

PRODUCT REVIEW

Lean and Kaizen Templates

A common complaint often heard from those who embark on Lean manufacturing initiatives is, "Where can you get the forms, documents and data templates for supporting Lean initiatives." Oftentimes, companies are reduced to creating these needed items themselves, expending much time and energy in the process.

It seems at least one company has come up with an answer. This month we review a comprehensive series of spreadsheet templates, developed by Systems2Win of San Diego, which are intended to help users perform process improvement analysis associated with Lean and *kaizen* initiatives.

The Systems2Win templates, which are based on Microsoft Excel and Word, offer users a wide range of data capture and analysis tools that address most Lean and *kaizen* needs. Two families of templates are available: those for Lean Manufacturing and those for *kaizen* improvement. Lean Manufacturing templates include: value stream mapping, standard work, machine load balancing, time observation worksheet, product family matrix and a 5S evaluation scorecard. *Kaizen* improvement templates include a *kaizen* event checklist, team support roles, *kaizen* schedule, a *kaizen* event mandate and agenda for planning for a *kaizen* event, a *kaizen* action list, event summary and evaluation form for following up after an event.

The templates may be purchased individually or as a complete package bundled with other business improvement templates offered by Systems2Win. The bundled option is a most attractive proposition since the incremental price difference over purchasing individual templates is relatively small. According to Systems2Win, spreadsheet-based templates offer several advantages over software packages, including licensing for an unlimited number of users and, since they are developed on Microsoft Excel and Word, a smaller learning curve for users. The company also notes that a series of Six Sigma templates is currently under development and scheduled for release later this year.

In our review, we tested the value stream mapping template. Before actually using the template, we took advantage of Systems2Win's online demo and web-hosted introductory training session. This short training session gave us a guided tour of the spreadsheet and familiarized us with the layout of the template and the mechanics of building up a value stream map using a pre-formatted Microsoft Excel spreadsheet.

Systems2Win claims its templates are easy to use and we certainly encountered no difficulty in readily constructing a value stream map using live data. There are some intricacies associated with dragging and moving mapping icons on the spreadsheet, but once these are mastered, the process works quite well. We ran our review copy on a laptop loaded

with Microsoft Excel 2002 and encountered no bugs or problems. (As with all PC-based value stream mapping tools, we caution readers that these tools should not be used as a substitute for manual paper-and-pencil mapping, but rather as an additional tool for building a digital version of the map which facilitates ease of updating and ready distribution and communication.)

In building our value stream map, the template handled most of the mapping functions that we would expect to see quite well. As process data was entered, a box score showing total lead time through the system was auto-calculated by the spreadsheet. A minor drawback was that we had to manually enter the timeline data, from which the box score is calculated, by populating the required cells on the timeline below each process box with the required data. While a small inconvenience, this is something that is usually handled automatically in advanced value stream mapping software packages.

Our value stream mapping template came with an extensive library of standard mapping icons, a menu of online help, and a sample page showing what a finished value stream map might look like. Systems2Win will also "brand" templates with corporate logos to create a customized appearance for purchasers. Should the entire package of templates be purchased, these are made available to users through a web portal which is a boon for team leaders and team members who can easily find what they are looking for. The portal also facilitates the distribution and sharing of information across an enterprise, and improvement teams may also use the portal to maintain their own web pages of improvement initiatives.

All in all, the Systems2Win templates represent excellent value for the money. The value of these templates, in our estimation, resides in their variety: Systems2Win has created a template or form for just about every Lean or *kaizen* tool one could imagine. Users will find this extensive library of templates useful in meeting their needs for basic data tools, forms and documents as well as a useful and valuable addition to their Lean and *kaizen* efforts. ■

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