

# Lean Gold Certification Essential Body of Work



**LEAN**<sup>™</sup>  
*certification*

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The Essential Body of Work (EBW) describes the tasks conducted by lean professionals and thus lays the groundwork for understanding and evaluating the Lean Certification requirements. The tasks are listed according to categories in the current Body of Knowledge. The EBW will help potential candidates to better envision their role, encourage participation by individuals in those roles, and assist candidates in evaluating their readiness for certification.

## Lean Gold Certification Essential Body of Work

| EBW ID                                      | Task Statement  |
|---|---|
| <b>1.1 Principles for cultural enablers</b> |   |
| 1   | Break down barriers that prevent progress and encourage the participation and involvement of all stakeholders.  |
| 2   | Demonstrate humility, understanding that those who do the work are best suited to improve the work and recognize that one's lean learning is never complete.  |
| 3   | Eliminate barriers by establishing and enabling effective communication across suppliers, customers, and stakeholders, as appropriate.  |
| 4   | Create a process that will continue to thrive despite changes in leadership.  |
| 5   | Establish and enable proper training and human development to develop new "scientists" in the organization, providing opportunities for continuous growth and learning.                                   |
| 6   | Recognize and reward appropriate efforts and behaviors.   |
| <b>1.2 Process for Cultural Enablers</b>    |   |
| 7   | Actively participate on and/or lead teams.  |
| 8   | Create learning environments by developing others through delegation and "letting go" in order to stretch and grow protégés.  |
| 9   | Create systems to align with goals, objectives, mission and vision.   |
| 10  | Develop a closed-loop system for driving improvement, and ensure alignment and synchronization of business plans that support the mission/vision/purpose of the organization.                             |
| 11  | Develop and lead lean transformation efforts.   |
| 12  | Drive a sense of urgency throughout the organization around the need for "Continuous Improvement".  |
| 13  | Embrace, support and promote effective environmental and safety systems.  |
| 14  | Emphasize safety, and possess a higher understanding of safety and environmental impact from a strategic, community and individual perspective (e.g. stakeholders).                                       |
| 15  | Actively support, promote, communicate or provide resources for mentoring/coaching throughout the organization.   |
| 16  | Establish contingency and crisis plans.   |
| 17  | Establish organizational structures and policies where teams can thrive and customer-supplier relationships continue to strengthen over time through joint efforts and strong and frequent communication. |

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| 18  | Facilitate and develop plans that drive from current state to future state.  |
| 19  | Identify and recommend changes to organizational structure, policies, governance, etc., to promote continuous improvement and human development. |
| 20  | Identify barriers and determine ways to remove obstacles that prevent continuous improvement and compromise goals/objectives.                    |
| 21  | Provide and receive 360 degree feedback.   |
| 22  | Respect decision making processes, and understand the importance of driving consensus.   |
| 23  | Set lean vision & strategy.  |
| <b>1.3 Cultural Enabler Techniques &amp; Practices</b>  |  |
| 24  | Assess organizational design and policies/procedures to insure they promote human development and the flow of value.                             |
| 25  | Coach and mentor new lean leaders.   |
| 26  | Communicate with suppliers, stakeholders, and customers.   |
| 27  | Design and implement appropriate idea and recognition systems to promote and increase employee involvement and empowerment.                      |
| 28  | Drive information sharing both internally and with external key stakeholders.  |
| 29  | Actively support, promote, communicate or provide resources for employees to participate in the lean journey.                                    |
| 30  | Establish and drive programs and processes for people development and leader development.  |
| 31  | Establish idea systems, engagement programs, reward & recognition programs, etc.   |
| 32  | Grow personal lean learning and actively seek out knowledge, skills and mentors.   |
| 34  | Identify customers both inside and outside the organization.   |
| 38  | Plan, develop and conduct lean training sessions.  |
| 39  | Promote ideas and idea/suggestion systems.   |
| 40  | Seek and provide frequent, if not constant feedback.   |
| 42  | Share ideas, information, and feedback, and encourage others to do the same.   |
| <b>2.1 Principles of Continuous Process Improvement</b> |  |
| 44  | Advise others on how to deploy continuous process improvement techniques, and lean tools/techniques.   |
| 45  | Apply appropriate tools simultaneously for process improvement.  |
| 46  | Assume the role of change agent.   |
| 47  | Communicate the ideal state, making it apparent to others, and protect the drive toward the achievement of the ideal state.                      |
| 48  | Create flow across an extended enterprise (from suppliers through customer).   |

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| 49  | Ensure that correct tools are selected and utilized to solve the most important problems affecting customer satisfaction -- quality, cost and delivery.                                      |
| 50  | Establish and implement iterative cycles of improvement using appropriate principles and tools.  |
| 52  | Gather, analyze and use data and information to assist in problem-solving.   |
| 53  | Identify and develop measures that will assist in identifying problems or evaluating success.  |
| 54  | Identify customer expectations.  |
| 55  | Identify opportunities for improvement throughout the extended value stream, from supplier to customer (design-supply-delivery).   |
| 56  | Influence improvements in areas outside their core responsibility that are needed to effect change within their own value stream (e.g. support areas such as finance, sales, service, etc.). |
| 57  | Link improvement activities to customer satisfaction -- quality, cost and/or delivery.   |
| 58  | Plan and lead multiple, inter-related improvement projects within a value stream, including iterations of improvement within a single area or portion of a value stream.                     |
| 60  | Promote process improvement as a means to an end, not an end in itself.  |
| 61  | Request and review fact-based process knowledge from others.   |
| 62  | Scan the local environment to expose problems and barriers to flow.  |
| 64  | Teach and develop scientific thinking in others through experiential and experimental learning.  |
| 65  | Use tools to drive alignment to company vision and corporate strategies (true north).  |
| 66  | Use tools to link and align value streams, and to integrate tactical projects for value stream improvement.  |
| 67  | Link continuous improvement activities to business goals.  |
| <b>2.2 Continuous Process Improvement Systems</b> |  |
| 69  | Conduct root cause problem solving activities.   |
| 70  | Create and set improvement strategies and priorities.  |
| 71  | Define stability and standardization expectations.   |
| 73  | Determine when “lack of stability” and standardization problems occur.   |
| 74  | Encourage and share best practices.  |
| 75  | Ensure people have the training and motivation to determine the root cause of problems/abnormalities.  |
| 76  | Establish a culture of daily continuous improvement within all areas of an organization.   |
| 77  | Establish work standards and integrate the standard across value streams.  |
| 78  | Identify, customize, and evaluate tools and techniques.  |
| 79  | Help ensure the use of visual systems and methods.   |

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| 80   | Use planning tools to set strategy and direction.  |
| 81   | Use reflection to capture lessons learned and make the next round of improvement efforts better.   |
| 82   | Utilize scientific thinking (PDCA, DMAIC) as the underlying principle for all tool selection and application.  |
| <b>2.3 Continuous Process Improvement Techniques &amp; Practices</b> |  |
| 83   | Apply one or more lean tools on project driven improvement efforts.  |
| 84   | Choose appropriate tools for localized problems.   |
| 85   | Describe the impact that others have on process improvement.   |
| 86   | Develop and foster the use of standard tools and methods across the organization.  |
| 87   | Develop lean models for selling and supplier development.  |
| 88   | Engage in problem solving, root cause analysis, and scientific thinking (PDCA, DMAIC).   |
| 89   | Extend, stabilize and standardize tools and principles throughout the extended enterprise.   |
| 90   | Facilitate and enable the extension of tools to all areas and all processes within an enterprise.  |
| 91   | Provide coaching/teaching on the tools and principles of lean.   |
| 92   | Set standards for how the tools work with the entire company/enterprise.   |
| 93   | Use 3P to assist in conducting projects.   |
| 97   | Use Benchmarking to assist in understanding how you can revise a given approach.   |
| 99   | Use DFMA, QFD, FMEA to conduct projects.   |
| 100  | Use Heijunka (levelized scheduling) to conduct projects.   |
| 101  | Use Hoshin Planning to conduct projects.   |
| 104  | Use Lean Product Design to assist in conducting projects.  |
| 105  | Use methods such as hoshin planning and tools such as x-matrix and A3 to ensure alignment and measure progress regularly.  |
| 107  | Use Process Mapping to assist in conducting projects.  |
| 113  | Use Standardized Work tools for leadership and non-production areas.   |
| 114  | Use tools and techniques to build relationships in the extended value stream (e.g. joint projects with suppliers and/or customers using specific tools/methods). |
| 115  | Use tools to drive operational availability and create capacity that enables growth opportunities.   |
| 117  | Use Value Stream Mapping for the extended value stream to assist in conducting projects.   |
| 118  | Use Value Stream Mapping to conduct projects.  |

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| <b>3.1 Principles of Consistent Lean Enterprise Culture</b>              |  |
| 119  | Align plans, goals, and objectives to organizational purpose.  |
| 120  | Apply basic lean tools such as 5S and kanban in a non-production environment.  |
| 121  | Build a culture that is value stream focused and based in systemic thinking.   |
| 122  | Determine how customers and suppliers in a value stream affect one another and how connection points in a value stream affect inventory levels, lead-time, cost and quality. |
| 123  | Develop and drive policy deployment.   |
| 124  | Develop and enable the implementation of common management and reporting systems across the enterprise.  |
| 125  | Develop and implement appropriate companywide measurement systems that drive correct behaviors and support attaining business goals.   |
| 126  | Actively support, promote, communicate or provide support for collaboration up and down through the value stream.  |
| 127  | Explain the relationship of “parts to the whole”.  |
| 128  | Gather and analyze data gathered at the Gemba (actual place or where the work is done).  |
| 129  | Identify and develop measures to drive improvement and signal problems.  |
| 133  | Map the extended value stream for an organization and determine when it makes sense to engage external customers or suppliers in improvement efforts.                        |
| 134  | Measure improvement efforts – before and after – and communicating results and opportunities.  |
| 135  | Set goals for lean improvement efforts across values streams.  |
| 136  | Standardize standard work, visual management and other protocols, processes and procedures.  |
| 137  | Ensure the links in the policy deployment chain are maintained and correctly structured.   |
| 138  | Promote and encourage Leaders to visit the Gemba and ask specific questions to evaluate flow.  |
| <b>3.2 Processes for Developing a Consistent Lean Enterprise Culture</b> |  |
| 140  | Assess the long-term results of an improvement.  |
| 141  | When possible and applicable, determine ROI from improvement activities.   |
| 142  | Develop and implement appropriate management and reporting systems through collaboration with peers and executive leadership.  |
| 143  | Link rewards and recognition to desired results and set expectations that progress will be checked frequently.   |
| 144  | Manage change and ensure all affected by change are aligned with the organization’s purpose, mission, vision, goals and objectives.  |
| 145  | Promote the concept that there are supporting processes behind value creating processes.   |
| 146  | Set direction for development of standard work for management.   |
| 147  | Set direction for measurement and reporting systems that align with lean strategies.   |

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| 148   | Set expectations that human development is an integral part of all employee related practices and programs.   |
| 150   | Promote and encourage Leader involvement in Lean related activities to foster a culture of Continuous Improvement.  |
| 151   | Assess the long-term results of an improvement.   |
| <b>3.3 Consistent Enterprise Culture Techniques &amp; Practices</b> |   |
| 152   | Check and verify that necessary resources for improvement are available and being properly utilized.  |
| 153   | Deploy and redeploy resources as needed to meet objectives and support suppliers and customers.   |
| 154   | Document and analyze the process flow.  |
| 155   | Train others to use the catchball process to assist with planning.  |
| 156   | Encourage and support attainment of stretch goals that focus on increasing customer value.  |
| 157   | Ensure that feedback mechanisms are working and that measurement systems are appropriately linked to achieving business goals.                              |
| 158   | Standardize the A3 process and teach A3 to others.  |
| 159   | Use A3 thinking and the A3 development process for management level activities.   |
| 160   | Verify that progress is checked against goals frequently.   |
| <b>4.1 Principles of Business Results</b>                           |   |
| 161   | Build a sustainable business through long term planning, establishing metrics appropriate to effectively measure performance over time.                     |
| 162   | Communicate how specific improvement efforts are affecting larger business results.   |
| 163   | Explain to others how metrics and lean tools assist in attaining company goal/objectives.   |
| 165   | Practice “creativity before capital” for improvement efforts.   |
| 166   | Promote and communicate the need for the organization to reduce and/or eliminate traditional business metrics that promote non-lean behaviors and outcomes. |
| 167   | Share results and metrics with a wide group of employees and practice open-book management as much as possible.   |
| 169   | Use the “total cost” concept to determine costs.  |
| <b>4.2 Measurement Systems</b>                                      |   |
| 170   | Anticipate how various factors can move measurements positively or negatively.  |
| 171   | Develop and manage toward SMART goals.  |
| 172   | Develop SMART goals and track progress according to those goals.  |
| 173   | Eliminate metrics that drive inappropriate and counter-productive behaviors and decisions (When empowered to do so).  |

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| 174                                  | Ensure measurement systems include metrics for employee involvement, people development, safety and environmental impacts, and use those measurements to drive improvements. |
| 175                                  | Use and refine lean accounting practices to drive results.   |
| <b>4.3 Key Lean-related Measures</b> |  |
| 176                                  | Benchmark the measures of world class companies outside their own industry to ensure they are striving for the highest levels of excellence in the long run.                 |
| 177                                  | Calculate takt time, cycle time, and other key measurements.   |
| 178                                  | Gather and analyze metrics to make problems visible, and to identify and develop opportunities to create capacity for growth.  |
| 179                                  | Identify and communicate the benefits of real time, visual metrics.  |
| 180                                  | Identify processes to drive cost out of the business and maintain a broad view of cost drivers.  |
| 181                                  | Use a P&L and Balance sheet and/or basic financial measurements to measure progress.   |
| <b>General, Cross-Category</b>       |  |
| 182                                  | Act as an internal cross-functional expert providing guidance and consultation supporting the Lean Transformation.   |
| 183                                  | Define tactics and methods to foster employee engagement, successful change management and acceptance.   |
| 184                                  | Design, improve and integrate Internal Process Plans for heavily regulated environments.   |
| 186                                  | Facilitate workshops and/or other forums to focus improvement, transfer knowledge, and engage team members and leaders in activities supporting the Lean transformation.     |
| 187                                  | Introduce and sustain change across multiple cultures.   |
| 188                                  | Provide guidance to leadership in the anticipation, recognition, definition, and resolution of problems / opportunities associated with the Lean transformation.             |