)	Operator / Role	VA/NVA	Notes
Acknowledge complaint	1.5	CS Agent	VA	CRM log + acknowledgement. SLA: 4 hours from receipt.
Transfer email to CRM	3.1	CS Agent	NVA	Duplicate manual entry — CRM integration will eliminate. Target: 0 min.
Investigate complaint (current)	8.5	CS Agent	VA	Fact gather + root cause. High variability. Investigation checklist target: 4.5 min.
Check authority level	2.1	CS Agent	NNVA	Authority guide will reduce to <0.5 min. Currently involves system switching.
Apply resolution	1.1	CS Agent / TL	VA	Resolution applied in CRM. Quick once authority confirmed.
Communicate closure	2.4	CS Agent	VA	Standard closure script. Personal touches add 0.5 min per case.
Code root cause and close CRM	0.9	CS Agent	NNVA	Mandatory post-improvement. Currently skipped in 2/5 cases.

OPERATOR WORKLOAD SUMMARY

Operator / Role	Total Work Content	vs Takt Time	Assessment
CS Agent	18.5	37% of takt	63% headroom — within takt
CS Agent / TL	1.1	2% of takt	98% headroom — within takt

BLANK TEMPLATE

WORKLOAD BALANCING SHEET

WORKLOAD BALANCING

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
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1.0

BUSINESS AREA

TAKT TIME REFERENCE

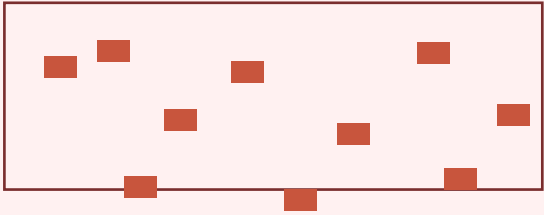
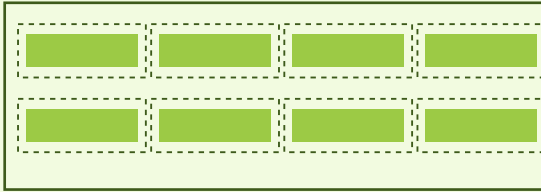
PROCESS STEPS

Process Step	Cycle Time (min)	Operator / Role	VA/NVA	Notes
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VISUAL REFERENCE · 01 OF 08

5S — before & after

5S transforms a chaotic workspace into one where every tool has a place, problems are visible, and standards are maintained. Below: the same workstation before and after a 5S event.

BEFORE	AFTER
Chaotic workstation  ■ Tools scattered across surfaces ■ Time wasted searching ■ Trip and contamination risk ■ No clear standard or owner ■ Issues hidden under clutter	Organised workstation  ■ A place for everything, in its place ■ Fast retrieval — zero search time ■ Standards visible and maintained ■ Drift visible immediately ■ Owned, audited and sustained

THE FIVE S'S

1S Sort	2S Set in order	3S Shine	4S Standardise	5S Sustain
Remove what isn't needed — keep only what is used.	A place for everything; the right place is the closest place.	Clean as inspection — surfaces reveal abnormalities.	Agree the standard so anyone can maintain the area.	Audit, coach, recognise — make the standard a habit.

VISUAL REFERENCE · 02 OF 08

The 8 wastes — TIMWOODS

Lean defines eight categories of waste — anything that consumes resources without adding value for the customer. Remember them with the mnemonic TIMWOODS.

T**Transport**

Moving materials, work or information further than needed.

I**Inventory**

Stock, queues or backlog beyond what's needed right now.

M**Motion**

Unnecessary movement by people — reaching, walking, searching.

W**Waiting**

People or work standing idle waiting for the next step.

O**Overproduction**

Making more, sooner or faster than the next step needs.

O**Overprocessing**

Doing more to the work than the customer values or requires.

D**Defects**

Errors that need to be reworked, scrapped or apologised for.

S**Skills (unused)**

Talent, ideas and experience of people that go untapped.

VISUAL REFERENCE · 03 OF 08

Standard work — visualised

Standard Work documents the current best-known way to do a task — the steps, the time, and the key quality points. Below: a simplified Standard Work Combination Sheet showing six steps balanced against takt time.

STEP	SEC	TIME PROFILE (takt 75s)
Receive request	8s	
Validate customer	14s	
Walk to printer	3s	
System processing	22s	
Walk back to desk	3s	
Confirm to customer	10s	

TAKT

Manual time
 Auto / machine
 Walk time

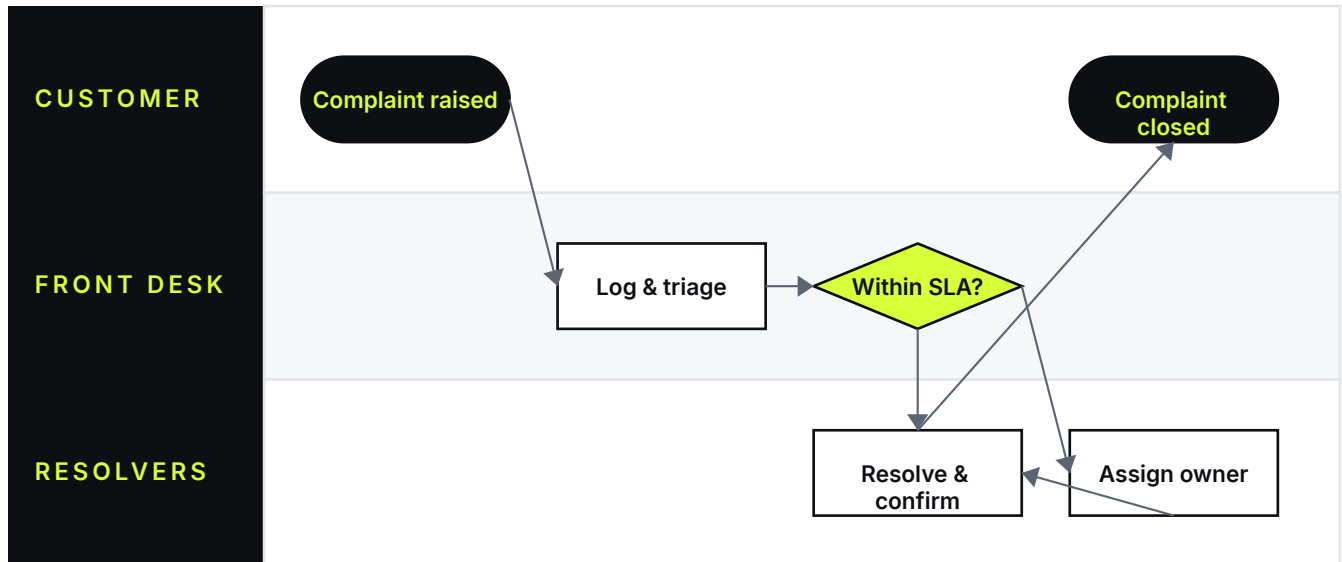
WHY STANDARD WORK MATTERS

- Single, agreed reference for how the task should be done.
- Surfaces variation between operators and shifts.
- Makes training faster and consistent.
- Provides the baseline against which improvement is measured.

VISUAL REFERENCE · 04 OF 08

Process map — example

A process map shows the actual steps, decisions and handoffs in a process. Below: a simplified customer complaint resolution process across three roles.



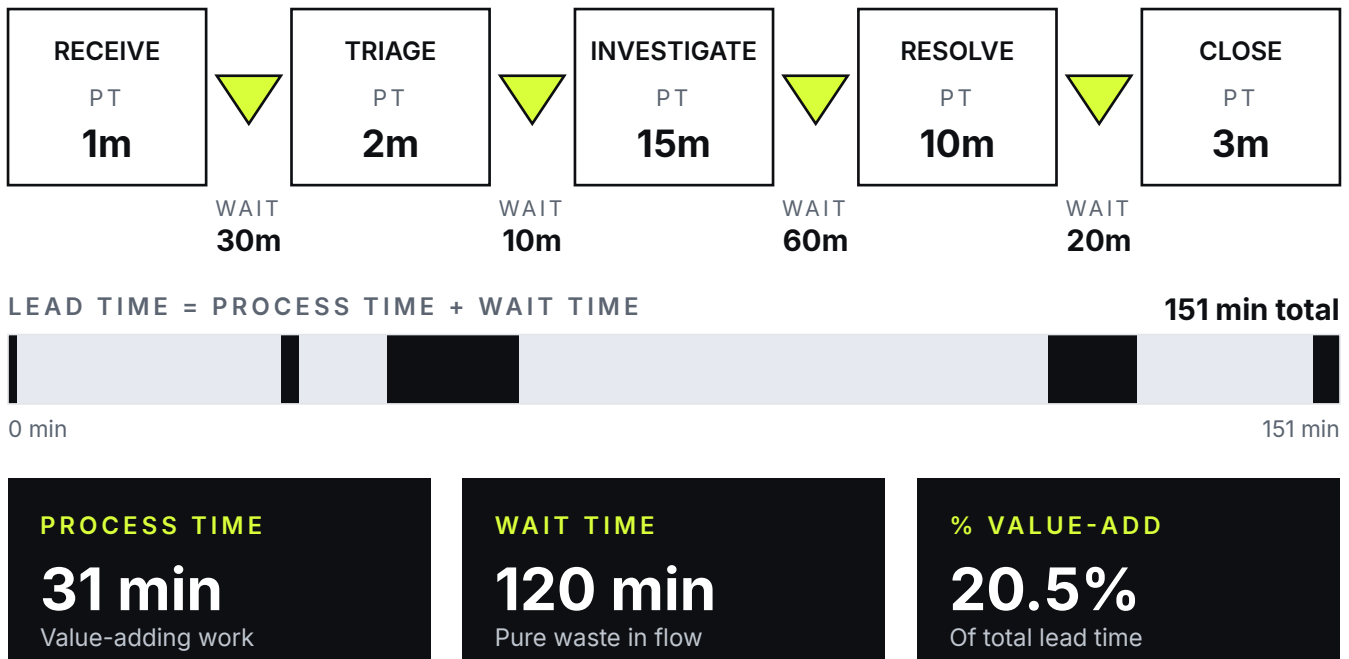
WHAT A PROCESS MAP REVEALS

- Every handoff between roles — the most common source of delay.
- Decision points that route work into rework loops.
- Steps that look the same on paper but are owned by different teams.
- The actual path work takes, not the path people think it takes.
- A shared picture the team can challenge and improve together.

VISUAL REFERENCE · 05 OF 08

Value stream map — at a glance

A value stream map shows every step needed to deliver value, with the process time and wait time at each. It exposes how little of total lead time is actually spent adding value.



Black blocks = process time (PT, value-adding). Grey blocks = wait time (WT, non-value-adding). Triangles = inventory or queue between steps.

VISUAL REFERENCE · 06 OF 08

Takt, cycle and lead time

Three Lean time measures that are often confused. Takt sets the pace demand requires; cycle is how long a step actually takes; lead time is the customer's full wait — usually dominated by waiting, not working.

TAKT TIME

Pace customer demand requires

Formula: Available time ÷ customer demand

Sets the rhythm the process must run at. If cycle > takt, you can't keep up.

CYCLE TIME

Time one step actually takes

Formula: Step end – step start

Compared against takt to find under- and over-loaded steps.

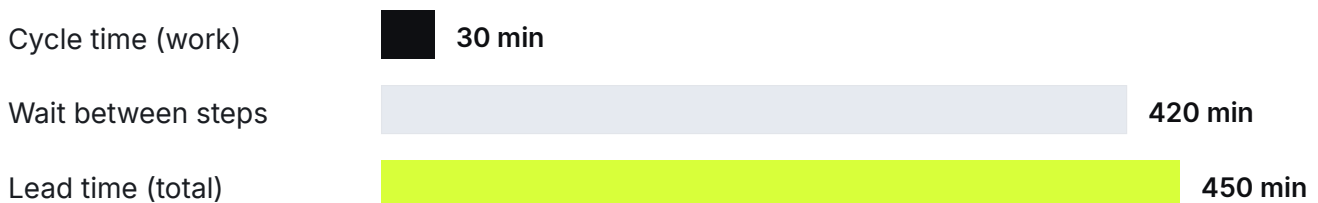
LEAD TIME

Total elapsed time end to end

Formula: First handoff → last delivery

Usually 80–95% wait time. The customer feels lead time, not cycle time.

WHY LEAD TIME DWARFS CYCLE TIME

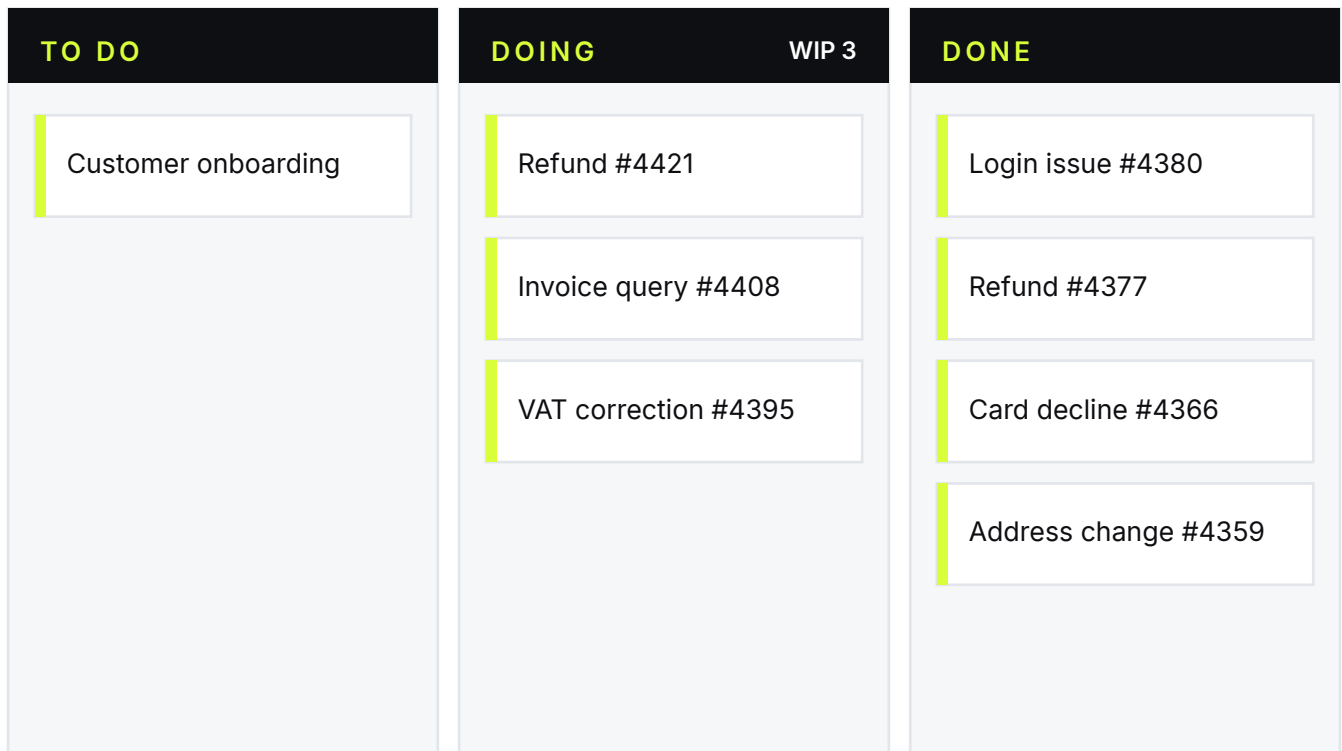


In this example the work itself takes 30 minutes — but the customer waits 450. Cutting cycle time helps; cutting wait time transforms the experience.

VISUAL REFERENCE · 07 OF 08

Pull systems & kanban

A kanban makes work visible and limits how much is in progress. The downstream step pulls the next item only when it's ready — replacing push-and-hope with a steady, demand-driven flow.



←
DOWNSTREAM PULLS THE NEXT ITEM WHEN READY

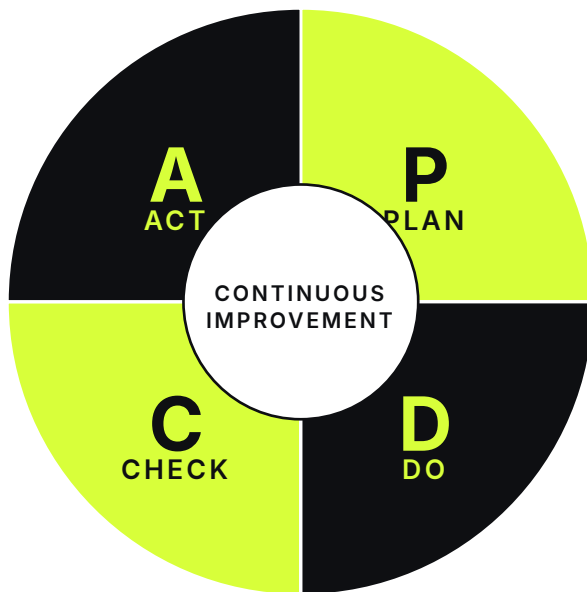
WHAT PULL & KANBAN DELIVER

- Caps work in progress — finishing becomes the priority, not starting.
- Makes overload visible the moment it happens.
- Surfaces the bottleneck — work piles up in front of it.
- Replaces push targets with steady, demand-driven flow.

VISUAL REFERENCE · 08 OF 08

The PDCA cycle

Plan, Do, Check, Act — the rhythm of continuous improvement. Every kaizen, every standard work update, every problem-solving session follows this loop.

**P****PLAN**

Define the problem, hypothesise the change, agree the measure of success.

D**DO**

Run the change on a small scale — a pilot, an experiment, a trial.

C**CHECK**

Compare results to the hypothesis. What actually happened, vs what you expected?

A**ACT**

Adopt, adapt or abandon. Standardise what worked; restart the loop for what didn't.

Lean treats improvement as a habit, not a project. Every loop should expose a new piece of waste — and remove it.