**LeanPlus Assignment Guidelines & Reports for the Consultant**

# ****1. Assignment Methodology****

1. Prior to commencement it is advisable for the consultant to contact the Company’s IDA Ireland Project Executive through the TTI Team for company history, current business plans and eligibility for grant aid.
2. The consultant will inform IDA of any issue which might affect the progress or outcome of the agreed project.
3. Assignments must follow the project work programme laid out in the approved LeanPlus project application.

# Day 1 to 3: Key Engagements

* Meet and engage with the CEO/GM in company.
* Confirm understanding of Lean principles, tools, and process mapping.
* Scope out the commitment required from the company.
* Review cost competitiveness issues (commercial, financial and performance).
* Agree key projects and cost reduction potential.
* Agree a schedule for implementation and the support required
* Engage with the LeanPlus Champion.
* Progress the Company Lean Team building.

# Day 4 to Completion: Consultant and Company will

* Review and evaluate objectives relative to schedule agreed.
* Continue the Company Lean Team building.
* Agree resources, actions, and targets / facilitate team efforts.
* Train key personnel in Lean tools and methodology.
* Progress targets and objectives.
* Agree final targets and objectives for project end.
* Quantify results from project against stated objectives.
* Review the effectiveness of the Lean learning - has it been embedded?
* Establish a continuous improvement programme.
* Agree next steps for future potential projects.

# Reports Required:

* **Day 3 Report (Appendix 1)**
* **Interim Report (Appendix 2)**
* **Final Report (Appendix 3)**
* **Case Study (Appendix 4)**
* **Targets Achieved (Appendix 5)**

Reports are to be signed off by the Company and the Consultant, it is sufficient for the company to submit the consultant’s reports by email, it will be taken as read/signed off. For ease of processing submit reports in word format to the Project Executive in IDA.

**It is essential** **to submit the required reports as soon as possible.** This will ensure continued compliance with the LeanPlus Offer and will allow engagement with the Project Executive to address any issues. Resolving issues and addressing any deviations from the original objectives as they arise will avoid any complications at the grant claim stage.

**Feedback required:** A post project presentation is to be made to the company and where appropriate to relevant IDA staff.

# 2. Assignment Costs and Duration

* A LeanPlus project will typically be no less than six months in duration.
* Lean (& specialist) training fees up to a max of €900 per day (inclusive of expenses).
* Total project cost up to €60k, maximum IDA grant up to 50%.
* The cost of the company Lean Champion must not exceed the external trainer to a maximum of €20k, whichever is the lesser amount.
* It is the responsibility of the company to claim the LeanPlus funding support.
* The company is responsible for the payment of the consultant’s fee.

# Appendix 1

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| **LeanPlus - Day 3 Report Template** | |
| **Company Name** | Click or tap here to enter text. |
| **Company Contact** | Click or tap here to enter text. |
| **Date of 1st day of Project** | Click or tap to enter a date. |
| **Is the company commitment in place to complete the project within the agreed schedule?** | Click or tap here to enter text. |
| **What are the performance improvement issues?** | Click or tap here to enter text. |
| **What are the agreed performance improvement targets?** | Click or tap here to enter text. |
| **Provide details of the training plan** | Click or tap here to enter text. |
| **Confirm availability and the commitment of the LeanPlus Project Champion** | Click or tap here to enter text. |
| **What project milestones have been agreed with client in addition to the Day 3, Interim and Final Reports for IDA?** | Click or tap here to enter text. |
| **Other comment(s)** | Click or tap here to enter text. |
| **Signed by Company Contact** | Click or tap here to enter text. |
| **Date** | Click or tap to enter a date. |
| **Signed by Consultant** | Click or tap here to enter text. |
| **Date** | Click or tap to enter a date. |

# Appendix 2

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| **LeanPlus – ‘Interim Report’ Template** | |
| **Company Name** | Click or tap here to enter text. |
| **Reconfirm/discuss company & LeanPlus Champion commitment** | Click or tap here to enter text. |
| **Interim Report Date** | Click or tap here to enter text. |
| **Is the cross-organisational team functioning well?** | Click or tap here to enter text. |
| **Has the project deviated from its original objectives? If so, explain.** | Click or tap here to enter text. |
| **Is the project proceeding according to schedule? If any deviations, explain.** | Click or tap here to enter text. |
| **Are the agreed targets on course to being realised? Explain if changed.** | Click or tap here to enter text. |
| **What project milestones have been achieved to date?** | Click or tap here to enter text. |
| **Other comment(s)** | Click or tap here to enter text. |
| **Signed by Company Contact** | Click or tap here to enter text. |
| **Date** | Click or tap to enter a date. |
| **Signed by Consultant** | Click or tap here to enter text. |
| **Date** | Click or tap to enter a date. |

# Appendix 3

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| **LeanPlus – ‘Final Report’ Template** | |
| **Company Name** | Click or tap here to enter text. |
| **Reconfirm/discuss company & LeanPlus Champion commitment** | Click or tap here to enter text. |
| **Project Completion Date** | Click or tap to enter a date. |
| **Summary of performance improvement issues addressed** | Click or tap here to enter text. |
| **Summary of training on Lean business practice given to staff** | Click or tap here to enter text. |
| **Was there a continuous improvement team established?** | Click or tap here to enter text. |
| **Was a presentation given by Consultant to client and relevant IDA staff?** | Click or tap here to enter text. |
| **What further actions were agreed?** | Click or tap here to enter text. |
| **Permission for IDA to upload your Case Study to our website?** | Choose an item. |
| **Other comment(s)** | Click or tap here to enter text. |
| **Signed by Company Contact** | Click or tap here to enter text. |
| **Date** | Click or tap to enter a date. |
| **Signed by Consultant** | Click or tap here to enter text. |
| **Date** | Click or tap to enter a date. |

# Appendix 4

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| **LeanPlus Case Study** | |
| **Company Name** | Click or tap here to enter text. |
| **Address** | Click or tap here to enter text. |
| **Website** | Click or tap here to enter text. |
| **What we do – Location & Products** | Click or tap here to enter text. |
| **Project Objectives** | Click or tap here to enter text. |
| **Key Challenges** | Click or tap here to enter text. |
| **Key Changes** | Click or tap here to enter text. |
| **Results/Outcomes** | Click or tap here to enter text. |
| **Company Quote** | Click or tap here to enter text. |

# Appendix 5

**LeanPlus Project Impact Metrics**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Projected Cost Savings** | | | | **Projected Output Increase** | | | | **Continuous Improvement** | | |
| **Annualised Cost Savings** | **Cost Savings as a % of Sales** | **Cost Savings as a % of COGS** | **Notes** | **% Output Capacity Increase** | **Other project benefits (e.g. defects, lead time etc)** | **Potential impact on turnover** | **Notes** | **Was a continuous improvement Team established? Yes / No** | **Further actions agreed** | **General Comments** |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |