



CROSSLANE ADVISORS CONSULTING GROUP

Process Screening & Diagnostic Intake Form: Lean Evaluation & Prioritization

Document Version: 1.0

Purpose: Preliminary assessment tool for evaluating candidate processes for Lean diagnostic intervention, Value Stream Mapping (VSM), and Kaizen prioritization.

SECTION 1: GENERAL METADATA & ENGAGEMENT OVERVIEW

- **Organization / Client Name:** Person
- **Business Unit / Division:**
- **Facility / Location:** Place
- **Process Owner / Executive Sponsor:** Person
- **Form Completed By:** Person
- **Date of Submission:** Date

SECTION 2: PROCESS PROFILE & BOUNDARIES

1. **Process Name / Identifier:**

2. **Process Boundaries:**
 - **Trigger / Start Point (Supplier / Input):**
 - **Endpoint / Output (Customer / Deliverable):**
3. **Core Function:**
 - ☐ Manufacturing / Production Assembly
 - ☐ Warehousing / Logistics / Fulfillment
 - ☐ Administrative / Transactional (e.g., Procurement, Billing)
 - ☐ Maintenance, Repair & Operations (MRO)
 - ☐ Customer Service / Technical Support
4. **Product / Service Family Associated:**

SECTION 3: QUANTITATIVE OPERATIONAL METRICS (BASELINE DATA)

Metric	Current Estimate	Target / Benchmark	Data Source / Confidence
Total Lead Time (Order to Delivery)			
Process Cycle Time (Touch Time)			
Work-in-Progress (WIP) Level			
First Pass Yield / Quality Rate (%)			
Scrap / Rework Cost per Month (\$)			
Customer On-Time Delivery (OTD %)			
Operating Headcount (FTEs)			

SECTION 4: LEAN WASTE (MUDA) PRELIMINARY ASSESSMENT

Rate the severity of observed waste on a scale of 1 to 5 (1 = Minimal / No Issue, 5 = Severe / Critical Bottleneck).

1. **Overproduction:** Producing faster or in larger batches than downstream demand.
[1] [2] [3] [4] [5] — Notes: _____
2. **Waiting / Delays:** Idle time due to material shortages, approvals, or machine downtime.
[1] [2] [3] [4] [5] — Notes: _____
3. **Unnecessary Transport:** Excessive physical movement of WIP or documentation.
[1] [2] [3] [4] [5] — Notes: _____
4. **Over-Processing:** Extra steps, redundant approvals, or non-value-added inspections.
[1] [2] [3] [4] [5] — Notes: _____
5. **Excess Inventory:** Stagnant raw materials, buffer inventory, or backlog queues.
[1] [2] [3] [4] [5] — Notes: _____
6. **Unnecessary Motion:** Ergonomic inefficiency, poor layout, or searching for tools/files.
[1] [2] [3] [4] [5] — Notes: _____
7. **Defects / Rework:** Error correction, customer returns, or scrap generation.
[1] [2] [3] [4] [5] — Notes: _____

SECTION 5: STRATEGIC & CULTURAL ALIGNMENT

1. **Customer Impact (Voice of Customer):**
Does this process directly affect customer delivery commitments, product quality, or customer satisfaction scores?
[] Critical Touchpoint [] High Downstream Impact [] Moderate / Indirect [] Low Impact
2. **Financial / Strategic Priority:**
Is this process tied to key strategic goals or major revenue streams (e.g., top 20% high-margin products)?
[] Core Driver [] Supporting Value Stream [] Secondary / Non-Core
3. **Team Readiness & Culture:**
How receptive is the operational team to Gemba observations, standardized work, and rapid continuous improvement?
[] Highly Enthusiastic [] Open / Receptive [] Cautious / Skeptical [] Resistant
4. **Safety & Compliance Risks:**
Are there ergonomic, physical safety, or regulatory compliance risks in this process?
[] Severe Risk [] Moderate Risk [] Minimal Risk

SECTION 6: CROSSLANE ADVISORS EVALUATION MATRIX SCORECARD

(To be completed by Crosslane Advisors Lead Consultant)

Evaluation Criteria	Weight	Score (1-10)	Weighted Value
Customer Value & Lead Time Impact	30%		
Financial / Waste Reduction Potential	25%		
Strategic Alignment (80/20 Rule)	25%		
Implementation Feasibility & Readiness	20%		
TOTAL COMPOSITE PRIORITIZATION SCORE	100%		____ / 10.0

- Recommendation & Next Steps:**
- [] **Priority 1:** Immediate Rapid Improvement Event (Kaizen / Quick Win)
 - [] **Priority 2:** Detailed Value Stream Mapping (VSM) Diagnostic
 - [] **Priority 3:** Local Standardized Work / 5S Implementation
 - [] **Deferred:** Low Impact / High Effort — Exclude from current Lean phase

Assigned Advisory Lead:

Target Diagnostic Date: