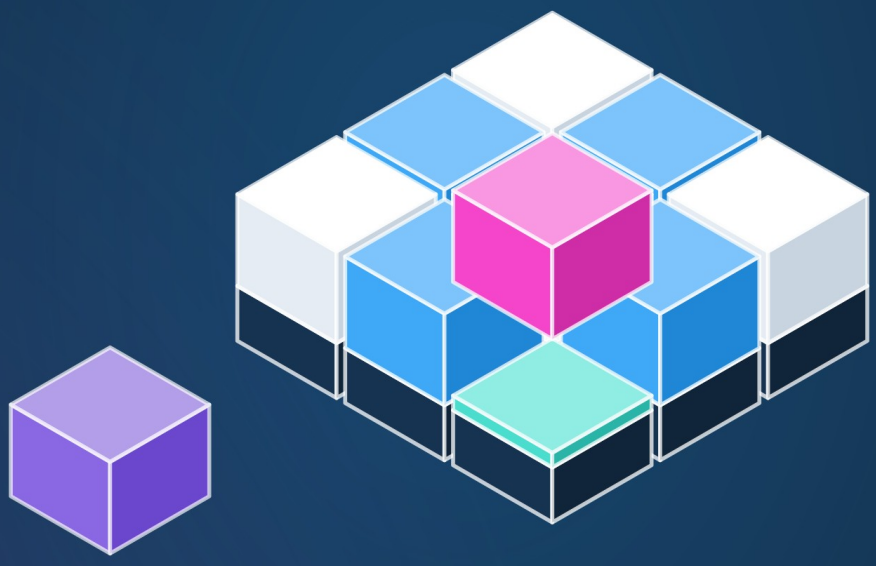
OPERATIONS INSIDER

LEAN · OPERATIONS · LEADERSHIP

ENGINEERING CHANGE AND PART APPROVAL QUICK START CHECKLIST

Score your change process in one hour, with records you can point at.



REQUEST. EVALUATE. DECIDE. INTRODUCE.

START HERE

How to Use This Check

One plant or one product family, one hour with engineering, quality and planning, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Open the real records: the change register, the last five closed changes with their documents, the stock list of replaced parts and the last sample reports.	Score each statement from 0 to 4. Without a register, a record or a report you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across products or departments.
3	Mostly in place and visible in the records.
4	Consistently in place, visible, reviewed and improved.

> **WHY CHANGE CONTROL**
>
> **A change that is introduced without evaluation leaves old parts in the warehouse, old drawings at the machine and unapproved parts at the customer. Each of these costs more than the hour the evaluation would have taken.**

Before You Start

- **Scope:** one plant or one product family with at least twenty changes per year.
- **Evidence:** the register, five closed changes followed from request to shop floor, and the write-offs after changes.
- **Tone:** you check the system, not the engineers. Ask where a change waited, not who was slow.

THE CHECK

01 Request and Classification

NO.	CHECK	SCORE 0 TO 4
01	A written definition says what counts as an engineering change, and every change to a part, document, process or source starts with a numbered request.	
02	Every request names the reason, the affected parts and the expected benefit before anyone starts to work on the solution.	
03	Changes are sorted into classes by their effect on form, fit, function and the customer, and the class decides the path.	
04	A rule says when a changed part gets a new part number and when a new revision is enough, and it is applied the same way by everyone.	
05	All requests are in one register with owner, class, status and dates, and the register is complete.	

02 Evaluation and Decision

NO.	CHECK	SCORE 0 TO 4
06	Every request is evaluated for cost, date, stock, tools, documents and customer before the decision.	
07	One-time cost and yearly effect are stated in EUR for every change above an agreed threshold.	
08	A change board with engineering, quality, production, purchasing, logistics and sales meets every week and decides with a record.	
09	Requests are decided within ten working days, and the share decided at the first presentation is known.	
10	Rush changes that skip the evaluation are counted, need a named approver and are evaluated afterward.	

THE CHECK

03 Effectivity and Stock

NO.	CHECK	SCORE 0 TO 4
11	Every approved change has one effectivity rule: a fixed date, a serial number or a defined run-out of the old parts.	
12	Stock and open orders of the old parts are counted on the day of the decision and valued in EUR.	
13	Purchasing and planning stop or reduce orders for old parts on the day of the decision, not when the new parts arrive.	
14	Residual stock has a decision before the effective date: use up, rework, keep for service or scrap.	
15	The first product built with the new parts is recorded by date and serial number, so that every delivery can be traced to its revision.	

04 Documents and Part Approval

NO.	CHECK	SCORE 0 TO 4
16	A list per change names every affected document and master data record with owner and due date.	
17	Bill of material, routing, work instructions, inspection plans and planning parameters switch on the effective date.	
18	Old document versions are removed from the stations on the effective date and the removal is checked.	
19	Changed parts are approved with measured samples from the real process and tool before the first delivery in series.	
20	The scope of the approval evidence follows a written rule and is agreed with the customer where the contract requires it.	

THE CHECK

05 Process, Supplier and Key Figures

NO.	CHECK	SCORE 0 TO 4
21	A written list says which process changes need a request and an approval, also when the drawing does not change.	
22	Suppliers are bound by agreement to announce changes to tools, sites, sources and processes before they introduce them.	
23	Unannounced supplier and process changes are recorded with their cost and followed up with the supplier.	
24	Lead time per change, open changes and the share of rush changes are measured every month and have targets.	
25	A change is closed only when documents, master data, stock and approval are complete, and closed changes are audited by sample.	

Your Result

BLOCK	POINTS	OUT OF
01 Request and Classification		20
02 Evaluation and Decision		20
03 Effectivity and Stock		20
04 Documents and Part Approval		20
05 Process, Supplier and Key Figures		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your change process is routine and how much is rescue. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Informal. Changes happen by email and phone, nobody knows how many are open.	Define what a change is. Put every change into one register.
40 to 59	Recorded. Requests and numbers exist, but evaluation and effectivity depend on the person.	Evaluate every request in six dimensions. Start the weekly board.
60 to 79	Controlled. Board, effective dates and document lists work for most changes.	Add part approval rules, supplier changes and the key figures.
80 to 100	Routine. Changes are fast, complete and traceable.	Hold the level. Cut the lead time per class further.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after three months and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
STARTER KIT	The guide for the first 30 days with definition, request, evaluation, board and register, plus the change register in Excel.
EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, six templates, the Excel system and a workshop deck. Both at operationsinsider.com.