

Project Classification Worksheet

This tool is used to evaluate the characteristics of a potential process improvement and assist employees in determining the appropriate resource and sponsorship levels. Completion of this exercise is **required** prior to an FC Lean project facilitation, and for entry into the Lean Leaders course.

Complexity:

| | | | | | |
|------------------|--|---|---|--|---|
| Type of Change | <i>Simple</i> | | | <i>Complex</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| Perceived Need | <i>Need for change is visible; current state is non-satisfactory</i> | | | <i>Employees do not see change as necessary; current state is satisfactory</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| Resources Needed | <i>Project does not require significant staff time/money</i> | | | <i>Project requires significant staff time/money</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| Timeframe | <i>Really quick, or very long</i> | | | <i>A few months</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| Change Capacity | <i>Team is not currently engaged in many changes</i> | | | <i>Team is currently experiencing a lot of changes</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| | | | | TOTAL (out of 25) | |

Magnitude:

| | | | | | |
|-------------------------|---|------------------|-------------------|---|------------------|
| Scope | <i>Individual</i> | <i>Work Team</i> | <i>Department</i> | <i>Service Area</i> | <i>City-Wide</i> |
| | 1 | 2 | 3 | 4 | 5 |
| # of Employees Impacted | <i>Less than 10</i> | | | <i>Over 1,000</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| Structure Changes | <i>No change in organizational structure</i> | | | <i>Complete overhaul of organizational structure</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| Lean Knowledge | <i>Employees have high process improvement competency</i> | | | <i>Employees have no process improvement competency</i> | |
| | 1 | 2 | 3 | 4 | 5 |
| | <i>All employees impacted the same</i> | | | <i>All employees impacted differently</i> | |

| | | | | | |
|-------------------|---|---|---|---|---|
| Equity of Impact | 1 | 2 | 3 | 4 | 5 |
| TOTAL (out of 25) | | | | | |

Plotting Your Project:

Once you’ve answered the project classification questionnaire, you will have all the information needed to plot your project on the matrix below. This tool is used to identify the continuous improvement tools needed, as well as the level of sponsorship that will enable project success.

