

# Lean Champion

## Role Overview

A Lean champion is an State employee with a broad-based knowledge of the Lean concepts and tools who will work with sponsors, project leaders, and team members to identify and implement process improvements. Lean champions should maintain a broad-based understanding of the Lean toolkit and methods by attending Lean training and through targeted self-study.

A champion brings expertise to departments and agencies of the State that are undergoing a Lean transformation and is the key focal point for deployment within their organization. Lean champions will coordinate with other Lean champions and the Lean Program Management Office (PMO) as appropriate to assess progress, enhance the toolkit, and recognize opportunities for cross-departmental collaboration. Lean champions will identify and develop future Lean project leaders and champions.

## Primary Lean Champion Role by Phase within the State of Colorado Lean Model

<b>1 - Learn Continuously</b>						
<ul style="list-style-type: none"> <li>▪ Develops and continually improves Lean skills</li> <li>▪ Trains and mentors Lean project leaders to competency on the Lean methodology</li> <li>▪ Coaches Lean project leaders through Lean continuous improvement projects</li> </ul>						
<p><b>2 - Identify and Select Projects</b></p> <ul style="list-style-type: none"> <li>▪ Facilitates deployment of Lean within an agency to support agency strategy, working in concert with sponsors and key leaders on strategic project identification</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>▪ Project Selection</li> </ul>	<p><b>3 - Scope and Approve Projects</b></p> <ul style="list-style-type: none"> <li>▪ Supports sponsors and key leaders with project scoping</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>▪ Project Scoping</li> <li>▪ SIPOC</li> </ul>	<p><b>4 - Envision Customer Experience</b></p> <ul style="list-style-type: none"> <li>▪ Coaches sponsors and Lean project leaders on development of value stream visions</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>▪ Gaining Customer Perspective and Feedback</li> <li>▪ Envision Customer Experience</li> </ul>	<p><b>5 - Evaluate Performance</b></p> <ul style="list-style-type: none"> <li>▪ Assists with value stream analyses to define improvement opportunities</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>▪ Value Stream Map</li> <li>▪ Lean Process Metrics</li> <li>▪ Value Add v. Non-Value Add</li> <li>▪ 8 Wastes</li> <li>▪ 5 Government Process Pitfalls</li> </ul>	<p><b>6 - Characterize Issues</b></p> <ul style="list-style-type: none"> <li>▪ May identify and allocate internal resources</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>▪ Process Flow Diagram</li> <li>▪ Check Sheet</li> <li>▪ Histogram / Pareto</li> <li>▪ Cause &amp; Effect / Fishbone</li> <li>▪ 5 Whys</li> <li>▪ Spaghetti Chart</li> </ul>	<p><b>7 - Solve Problems</b></p> <ul style="list-style-type: none"> <li>▪ Facilitates deployment of Lean within an agency to support agency strategy</li> <li>▪ Guides the project leader through the Lean process as needed</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>▪ 5S</li> <li>▪ Kaizen</li> <li>▪ A3</li> <li>▪ Workload Balancing</li> <li>▪ Product Family Matrix</li> <li>▪ Cellular Flow</li> <li>▪ Kanban</li> </ul>	<p><b>8 - Sustain Gains</b></p> <ul style="list-style-type: none"> <li>▪ Develops and implements sustainment plan in collaboration with executive leaders</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>▪ Visual Management Techniques</li> <li>▪ Mistake Proofing</li> <li>▪ Lean Daily Management (QDIP)</li> <li>▪ Sustainment Checklist</li> </ul>
<b>9 - Actively Manage Change</b>						
<ul style="list-style-type: none"> <li>▪ Maintains department master plan</li> <li>▪ Spearheads communications and manages change</li> <li>▪ Employs knowledge, tools and skills to create widespread commitment and manages the details of a change initiative</li> <li>▪ Maintains touch with Lean culture within an agency; takes actions to improve acceptance and acceleration of Lean</li> <li>▪ Coordinates with the Lean Program Office (PMO), as appropriate</li> </ul>						

# Lean Champion (cont'd)

## Keys to Success

- Continually improve Lean skills and further develop expertise through additional reading and case studies
- Be the voice of Lean strategy within your department/division, utilizing Lean principles to accelerate achievement of strategic objectives
- Facilitate regular meetings with sponsors and project leaders to discuss status, risks and issues, and next steps
- Focus on enabling project leaders and sponsors rather than completing the improvement process for them
- Provide regular feedback to team members, project leaders, and sponsors to help them continue their skill development and successful application of Lean principles and techniques
- Aggressively deploy change management tools to accelerate understanding and acceptance of the Lean mindset and methods

## Role Learning Path Guidelines

### Self Study

- State of Colorado Model: Tools and Methods (series of topic summaries executed as pre-work)

### Classroom Learning

- Lean project leader training (three full-day sessions)
- Lean facilitation training (one 4-hour session)
- Lean change management training (one 4-hour session)
- Lean manager training (as available)
- Lean acceptance training (as available)

### Application

- Complete a project selection exercise (or training on the same)
- Complete a project and document results
- Support Lean project leaders and sponsors in identifying and executing Lean projects
- Utilize Colorado Lean Program department work plan and other templates
- Mentor champions-in-training utilizing Lean mentoring approach
- As needed: Deliver training courses to sponsors and project leaders using classroom materials, simulations, and instructor guides

### Enrichment

- Lean champion eLearning modules at [co.bmgi.org](http://co.bmgi.org)
- Lean case studies
- Reading list of books and articles

#### Search Terms / Related Topics

- Lean project leader
- Roles and responsibilities
- Learning path

- Sponsor

# Lean Project Leader

## Role Overview

The Lean project leader is responsible for identifying improvement opportunities and facilitating project teams through Lean projects. The project leader will partner with Lean sponsors to develop and refine the scope of Lean projects, and will be the primary facilitator for Lean rapid improvement events (RIEs).

In this role, the project leader will gain knowledge of the different tools, methods, and techniques of Lean and be supported by a Lean champion. This knowledge will not only allow the project leader to evaluate value streams, analyze current issues, and define improvement solutions, but will also allow the project leader to carry the “Lean language” into the organization, helping others see improvement opportunities in their workplace.

## Primary Lean Project Leader Role by Phase within the State of Colorado Lean Model

<b>1 - Learn Continuously</b>						
<ul style="list-style-type: none"> <li>Develops and continually improves Lean skills</li> </ul>						
<p><b>2 - Identify and Select Projects</b></p> <ul style="list-style-type: none"> <li>Identifies potential Lean projects</li> <li>May facilitate project prioritization activities</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Project Selection</li> </ul>	<p><b>3 - Scope and Approve Projects</b></p> <ul style="list-style-type: none"> <li>Works with sponsor and champion to develop project scope for approval</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Project Scoping</li> <li>SIPOC</li> </ul>	<p><b>4 - Envision Customer Experience</b></p> <ul style="list-style-type: none"> <li>Supports the sponsor during the vision development</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Gaining Customer Perspective and Feedback</li> <li>Envision Customer Experience</li> </ul>	<p><b>5 - Evaluate Performance</b></p> <ul style="list-style-type: none"> <li>Parcels and focuses Lean efforts according to an analysis of value add vs. non-value add work in a process, as revealed through the value stream map</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Value Stream Map</li> <li>Lean Process Metrics</li> <li>Value Add v. Non-Value Add</li> <li>8 Wastes</li> <li>5 Government Process Pitfalls</li> </ul>	<p><b>6 - Characterize Issues</b></p> <ul style="list-style-type: none"> <li>Leads project teams to gather data and conduct analyses to characterize issues</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Process Flow Diagram</li> <li>Check Sheet</li> <li>Histogram / Pareto</li> <li>Cause &amp; Effect / Fishbone</li> <li>5 Whys</li> <li>Spaghetti Chart</li> </ul>	<p><b>7 - Solve Problems</b></p> <ul style="list-style-type: none"> <li>Leads Lean project teams and projects</li> <li>Reports progress and identifies barriers</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>5S</li> <li>Kaizen</li> <li>A3</li> <li>Workload Balancing</li> <li>Product Family Matrix</li> <li>Cellular Flow</li> <li>Kanban</li> </ul>	<p><b>8 - Sustain Gains</b></p> <ul style="list-style-type: none"> <li>Develops and implements sustainment plan in collaboration with organizational leaders</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Visual Management Techniques</li> <li>Mistake Proofing</li> <li>Lean Daily Management (QDIP)</li> <li>Sustainment Checklist</li> </ul>
<b>9 - Actively Manage Change</b>						
<ul style="list-style-type: none"> <li>Coordinates project change management activities</li> </ul>						

---

# Lean Project Leader (cont'd)

---

## Keys to Success

- Invest in upfront learning of Lean, focusing on the tools and techniques used to operationalize Lean
- Continually improve your skills as your experience grows
- Get the right people in the room that can help with Lean analysis, who work with and know the process, and are willing to invest in the Lean principles; as a facilitator of change, you do not always need to solve the problem yourself
- Leverage Lean templates and tools to enable organized and efficient group problem solving
- Utilize your sponsor and Lean champion as coaches through the Lean process
- Talk to other successful Lean project leaders to learn from their experiences

## Role Learning Path Guidelines

### Self Study

- State of Colorado Model: Tools and Methods (series of topic summaries executed as pre-work)

### Classroom Learning

- Lean project leader training (three full-day sessions)

### Application

- Execute Lean project(s) with support from your Lean champion and sponsor
- Utilize Colorado Lean Program department work plan and other templates as needed, such as:
  - Envision Customer Experience Guide
  - Lean Project Selection Guide

### Enrichment

- Lean champion eLearning modules at [co.bmgi.org](http://co.bmgi.org)
- Lean case studies
- Reading list of books and articles

#### Search Terms / Related Topics

- Roles and responsibilities
- Learning path
- Sponsor
- Champion

# Lean Sponsor

## Role Overview

A Lean sponsor is a business leader who advances the Lean culture by directing projects and owning their success. A sponsor must passionately support Lean teams before, during, and after Lean projects.

Lean sponsors chair the project steering committee, manage stakeholders, lead the value stream vision that guides business objectives, and lead the mitigation of project-related issues and risks.

As you accomplish training and gain project experience, it will become apparent how the Lean mindset integrates with your current management philosophy and can be used to advance your strategic agenda.

## Primary Sponsor Role by Phase within the State of Colorado Lean Model

<b>1 - Learn Continuously</b> <ul style="list-style-type: none"> <li>Develops and continually improves Lean skills</li> </ul>						
<b>2 - Identify and Select Projects</b> <ul style="list-style-type: none"> <li>Participates in or organizes project prioritization sessions to recognize projects</li> <li>Selects Lean project leaders and works with management to assign projects</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Project Selection</li> </ul>	<b>3 - Scope and Approve Projects</b> <ul style="list-style-type: none"> <li>Works with champions and LPLs to develop project scopes</li> <li>Approves projects that link to business strategy</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Project Scoping</li> <li>SIPOC</li> </ul>	<b>4 - Envision Customer Experience</b> <ul style="list-style-type: none"> <li>Leads visioning session and owns vision for each value stream</li> <li>Validates project proposals against vision</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Gaining Customer Perspective and Feedback</li> <li>Envision Customer Experience</li> </ul>	<b>5 - Evaluate Performance</b> <ul style="list-style-type: none"> <li>Helps project leaders select and deploy the correct value stream analysis tools</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Value Stream Map</li> <li>Lean Process Metrics</li> <li>Value Add v. Non-Value Add</li> <li>8 Wastes</li> <li>5 Government Process Pitfalls</li> </ul>	<b>6 - Characterize Issues</b> <ul style="list-style-type: none"> <li>Collaborates with managers to allocate project team</li> <li>Works with Lean project leaders to direct work plans and validate analyses</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Process Flow Diagram</li> <li>Check Sheet</li> <li>Histogram / Pareto</li> <li>Cause &amp; Effect / Fishbone</li> <li>5 Whys</li> <li>Spaghetti Chart</li> </ul>	<b>7 - Solve Problems</b> <ul style="list-style-type: none"> <li>Builds improvement infrastructure for sponsored projects</li> <li>Allocates team members to projects and removes roadblocks to project success</li> <li>Reviews project activity often with Lean project leaders</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>5S</li> <li>Kaizen</li> <li>A3</li> <li>Workload Balancing</li> <li>Product Family Matrix</li> <li>Cellular Flow</li> <li>Kanban</li> </ul>	<b>8 - Sustain Gains</b> <ul style="list-style-type: none"> <li>Drives the implementation of the team's solution</li> <li>Drives realization phase with finance representative assistance</li> <li>Actively monitors performance of improved processes</li> </ul> <p><u>Topics</u></p> <ul style="list-style-type: none"> <li>Visual Management Techniques</li> <li>Mistake Proofing</li> <li>Lean Daily Management (QDIP)</li> <li>Sustainment Checklist</li> </ul>
<b>9 - Actively Manage Change</b> <ul style="list-style-type: none"> <li>Manages the people aspects of process changes on an ongoing basis</li> <li>Selects steering team and project team for each project; hosts steering committee meetings</li> <li>Reports project activity to executive team</li> <li>Assists with culture change at the local level through communication and Lean management principles</li> </ul>						

---

# Lean Sponsor (cont'd)

---

## Keys to Success

- Invest in upfront learning of Lean and continuous development to guide your organization
- Partner with your project leaders on an ongoing basis, even after initial improvement implementation
- Lead a steering committee for each Lean project, selecting and working with members whose buy-in is needed for success
- Support your teams and entire organization with enthusiasm; model the way
- Utilize Lean to advance your strategic objectives by targeted improvements with an awareness of the collective impact
- Encourage a culture of continuous improvement by supporting creative thinking to drive both evolutionary and revolutionary changes

## Role Learning Path Guidelines

### Self Study

- State of Colorado Model: Tools and Methods (series of topic summaries executed as pre-work)

### Classroom Learning

- Lean sponsor training (two half-day sessions)
- Lean change management training (optional)
- Lean manager training (optional)
- Lean acceptance training (optional)

### Application

- Select, scope, and sponsor Lean project(s) with support from your Lean champion
- Utilize Colorado Lean Program department work plan and other templates as needed, such as:
  - Envision Customer Experience Guide
  - Lean Project Selection Guide

### Enrichment

- Lean sponsor eLearning modules at [co.bmgi.org](http://co.bmgi.org)
- Lean case studies
- Reading list of books and articles

#### Search Terms / Related Topics

- Lean project leader
- Roles and responsibilities
- Learning path
- Champion

# Steering Committee

## Role Overview

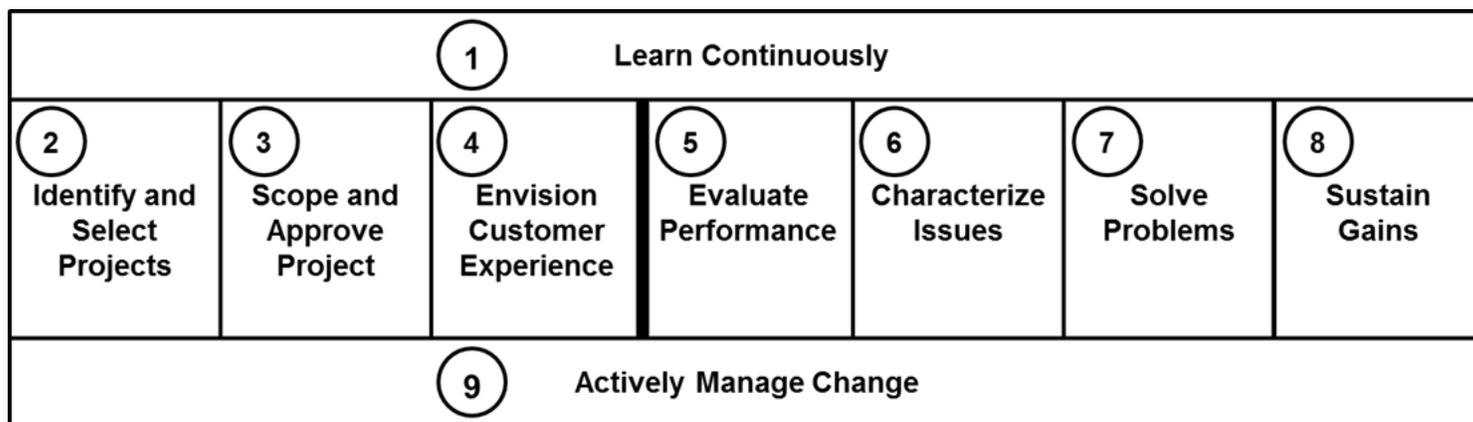
A steering committee is a team of senior-level leaders who guide Lean projects to their targeted outcomes. The group will typically be comprised of leaders and stakeholders from departments along the value stream and may include customer representatives (or proxies).

The role of the steering committee is to help define the vision of the Lean project, provide approval for any major decisions or issues, and act as the voice of the program throughout the broader organization. Typically, the steering committee is not involved in day-to-day project operations. Instead, the steering committee creates the environment in which the project team can define the improvements that will achieve success.

The steering committee should be identified early in the project and remain engaged through the entire process, meeting regularly to provide guidance and decision making support to the project team.

In the case of a large-scale change effort, a steering committee will be comprised of executive-level leaders who can, at their option, convene an advisory committee to provide day-to-day support of the Lean project team. In these instances, the steering committee should clarify the roles and responsibilities/division of duties of both committees, especially in the areas of resource commitment and decision making.

## State of Colorado Lean Model



## Keys to Success

- Understand the role of a vision in Lean projects
- Get in touch with customer needs and perception of value
- Commit resources and actively remove barriers to project success
- Actively participate in meetings, asking probing questions as appropriate and challenge the project team to come up with innovative solutions
- Be open to new methodology for change but also be willing to share your expertise

## Role Learning Path Guidelines

<u>Self Study</u>	<u>Classroom Learning</u>	<u>Application</u>	<u>Enrichment</u>
<ul style="list-style-type: none"> <li>▪ State of Colorado Model: Tools and Methods (series of topic summaries executed as pre-work)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Optional:               <ul style="list-style-type: none"> <li>– Lean manager training (as available)</li> <li>– Lean acceptance training (as available)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Support Lean project leaders and sponsors in executing Lean projects</li> </ul>	<ul style="list-style-type: none"> <li>▪ Lean sponsor eLearning modules at <a href="http://co.bmgj.org">co.bmgj.org</a></li> <li>▪ Lean case studies</li> <li>▪ Reading list of books and articles</li> </ul>

# Advisory Committee

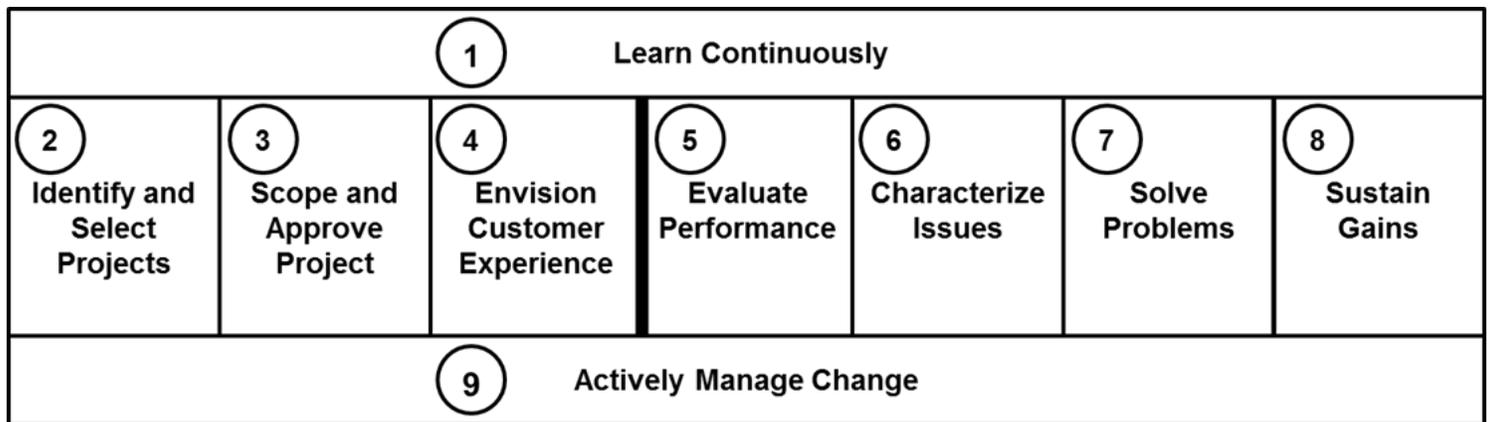
## Role Overview

An advisory committee is a group of middle and senior-level leaders convened to support large-scale Lean projects. An executive steering committee will establish this group and should clarify their responsibilities in terms of resource support and decision-making authority.

Advisory committees may be comprised of leaders from along the value stream, customer representatives, and perhaps representatives from a parallel departments that utilizes a similar process. It is important that these individuals understand and articulate the implications of proposed improvements, providing counsel to the steering committee on execution of the project team's final recommendations.

The advisory committee should be identified early in the process, remain engaged throughout the entire project, and meet regularly to provide consultation on business impacts to the Lean project team.

## State of Colorado Lean Model



## Keys to Success

- Continually improve Lean skills and further develop expertise through additional reading and case studies
- Commit resources and actively remove barriers to project success
- Clarify role division with the steering committee
- Actively participate in meetings and ask probing questions, as appropriate, and challenge the project team to come up with innovative solutions
- Participate in regular meetings with your committee and provide your insight on the value stream and how it might benefit from Lean improvements

## Role Learning Path Guidelines

### Self Study

- State of Colorado Model: Tools and Methods (series of topic summaries executed as pre-work)

### Classroom Learning

- Optional:
  - Lean manager training (as available)
  - Lean acceptance training (as available)

### Application

- Support Lean project leaders and sponsors in identifying and executing Lean projects

### Enrichment

- Lean champion eLearning modules at [co.bmgi.org](http://co.bmgi.org)
- Lean case studies
- Reading list of books and articles