

CD INSTRUCTIONS FOR USE

The CD included at the back of the book contains a file—Kaizen Event Tools—that contains practical tools and standard work templates to help you plan and execute successful Kaizen Events and perform necessary follow-up activities. In addition, the CD includes a folder containing several full-size versions of the graphics that appear in the book. This material is included in case you want to print them to take notes as you read the book and/or use them for training purposes.

The CD files are:

- **Kaizen Event Tools**—Excel 2003.xls
- **Kaizen Event Tools**—Excel 2007.xls
- **Additional Materials Folder**, which includes:
 - **CD Instructions for Use**—This file is an electronic copy of the instructions below.
 - **Certificate of Achievement**—This certificate, referred to in Chapter 17, can be modified for your organization and either printed as is or the borders can be removed and you can print on certificate paper available through any office supply store or specialty company such as Baudville, www.baudville.com.
 - **Kaizen Commandments**—These “rules of engagement,” which are discussed in Chapter 11, help ensure a successful event. You may want to distribute these rules to the kaizen team and/or post them in kaizen central.
 - **Key Mapping Metrics**—This table, introduced in Chapter 12, lists the most common mapping metrics used to measure the current state and predict future-state performance for either macro-level value stream maps or micro-level process maps.
 - **Lean Terminology**—This reference guide, which appears as appendix A in the book, includes the most commonly used lean terms and acronyms.
 - **Value Stream Maps**—This file contains the sample value stream maps described in Chapter 1. You may want to print these to refer to as you read Chapter 1.

KAIZEN EVENT TOOLS—GENERAL INFORMATION

These interactive Excel-based tools, which provide standard work for planning and executing Kaizen Events, form the backbone of this book. Detailed instructions and best practices for using the tools are described throughout the book. The matrix on the following page lists the tools, their tab numbers on the Excel file, the Kaizen Event phase in which they will likely be used, and the chapter(s) in the book in which the tool’s use is first introduced:

File Type and File Naming Conventions

The CD includes two versions of the Kaizen Event Tools file—one for Microsoft Excel 2003 users (Kaizen Event Tools—Excel 2003.xls) and one for Microsoft Excel 2007 users (Kaizen

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Kaizen Event Phase	Tab	Tool	Chapter
Pre-Event Planning	1	Kaizen Event Charter	Chapters 3–8
	2	Planning Checklist	Chapter 3
	3	Team Formation Matrix	Chapter 6
	4	Supplies Checklist	Chapter 7
	5	Communication Worksheet	Chapter 8
Event Execution	6	Execution Checklist	Chapter 10
	7	Improvement Ideas	Chapter 10
	8	Sustainability Plan	Chapter 17
	9	30-Day List	Chapter 17
	10	Parking Lot List	Chapter 17
	11	Kaizen Event Report	Chapter 17
	12	Final Presentation Agenda	Chapter 17
Post-Event Follow-up	13	Post-Event Activities	Chapter 18
	14	30-Day Audit Report	Chapter 18
	15	60-Day Audit Report	Chapter 18

Event Tools—Excel 2007.xlsm). To ensure proper functioning, use the file that corresponds to your version of Excel. Excel 2007 users who use the Excel 2003 file may experience file size expansion to 40 MB or more. If you are using Excel 2007, use the MBPM 2007.xlsm file to avoid this problem. The Excel tools are an integral part of this book and serve as the standard work for planning and executing successful Kaizen Events, and laying the groundwork for improvement sustainability. We recommend that you store the master files in a safe and accessible place, such as a shared drive. You may want to create a master folder to house all information related to Kaizen Events, with subfolders for each event.

For each Kaizen Event, you can perform the “save as” function and give the tools a unique file name for that event. We recommend you include the event name and start date (e.g., Accounts Receivable 2007-08-15) in the file name.

Macros

The tools contain several macros, which must be enabled for proper functioning. The version of Excel you are using and your security settings will determine how to evaluate if macros are enabled. In Excel 2003, the macro settings can be adjusted using the Excel toolbar by selecting Tools > Options > Security > Macro Security. To change the macro settings in Excel 2007, click the Microsoft Office button and then select Excel Options > Trust Center > Trust Center Settings > Macro Settings.

Because of the macros, when you exit the tool you will be asked whether you want to save changes, *even if you haven't made any changes*. If you have made changes and want to save them, select “yes.” If you have not made any changes to the file, or have made changes that you do not wish to save, select “no.”

Tools Organization

The file, which Excel refers to as a workbook, contains 15 different standard work tools/templates, which Excel refers to as “sheets.” You can access each sheet by clicking the appropriate tab along the bottom of the Excel workspace. The tabs are color-coded according to the Kaizen Event phase in which the tools are typically used:

Tab Color	Phase
Blue	Pre-event planning
Yellow	Event execution
Lavender	Post-event follow-up

KAIZEN EVENT TOOLS: NAVIGATION TIPS

While detailed information about each specific tool's use can be found within the book's chapters, the following navigation instructions provide general information about the tool structure and function. The instructions for use are not intended as Excel training. Rather, the instructions assume users possess a basic understanding of Excel.

Cell Color Coding

All cells are color coded to indicate the cell's format, functionality, and what action, if any, the user should take:

Cell Color	Action
Yellow	Cells that are color-coded yellow are unlocked to accept user data entry. On those tools containing pre-populated lists, we have included blank yellow cells so you can add activities or items that are unique to your organization (e.g., cells C14 –C17 in the “Planning Checklist” sheet).
White	White cells contain descriptions of activities or items in a list and are “locked” to prevent inadvertent deletions, formula revisions, or cell reformatting.
Black or gray	These cells contain section, column, or row labels and are also locked, preventing alteration.
Salmon/tan	For user ease, salmon-colored cells are auto-populated from other cells within the workbook. For example, once the top three sections of the Kaizen Event Charter are completed, all corresponding cells, on the subsequent tools, auto-populate with the information entered into the charter cells. If you need to update the information in any of the tools' fields that drive from the charter, you'll need to modify the information in the charter first as it's the driving document. Metrics-related salmon-colored cells auto-populate based on programmed formulas that auto-calculate once data is entered into the driving yellow cells. The salmon cells are also locked. If the source cell information is altered, the salmon cells will update automatically. More detailed information about this feature is included in the auto-populate section.

Cell Content

When more content is entered than the cell's size allows, one of two things happen, depending on the format of the particular tool: 1) the font size automatically shrinks to accommodate additional text, or 2) the text wraps within the cell. Cells are limited in size to encourage concise communication. When possible, we opted for the "text wrap" feature. If text wrapping would alter form layout, we used the "shrink to fit" feature. In this case, the font will be reduced to the size necessary to fit all text into the space available. Again, we encourage brevity but not at the expense of clarity.

If you want to create a list within a single cell, such as the Boundaries and Limitations cell (C11) on the Kaizen Event Charter (Tab 1), press alt + enter after each item to move to a new "line" within the cell.

Insert Comment

Any time you need to explain a *yellow* cell's contents further, you may insert a comment by right clicking on the cell. A small red triangle appears in the upper right corner of the cell to indicate a comment exists. To view the comment, simply left click on the cell (making it "active") and the comment will appear. To delete the comment, right click in the cell and select "delete comment." You may also insert and delete comments from the menu bar by selecting "insert," then select "comment."

Check Boxes and Progress Boxes

Place the cursor over the check box and left click once to check the boxes that appear on several of the tools containing lists. To remove the checkmark, simply left click again.

On the 30-Day List's progress section, if you delete the number on the progress box quadrant that indicates the appropriate degree of completion for the particular task, the quadrant color will change from yellow to green. You may delete the cell contents by left clicking the cell to make it active and pressing the "delete" key or right clicking in a cell and selecting "clear contents." To change the color back to yellow, enter the corresponding value (1, 2, 3, or 4).

Footers

Each tool includes a footer that contains up to three pieces of information. The file name and the tool's tab number appear in the left position of the footer. For tools with multiple hard copy pages, the page numbers appear in the center position. If you print the Planning Checklist, page numbers will appear as "Page 1 of 4," "Page 2 of 4," etc. If you print a one-page tool, the printed copy will not include a page number.

If you select "entire workbook" before printing, the hard copy will be paginated sequentially: "Page X of 26." The entire workbook is 26 pages. Footers are protected and may not be altered. Please note that the Excel print option defaults to "active sheet," so if you want to print the entire workbook (entire set of tools), you need to highlight all of the tabs or select "entire workbook" before printing.

The right position of the footer includes a copyright: © 2007 Karen Martin and Mike Osterling. All rights reserved.

Protection

All sheets are protected. In addition, all cells with the exception of yellow cells have been locked to prevent alteration. Yellow cells—intended to be filled in by the user—are “unlocked” and color coded yellow. This formatting restriction is intentional, designed to prevent you from inadvertently deleting key information, creating inoperable formulas or reformatting the cells.

Auto-Populate Feature

Certain cells on the various tools serve as source cells that, when data is entered, automatically populate corresponding cells on the same or subsequent tools. Cells that receive this automatic population are color coded salmon (Excel refers to this color as tan). For example, once the executive sponsor’s name is entered into cell H3 on the Kaizen Event Charter, it will automatically populate the Executive Sponsor cell on the Planning Checklist, 30-Day List, and all other sheets that include the executive sponsor’s name. Another example is when the Event Start Date is entered into cell F4 on the Planning Checklist, the “Due Dates” in column D auto-populate, based on a calculation that includes the Event Start Date and the suggested timing for that activity (four weeks prior to the Kaizen Event, three weeks prior, etc.).

Metrics-based examples appear on the Event Report, and the 30- and 60-Day Audit Reports, in which formulas automatically calculate the projected change and percentage of action items completed. In addition, metrics information entered in the event report auto-populate the corresponding cells on the audit reports.

Insert Pictures

When completing the event report sheet, you will notice two sections where you may insert graphs, charts, or pictures. Since this sheet is protected (as are all of the sheets), pictures cannot be inserted using typical Excel commands. To insert pictures, an “insert picture” feature has been added. To use this feature, click the “insert picture” button. After selecting the desired picture file, a pop-up message will appear prompting you to select the cell into which you’ll insert the picture—simply type in the cell address (e.g., L7) or click on the desired cell. The picture will auto-size to fit within the selected cell. To enlarge or shrink the image, you may use the standard picture editing commands (e.g., crop and rotate).

Kaizen Event Tools Licensing Information

The Kaizen Event Tools file is licensed for a single user. Separate copies of “The Kaizen Event Planner” must be purchased for anyone who enters data into or edits the file. No purchase is required for users who only view the file contents.

When the Kaizen Event Tools file is opened for the first time, a pop-up box will appear containing an End User License Agreement (EULA), which specifies the terms and conditions of this license. If you prefer not to see the pop-up box each time the file is opened, you may check the box “Do not show license message at start-up” and “Agree.” You may view the EULA at any time by clicking the “License Agreement” button in the top right corner of the Kaizen Event Charter (Tab 1).

If you are distributing the file for viewing purposes, the pop-up box containing the EULA should be activated so the recipients understand the terms and conditions of the license. To reactivate the EULA pop-up, click on the “License Agreement” button in the top right corner of the Kaizen Event Charter (Tab 1) and uncheck the “Do not show license at start up” box.