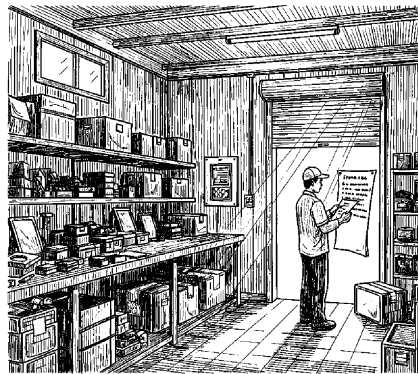


NICHE-SEARCH

WORKSHEET 6 OF 9

Lean Transformation Readiness Assessment

Use before committing to a structured lean programme — whether internally led or consultant-assisted. Honest answers prevent wasted implementation effort.



Complementary worksheet for
Lean Operations Principles
by Ibrahim Anwar

What This Is For

A pre-commitment diagnostic that tells the operator whether the business has the foundations required for a lean programme to succeed before anything is announced, scheduled, or paid for. Lean programmes fail most often not during implementation but because the conditions for sustaining improvements were not in place when the programme started. This assessment checks those conditions directly.

The eight areas assessed — management time, baseline data, work standards, employee input, visual management, bottleneck identification, improvement history, and audit mechanism — correspond to the specific failure modes documented in lean implementations across Indonesian and Southeast Asian SME operations. A programme launched into an environment with a total score below 16 will almost certainly produce initial improvements that erode within six months, because none of the sustaining mechanisms are present. Knowing this before committing to a programme is worth more than the time the assessment takes.

Benefits

What you get when you actually run this worksheet on a real situation:

- Identifies which single readiness area is the weakest link before committing to a programme, so pre-work can address it specifically.
- Prevents investment in external consultants or training for a programme the current operational environment cannot sustain.
- Provides a scored baseline that can be reassessed after 3–6 months of pre-work to confirm readiness has improved.
- Surfaces the difference between readiness that is claimed and readiness that is evidenced — the evidence column forces honest scoring.
- Sets realistic expectations about timeline: a score below 16 means foundational work first, not programme launch.

Framework To Use

— Eight-Area Readiness Scoring

Score each area 1–4. Total score determines readiness tier. Lowest-scoring area is the first pre-work target.

Score 1	Score 2	Score 3	Score 4
Not present — no evidence this element exists	Discussed or planned but not yet operational	Partially in place — present but inconsistent or incomplete	Fully in place — operational, consistent, verifiable

How To Use

Follow these steps in order. Each one builds on the previous.

- 1 Complete each row independently. Do not compare rows until all eight are scored.
- 2 For each row, score 1–4 using the scale above. Write the evidence or note in column four. A score of 3 or 4 with no evidence in column four should be reconsidered — if you cannot describe the evidence, the score may be 1 or 2.
- 3 Total the scores across all eight rows.
- 4 Interpret the total: below 16 means foundational work before programme commitment; 16–24 means ready for a structured rollout in one department; above 24 means system-wide programme is viable.
- 5 Identify the single lowest-scoring row. That area is the pre-work to complete before scheduling the first programme meeting.
- 6 Write one concrete action that would raise the lowest score by one point within two weeks. This is the only deliverable the assessment produces — one action, one timeline, one owner.
- 7 Reassess after completing the pre-work. Do not run a second full assessment until at least 8 weeks have passed — scores that improve in under a month are usually aspirational rather than evidenced.

Example Use

A 12-person food processing operation's owner is considering hiring a lean consultant after attending a workshop. Before signing any contract, the owner runs this assessment on a Saturday morning.

Management time: Score 2. The owner works 60-hour weeks and has not blocked recurring time for anything non-urgent in the past year. Evidence: no scheduled weekly review on the calendar. Note: "Would need to delegate 1 day/week of customer calls to free time."

Baseline data: Score 1. No throughput, lead time, or defect rate records exist. Monthly financials exist but contain no operational metrics. Evidence: none. Note: "Have never measured lead time. Don't know defect rate."

Work standards: Score 2. One written SOP exists (for the filling machine), but it is in a binder in the office, not posted in the work area. Evidence: the binder. Note: "Not visually posted."

Employee input: Score 1. No structured mechanism. The owner talks to employees but has not asked the specific waste question and has no record of responses. Evidence: none.

Visual management: Score 2. Abnormal conditions visible during a walk-through, but identified only by experienced staff — no visual marking system. Evidence: "Staff know where to look."

Bottleneck identified: Score 3. The owner can name it without a report: the mixing stage. Evidence: "Always has a queue in front of it. Known for 2 years."

Improvement history: Score 2. One improvement made 8 months ago (a new storage rack). Sustained. No other documented changes. Evidence: the rack exists.

Audit mechanism: Score 1. No recurring review of any process standard. Evidence: none.

Total score: 14. Below 16. Interpretation: foundational work first. Starting a programme now will produce changes that erode within six months because the sustaining mechanism (score 1) and baseline data (score 1) are both absent.

Lowest scores: Employee input (1), Baseline data (1), Audit mechanism (1). Owner's pre-work action: start the kaizen suggestion log this Monday (cost: zero). Begin recording weekly lead time per order in a simple spreadsheet this week. Schedule a 20-minute Tuesday morning walk as a recurring calendar item. Reassess in 10 weeks.

The Worksheet

Tear this out, copy it onto a fresh sheet, or fill it in directly.

Lean Transformation Readiness Assessment

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READINESS AREA	ASSESSMENT QUESTION	SCORE 1-4 (1 = NOT PRESENT, 4 = FULLY IN PLACE)	EVIDENCE OR NOTE
Management time	Can the owner or senior manager allocate 2-4 hours per week to lean activities for 6 months?		
Baseline data	Do throughput, lead time, and defect rate records exist for the past 3 months?		
Work standards	Is at least one critical activity documented in a posted one-page standard?		
Employee input	Have frontline employees been asked about waste in the past month?		
Visual management	Are any abnormal conditions currently visible without opening a report?		
Bottleneck identified	Can the owner name the operational bottleneck without consulting a report?		
Improvement history	Has any waste-reduction change been implemented and sustained for 3+ months?		
Audit mechanism	Is there any recurring (weekly or monthly) review that checks process standards?		

Reflection Prompts

After filling in the worksheet on the previous page, work through these.

1. Total score: add all eight rows. Below 16: foundational work (observation, one-page standards, 5S in one area) before any programme. 16–24: ready for structured rollout in one department. Above 24: system-wide programme is viable.
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2. Which single area scored lowest? That is the pre-work to complete before the first lean programme meeting. Write one concrete action to raise that score by 1 point within two weeks.
-

Tips and Traps

TIPS

- Score based on what is verifiable today, not what is being planned or intended. Planned = Score 1 or Score 2. Operational and consistent = Score 3 or 4.
- Do the assessment alone first, then validate the two lowest-scoring areas by asking a frontline employee one question each. Their answers often revise a 2 down to 1.
- If multiple areas score 1, address the audit mechanism row first. A working audit mechanism accelerates all other areas because it creates the feedback loop that sustains any pre-work improvements made.
- Treat the assessment as a six-monthly re-run, not a one-time gate. Readiness degrades when operational pressure returns — a score that was 22 six months ago may be 17 today if the sustaining mechanisms have drifted.

TRAPS

- Scoring Management time as 4 because the owner intends to allocate time, without checking whether that time is actually blocked on the calendar and protected from interruption.
- Treating a 'below 16' result as a reason not to start lean at all. Below 16 means foundational tools first — observation, one-page standards, the kaizen log — which are exactly the tools that raise the score.
- Completing the assessment but not identifying a single concrete pre-work action. An assessment without an action produces insight without change.

Appendixes

Appendix A – Scoring Anchor Descriptions by Area

Management time:

- Score 1: No recurring time blocked. Lean only happens reactively.
- Score 2: Intent to block time, but no calendar entry and no track record.
- Score 3: 1-2 hours per week is consistently available; some weeks disrupted.
- Score 4: 2-4 hours per week blocked and protected for 3+ consecutive months.

Baseline data:

- Score 1: No operational metrics recorded. Financials only.
- Score 2: Some metric tracked inconsistently (e.g. monthly returns, but not lead time).
- Score 3: Two of three core metrics tracked monthly (throughput, lead time, defects).
- Score 4: All three tracked monthly for 3+ months with consistent methodology.

Audit mechanism:

- Score 1: No recurring review of process standards.
- Score 2: Ad hoc reviews triggered by complaints, not a schedule.
- Score 3: Weekly or monthly review scheduled; runs most of the time.
- Score 4: Review runs consistently, deviation records exist, escalation criteria defined.

Appendix B – Minimum Pre-Work to Reach Score 16

If total score is below 16, these four actions are the fastest path to 16:

Action 1: Start the kaizen suggestion log this week (raises Employee input by 1-2).
Time required: 15 minutes per week. Cost: zero.

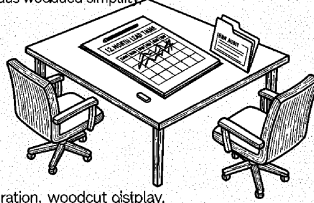
Action 2: Record lead time per order for 10 consecutive orders this week
(raises Baseline data by 1-2).
Time required: one timestamp at entry, one at customer confirmation.
Cost: zero.

Action 3: Post one existing work method as a one-page standard in the work area
(raises Work standards by 1-2).
Time required: 30 minutes to write, 5 minutes to post.
Cost: zero.

Action 4: Schedule a 20-minute recurring weekly walk into the calendar
(raises Management time and Audit mechanism by 1 each).
Time required: 20 minutes per week.
Cost: zero.

These four actions, sustained for 8 weeks, typically move a score of 12-14 to a score of 18-22 without any consultant engagement.

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WHERE THIS WORKSHEET COMES FROM

Lean Operations Principles

Eliminate Waste Before Adding Capacity

by Ibrahim Anwar

This worksheet is one of nine in the *Lean Operations Principles* companion worksheet pack. The full pack is grouped into three categories: high-volume worksheets you can run weekly, niche-search worksheets for rare but high-value situations, and specific-case worksheets that walk you through a single concrete scenario.

Every framework, decision filter, and figure used in these worksheets is drawn from the chapters of the source book. The book sets the diagnosis, the worksheets give you the form to act on it.

Available on Google Play Books

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