Presentation Guidelines

- **Presentation Team:** Try to keep the number of presenters to 3 or less, but if the presentation requires more people include them.
- **Copies:** 10 copies for the judges unless told otherwise.
- **Time:** Presentation 15 minutes *(points are deducted for being too long)*, Questions 15 minutes

**Presentation**
- Background: Plain dark color such as black or blue
- Font: Comic Sans, minimum 20 point
- Font Color: Suggested White Bold *(If you use any color other than white, make sure it can be read. To improve visibility use a text with white background)*
- Graphics: Use pictures, charts, and data as illustrations, especially before & after.
- Kaizen Title: Make sure the title is specific. It should tie directly to the theme.
- **Each slide should have one important message that is summarized in one text block**
  - Use animation to highlight your summary block
  - Keep the words on the slides to a minimum by summarizing and emphasis the analysis.
  - Don’t restate all the data shown on the slides add to the data shown.
- Communicate your experiences at applying kaizen tools in your own words.
- Try to focus on the tools not on the results of the project.
- The presentation should flow from step to step, keep the sequence and make sure one slide leads into the next.

- **Practice, Practice, Practice!** Know your material and be comfortable with it.
- **Handling Questions**
  - Most questions taken from the audience will be intended to clarify points, and should not be taken personally
  - It is possible to anticipate most questions when practicing. Have an associate ask you questions while practicing.
  - Remain calm, whatever the tone or intention of the question, and repeat the question before answering.
  - Nerves may tempt you to make a hasty response, but just take a breath and think about your answer before you speak.
  - Remember everyone there is on your side and they want you to be successful.

Review the notes under each slide for more suggestions
Process Checklist

Step 1 Team Development
- Select team name
- List of team members w/ Code of Conduct
- Assign roles and responsibilities

Step 2 General Information
- Describe the history to your kaizen
- Show if the kaizen is a milestone in a bigger project
- Use

Step 3 Theme selection
- Complete your theme selection matrix (if applicable)
- Justification of theme selection
- Theme Linkage to business plan

Step 4 Activity Plan
- Complete time line (Plan)
- Add Actual results
- Explain significant gaps
- Management Gate Review

Step 5 Data Collection For Current Situation
- Visual display and thorough description of theme
- Examples of data sources
- Data collected and displayed in appropriate graphs
- Comparison time frame identified
- Additional data as required on other conditions which apply
- All graphs correctly constructed

Step 6 Root Cause Analysis / Verification / Identification
- List all possible causes
- Evidence of checking against the actual situation
- Cause and Effect diagram completed
- Potential root cause(s) are identified and highlighted
- Root cause investigation is completed
- Data/proof to verify root causes collected
- Verified Root cause(s) are identified

Step 7 Goal Setting
- Goal set against core data
- Goal logic is explained and displayed graphically
- Management Gate Review

Step 8 Countermeasure Selection & Prioritization
- Thorough description of each countermeasure idea
- Selection method/tool

Step 9 Countermeasure Plan (Plan)
- Detailed plan for testing and implementing countermeasures
- Critical steps displayed on Gantt chart

Step 10 Countermeasure Testing (Do)
- Documentation of test (photos, check sheets, run test)
- Documentation of Associate feedback

Step 11 Countermeasure Verification (Check)
- Results of test compared to root cause verification
- Associate feedback analyzed

Step 12 Countermeasure Standardization (Act)
- Explanation of action taken
- Standardization method (updated docs, training records, etc.)
- Management Gate Review

Step 13 Comparison Summary
- Qualitative results in the form of pictures and documents
- Core data before and after graphs
- Before and after comparisons

Step 14 Impact Analysis
- Personal and Team Growth explained
- Cost Benefit analysis
- Horizontal deployment opportunities identified
- Final Management Review of finished presentation
Kaizen Title

Date:
Presenters:
Location:
## Step 1 - Team Development

| TEAM NAME: | ________________ | KAIZEN START DATE | ____________ |
| SPONSOR: | ________________ | KAIZEN END DATE: | ____________ |
| LEADER: | ________________ | MEETING LOCATION | ________________ |
| MEMBERS: | ________________ | CODE OF CONDUCT: (TEAM RULES) | ________________ |

Be creative when picking a team name. Example: If your favorite movie is *Ghost Rider* call your team *Ghost Riders*. 
**Step 2 – General Information**

Orient audience to project background

**Content Ideas**
- Picture of parts
- Picture of equipment, work area layout
- Overall Improvement Timeline w/ milestones
- Best practice implementation
- Customer requirements
- DCP information
Step 3 - Theme Selection - Business Case

As a team decide which Goal, Objective, Task, or Activity listed on the Business Plan is best supported by your kaizen.

Guiding Principles
- 1 Piece Flow
- Continuous Improvement
- Problem solving excellence

Company Direction

Lean Educated Workforce
Implement kaizen activities
50% WIP reduction by year end

Plant Direction

Cell Direction
Step 3 – Theme Selection

State the theme
Explain challenges
Show support data if available
### Step 4 - Activity Plan

<table>
<thead>
<tr>
<th>KAIZEN STEP</th>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Week 5</th>
<th>Week 6</th>
<th>Week 7</th>
<th>Week 8</th>
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<td>1 DEVELOP THE TEAM</td>
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<td>8 COUNTERMEASURE SELECTION &amp; PRIORITIZATION</td>
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<td>9 COUNTERMEASURE PLANNING (PLAN)</td>
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<td>10 COUNTERMEASURE TESTING (DO)</td>
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<td>13 DATA COMPARISON SUMMARY</td>
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<td>14 IMPROVEMENT ANALYSIS</td>
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</table>

**Plan**

**Actual**

Plan status: ![Plan status](image1)

Actual status: ![Actual status](image2)
Step 5 - Qualitative Data for Current Situation Analysis

Determine the best method for visually displaying the problem. Use Process flow, area layouts, part flow, photos, drawings, etc.
Step 5 - Quantitative Data for Current Situation Analysis

Collect data on the problem. Use pre-existing data whenever available. Develop check sheets if pre-existing data not available and develop the appropriate graph(s). Analyze the data to determine the core data.
Step 6 - Root Cause Analysis

Make a list of possible causes and check against actual situation. Strike through the causes which do not apply when reviewing the actual situation.
Step 6a – Root Cause Analysis

See root cause appendix for details
### Step 6b – Root Cause Identification

<table>
<thead>
<tr>
<th>Possible Root Cause</th>
<th>Investigation Method Needed to Verify</th>
<th>Who Will Investigate</th>
<th>When Will Investigation Be Done</th>
<th>Summarize Findings</th>
</tr>
</thead>
<tbody>
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</table>

Redline root causes not significant to your project

Use graph to highlight important information

Add extra slides as necessary
## Step 7 - Highest Priority Goal Setting

Set a SMART goal based on the data and display on a graph

<table>
<thead>
<tr>
<th>SPECIFIC</th>
<th>(goal in words)</th>
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</thead>
<tbody>
<tr>
<td>MEASURABLE</td>
<td>(how do I measure)</td>
</tr>
<tr>
<td>ATTAINABLE</td>
<td>(actual target)</td>
</tr>
<tr>
<td>RELEVANT</td>
<td>(why is it important)</td>
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<tr>
<td>TRACKABLE</td>
<td>(tracking tool and due date)</td>
</tr>
</tbody>
</table>

Replace this box with a graph showing the history of your process measureable, your SMART target, and the gap you will address.

Replace this box with predicted financial impact of improvement.

**NOTE:** It should be stated on this slide why you picked this target. The Why needs to have solid information to back it up. (i.e previous activities have yielded this type of return, or when reviewing the historical data we found the improvements considered could improve the metric by X% per activity. This illustrates your thought process, your project may not yield the exact results, but you can defend the targets you selected with data.
**Step 8 - Countermeasure Selection and Prioritization**

Plan to work on top 3 countermeasures. If you only use one then why/why needs to go deeper.

<table>
<thead>
<tr>
<th>Countermeasure</th>
<th>Ability for team to implement</th>
<th>Cost to Implement</th>
<th>Time to implement</th>
<th>Criteria</th>
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If your words cannot be easily read, then add a comment block to summarize data.
**Step 9 - Countermeasure Planning (PLAN)**

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<th>Task</th>
<th>Week</th>
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</table>
Step 10 - Countermeasure Testing (DO)

Description and documentation of the test. Team confirms that a countermeasure idea will work if implemented. Explain in detail, use multiple slides if necessary.
Step 11 - Countermeasure Verification (Check)

Check the quantitative results of the test by analyzing the information that was collected during the test. Know the gap between target and results
**Step 12 - Countermeasure Standardization (ACT)**

Determine action based on results from check phase (document)
If no gap go to next step, if you have a gap, go back to root cause and recheck
### Step 13 - Qualitative Comparison Summary

<table>
<thead>
<tr>
<th>Countermeasure</th>
<th>Results</th>
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<tbody>
<tr>
<td>Before</td>
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<td>After</td>
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</table>
Step 13a - Quantitative Comparison Summary

Display goal plan vs. actual, compare before and after data. Use the same method as current state, such as same type of graph.
**Step 14 - Impact Analysis (Intangibles)**

Include what they learned, how kaizen makes their work easier, motivation for future kaizen opportunities, side benefits

<table>
<thead>
<tr>
<th>Kaizen Member</th>
<th>What Benefit Did I Get From Kaizen?</th>
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Team
Step 14a – Impact Analysis (Cost and Horizontal Deployment)
Thank you for your attention.

Any Questions?
Appendix A - Root Cause Analysis

What is this step? The team identifies likely causes to a problem or theme.

Why do we do this step? This step ensures all potential root cause(s) are identified.

A. Make a list of possible causes
   1. Write the problem at the top of a blank sheet of paper.
   2. Write the heading “Man” under the problem
   3. The team should brainstorm and list any position that could cause the problem
   4. Clarify what these people could do to contribute to the problem. (i.e. Install associate using wrong installation technique)
   5. Once the team is finished with “Man”, write the header “Method” and brainstorm by asking “What method are we using that can cause this problem?” Clarify by determining what it is about the method that could cause the problem. (i.e. Bolt tightening sequence does not allow tail light to set flush)
   6. Continue the exercise on through “Material” and “Machine”. These are the 4 Ms. All possible causes should fit under one of these categories; however, it is not necessary to have causes under all 4 categories if they do not apply.

B. Check the list against the actual situation. With list in hand:
   1. Go to the actual spot of the problem or theme.
   2. Look at the actual situation
   3. Check to make sure the team is being realistic about what might be going wrong.
* Strike those possible causes from the list which are not causes based on your team investigation

C. Break any broad goal, graphically, into increasing levels of causes to determine countermeasures
   1. Option 1: Create the Cause & Effect Diagram
      A. Draw the basic Cause & Effect Diagram (Fishbone). Write the problem in the box. Each category is represented by a line with an arrow or a bone. Each bone points to the problem.
Appendix A - Root Cause Analysis

1. Create Cause & Effect Diagram (cont’d)
   B. Place the remaining possible causes from your list under the assigned category on the diagram. Draw a line under each cause with an arrow pointing to the category “bone”.

C. For each possible cause, ask “What could cause this?”
D. Write the answer below the possible cause.

E. Ask, “Could anything else cause this?”
F. Continue for each possible cause. “What could cause this?”, and “Could anything else cause this?”

NOTE: It is difficult to know when to stop on a Cause & Effect Diagram. There are a couple of guidelines a team can use to help understand when to stop.

   1. The lowest level of cause that the team can countermeasure
   2. When common sense dictates an end to the line of questioning.
Appendix A - Root Cause Analysis

1. Create Cause & Effect Diagram (cont’d)
   G. Confirm each line of questioning by asking, “Could this really cause that?”
   H. Start at the possible root cause on each line of questioning and work back to the problem.

Note: Try to identify leaps in logic where it doesn’t seem to make sense. If the team cannot answer yes to the question “Could this really cause that?” then the line of questioning is not correct.
Appendix A - Root Cause Analysis

2. Option 2: Create a Why Tree:
   A. Develop a statement of the goal, project, plan, problem or whatever is being studied. Write it at the far left of the tree.
   B. Ask a question that will lead you to the next level of detail. “What causes this?” or “Why does this happen?”
   C. Brainstorm all possible answers. Write each idea to the right of the first statement. Show links between the tiers with lines or arrows.
      - Each of the new idea statements now becomes the problem statement. For each one, ask the question again to uncover the next level of detail. Create another tier of statements and show the relationships to the previous tier of ideas with arrows. Do a “necessary and sufficient check” for each set of items.
      - Continue to turn each new idea into a subject statement and ask the question. Do not stop until you reach the fundamental root causes.
Appendix A - Root Cause Analysis

2. Option 2: Create a Why Tree (cont’d)

D. Do a “necessary and sufficient” check of the entire diagram. Are all the items necessary for the objective? If all the items were present or accomplished, would they be sufficient for the objective?

E. Do a “necessary and sufficient” check. Are all the items at this level necessary for the one on the level above? If all the items at this level were present or accomplished, would they be sufficient for the one on the level above?

F. Use the “Therefore” method to test your chain of “whys”. The (current Why) exists therefore, the previous Why exists.

- Some points to keep in mind:
  - State causes, not solutions.
  - Take note of causes that appear repeatedly.
  - Review each major cause category. Circle the most likely causes on the diagram.
  - Test the most likely cause and verify with data.
Appendix B - Data Collection Flow Chart

1. Can the problem be broken down into smaller problems?
   - Yes: Develop a pie chart or bar graph to compare
   - No: Sometimes data cannot be broken down into smaller problems.

2. Can the biggest/most be broken down by 'When' or 'Where''
   - Yes: Develop a pie chart or bar graph to compare
   - No: Sometimes data cannot be broken down by 'When' or 'Where'

Focus on the biggest / most

This is the CORE Data

3. Does the CORE data vary from day to day, week to week?
   - Yes: Analyze variances over time (trend analysis)
   - No: Identify the Comparison Time Frame

4. Set a goal based on the results of the analysis