OPERATIONS INSIDER

LEAN · OPERATIONS · LEADERSHIP

THE MANAGER'S LEAN ADMINISTRATION QUICK START CHECKLIST

Score one office process in twenty minutes, with evidence you can open.



FOLLOW THE CASE. NOT THE ORG CHART.

START HERE

How to Use This Check

One office process, one real case, the people who do the work. Twenty minutes, twenty-five statements, one number.

01 FOLLOW	02 SCORE	03 ACT
Take one case that was finished last week and follow it through the team with the people who handled it. Do not score from a meeting room.	Score each statement from 0 to 4. Without something you can open or 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 the team.
3	Mostly in place and visible in the team.
4	Consistently in place, visible, reviewed and improved.

> **WHY ONE PROCESS**
>
> **A department does not have a lean level. A process does. Score the process that customers complain about most and repeat the check there every quarter.**

Before You Start

- **Process:** choose one with volume and pain: orders, invoices, quotations, requests, claims, onboarding.
- **Evidence:** the board, the ticket system, the shared drive, the template. If nobody can open it, it does not count.
- **Respect:** you check the process, not the people. Say so before you start, and keep personal data out of your notes.

THE CHECK

01 Flow and Waste

NO.	CHECK	SCORE 0 TO 4
01	The process is mapped from trigger to result, with touch time and waiting time per step, measured on real cases.	
02	Every handoff between people or teams is counted, and each one has a stated reason to exist.	
03	Waiting times are taken from at least twenty real cases or system timestamps, not from estimates.	
04	The three largest wastes of the process are known by name, with hours per month and an owner.	
05	Lead time and flow efficiency of the last month are visible on the team board.	

02 Standard Work and First Time Right

NO.	CHECK	SCORE 0 TO 4
06	Recurring tasks have a written standard with inputs, steps, checks and a definition of done.	
07	A new team member completes a standard task from the written standard without asking a colleague.	
08	Incoming requests are checked against a written input checklist, and the share returned as incomplete is measured.	
09	First time right is measured for the main outputs, with a written definition of what counts as an error.	
10	Every recurring error type has a countermeasure built into the standard, the template or the system.	

THE CHECK

03 Digital and Physical Workplace

NO.	CHECK	SCORE 0 TO 4
11	Shared drives follow one folder structure with four levels at most and a named owner per top folder.	
12	Files follow a written naming rule, and a sample of twenty recent files shows at least 90 percent compliance.	
13	Retention rules state how long each document type is kept and where, and old versions are archived on schedule.	
14	Any team member finds the current version of a template or procedure within one minute.	
15	Shared desks, cabinets, meeting rooms and supplies have a fixed place and a visible minimum stock.	

04 Visual Management and Flow Control

NO.	CHECK	SCORE 0 TO 4
16	The team has one board, physical or digital, that shows all open work by status and is updated daily.	
17	Work in progress limits are set per step, and the team finishes work before it starts new work when a limit is reached.	
18	Every work item shows the date received and the date due, and items past their age limit stand out at a glance.	
19	Approval levels with value limits are written down, and no item waits more than two working days for an approval.	
20	The team holds a stand-up of fifteen minutes or less at the board with a fixed agenda.	

THE CHECK

05 Performance, Hybrid Work and Governance

NO.	CHECK	SCORE 0 TO 4
21	Lead time, backlog, first time right and on-time answers are reported weekly from written definitions.	
22	Service levels for the main customers of the team are written, agreed and reported against.	
23	Written rules for meetings, availability and handover exist for hybrid work and are reviewed every quarter.	
24	Automation is applied only to standardised, stable steps, and every automation has an owner and a written rule.	
25	The leader reviews the process at the board every week and follows one real case from start to end each month.	

Your Result

BLOCK	POINTS	OUT OF
01 Flow and Waste		20
02 Standard Work and First Time Right		20
03 Digital and Physical Workplace		20
04 Visual Management and Flow Control		20
05 Performance, Hybrid Work and Governance		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you where the process stands. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Invisible. Work sits in inboxes and nobody knows the lead time.	Follow twenty cases and measure touch and waiting time. Put all open work on one board.
40 to 59	Known. The process is mapped but runs differently per person.	Write the standard and the input checklist. Measure first time right.
60 to 79	Stable. Work flows against limits and is measured every week.	Cut approval layers and handoffs. Set work in progress limits and service levels.
80 to 100	Lean. Errors are prevented and the lead time keeps falling.	Hold the level. Automate stable steps. Transfer the method to the next process.

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 on the same process in 90 days and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
LEAN ADMINISTRATION STARTER KIT	The guide for your first 30 days on one office process, plus the office process tracker in Excel.
LEAN ADMINISTRATION EXCELLENCE BUNDLE	The full playbook, workshop pack, office forms, the Excel system and a ready-to-use workshop deck.

Both are available at operationsinsider.com.