***2020 Applicant's Word Doc Achievement Report Template***

***Overview – How to Use this Template***

*In writing the Achievement Report to support your Lean Sensei scores, use the headers outlined in this template. The headers mirror each section of the criteria. The Achievement Report content should focus on accomplishments over the last three to five years.*

*Your Achievement Report and Lean Sensei results must be received at the AME office by ~~Monday, March 23, 2020~~* ***Friday, April 3, 2020 – Deadline extended****.*

***Note: The Achievement Report should start with the two to three-page Plant Profile. The overview of your operation helps the assessors to better understand your application.***

*Questions regarding eligibility can be forwarded to the AME office. AME members can contact the AME office if they wish to have one of their international affiliate operations apply.*

*ACHIEVEMENT REPORT SUBMITTAL*

*Send the four printed copies of the Achievement Report and one USB flash drive to:*

*Denise Engwall*

*Association for Manufacturing Excellence*

*3701 Algonquin Road, Suite 225*

*Rolling Meadows, IL 60008*

*Questions can be directed to*

*Denise Engwall at excellenceawardl@ame.org or 224-232-5980, ext.227.*

*Applicants will be notified of the results of their submission by mid-August 2020.*

*ACHIEVEMENT REPORT FORMAT*

*The Achievement Report format should meet the following requirements:*

* *8-1/2” x 11” paper*
* *10-point font*
* *English is the official language*
* *Double-sided printing*
* *Single-spaced*
* *Maximum 25 pages - double-sided*
* *Lightweight plastic binding, wire binding preferred*
* *Four printed copies and one USB flash drive*
* *Graphs, tables, photos (in black and white, or color) to support the written material are welcomed. Pictures should be large enough for readers to see easily. Tables and graphs should be simple, clearly legible and labeled.*

*Send copies and flash drive to: Denise Engwall, AME, Suite 225, 3701 Algonquin Road, Rolling Meadows, IL 60008*

***TEMPLATE FOR ACHIEVEMENT REPORT***

*Please note…everything in italics is simply guideline information. Please eliminate it from your Achievement Report.*

*COVER PAGE*

PLANT NAME

ADDRESS

PHOTO OF FACILITY (OPTIONAL)

DATE

*The Achievement Report should include at the beginning the two to three-page Plant Profile (which you included with your Intent to Apply form).*

*Note: In some sections below, we have included optional metrics. They are an experiment to learn if we should be gathering this type of information in the future. You are not required to submit the “optional” information. If you are a hospital applying for the award we made a few changes to some of the descriptions below in the AME Lean Sensei for healthcare organizations.*

1. **Policy Deployment Process** ***300 points***

*A policy deployment process details the management system strategy and human
and organizational development system of a plant or organization as a means to achieve desired business results in terms of safety, morale, quality, cost and delivery.*

**1A. Management System** ***150 points***

***Issues to be addressed include (but are not limited to) the following:***

* Describe your plant’s policy deployment process, such as hoshin kanri planning, strategic planning, etc.
* Explain the key methods the company uses to clarify goals, define strategies identify problems and develop counter-measures.
* What is the scope and level of the plant’s cascading of policy, goals, strategies and action plans for both the shop floor and the front office?
* Describe your plant’s continuous improvement program to achieve the policy deployment plan.
* Outline the role and relationship of leadership and all associates in achieving company goals and objectives.
* Explain how you utilize standard work in your management approach, including going to the gemba (where the work is done) to learn what is really happening.
* Describe your system of outlining expectations and follow-up with all plant and site personnel.

***The aim for Management Systems is alignment: developing employees, driving collaboration across different cross functional areas of responsibilities and more effectively serving customers. Optional metric information: Provide up to two metrics you use to understand how well your management system is aligned to cost effectively serve customers. Examples might include:***

* ***Optional*** metric: How do you measure productivity improvement? What are your trends? If provided, please also share any formula used and the number of employees included as an input to your calculation.
* ***Optional*** metric: How do you measure the results of your improvement practices? How do you know you are getting better at getting better?

**1B. People Centric Leadership *150 points***

***Issues to be addressed include, but are not limited to, the following:***

* Describe your plant’s approach to ensure leaders and managers develop people’s talents and capabilities.
* Describe your plant’s approach to diversity and inclusion.
* Describe how leadership promotes self-reflection to improve leadership skills and show respect for people.
* Describe how the plant ensures leaders and managers practice effective communication, listening and relationship-building skills.
* List efforts being used to achieve a high level of employee engagement.
* Describe your plant’s problem-solving/improvement process, including the role
of teams.
* What is the role of manufacturing associates and front office personnel in achieving kaizen or continuous improvement, and how are skills related to improvement and teamwork included in employee job requirements?
* How do you regularly recognize and reward individuals and teams?
* Describe how you have changed your organization to better align for creating value across different departments and work groups.

***The aim is to create a work environment where people can do their best work and develop their talents and capabilities.***

* **Required** metric: Report three to five years’ evidence of employee engagement, including a clear description of how you measure it.
* ***Optional*** metric: What are your employee turnover statistics for the past three to five years? If you have seasonal employees, you may just share the turnover statistic for your permanent employee workforce.
1. **Safety and Environmental Health *50 points***

A safety and environmental health focus is key to successful business. Respond to the following issues aimed at ensuring safety in the workplace and the efforts aimed at achieving a carbon-neutral impact on the environment.

* Describe your safety program, including efforts to ensure ergonomic safety.
* Describe your system of outlining expectations and follow-up with all plant and site personnel.
* How are you improving your safety program?
* What is your impact on the environment?

***The aim is to have a safe work environment where everyone safely goes home at the end of the work day. There is also an aim to reduce your impact on the environment.***

* **Required** metric: Report your safety record for the past three to five years.
* **Required** metric: Report your energy efficiency record for the past three to five years.
* ***Optional***– Are there any other key metrics being used to show how you have reduced your environmental footprint?
1. **Organizational Improvement *300 Points***

*The focus and efforts to achieve excellence in manufacturing and front office processes are key to business success. This section should address how techniques and principles have been used to achieve a continuous improvement system and culture. The goal is to eliminate all non-value-added processes, which requires attention to the three M’s: waste (muda), unevenness, fluctuation and variation (mura) and overburdening people or equipment (muri). The three M’s should be viewed as fitting together as a whole system.*

*This section is not designed to see how many improvement techniques have been utilized, but to learn how you have used the appropriate techniques and processes to achieve manufacturing and front office business excellence. It is important to outline the role and relationship of all three M’s. Examples of your accomplishments and results can be presented to document improvement, such as quick changeover, reduction and more.*

**3A. Operations Improvement *200 points***

**Waste (muda)**

*Describe what you are doing to eliminate waste on the shop floor. The generally recognized forms of waste include:*

* *Overproduction*
* *Waiting*
* *Transportation time*
* *Excess process time*
* *Excess inventory*
* *Excess motion*
* *Defects*
* *Unused employee creativity*

*We have inserted a few bullet points in the template below. You may elect to use more. You are not required to respond to each of the above examples of waste. Provide a reasonable understanding of how the organization is approaching waste elimination. It is important that your award submission outline what you are doing to eliminate waste.*

* Describe efforts to identify and eliminate waste (muda) on the shop floor/operations.
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**Unevenness, fluctuation and variation (mura)**

*Describe what you are doing to identify, reduce and eliminate unevenness, fluctuation and variation on the shop floor. A criteria list of the commonly used lean techniques, tools and principles that are generally accepted to eliminate unevenness and variation include: (You are not required to use all of the following practices and may report on others.)*

* *Standard work*
* *Jidoka or stop the line*
* *Poka-yoke or mistake/error proofing*
* *Heijunka or level loading work*
* *Kanban or managing work in process*
* *Yokotan or sharing information sideways across the organization*
* *Preventative or total productive maintenance*
* *Value stream mapping*
* *Other techniques, tools or principles*

*We have inserted a few bullet points in the template. You may elect to use more, and please modify the bullet points below to reference the practice being described (e.g., standard work).*

* (Mura) Describe efforts to identify and eliminate unevenness, fluctuation and variation on the shop floor/operations
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**Overburdening people or machines (muri)***Describe efforts to identify and eliminate all forms of overburdening people and machines on the shop floor.*

*Muri is often the result of muda and/or mura practices. You are not required to use all of the following practices and may report on others. Typical actions include:*

* *5S standards and discipline*
* *Cellular layout*
* *One-piece flow*
* *Point-of-use tools*
* *Quick changeover*
* *Visual systems*
* *Right-sized equipment*
* *Ergonomic equipment and processes*
* *Part and material presentation*
* *Other techniques, tools or principles*

*5S and heijunka, among other techniques, can be viewed as being focused on both the unevenness and overburden categories.*

*We have inserted a few bullet points in the template. You may elect to use more, and please modify the bullet points below to reference the practice being described (e.g. 5S standards and discipline).*

* (Muri) Describe efforts to identify and eliminate the overburdening of people and machines on the shop floor/in operations.
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**3B. Business Improvement** ***100 points***

*It has been demonstrated by many organizations that manufacturing techniques, tools and principles can be operationally applied to transactional or front office activities. The same processes/practices are listed to guide your award submission.*

**Waste (muda)**

*Describe efforts to identify and eliminate all forms of waste (muda) in the front of office/business operations. Examples of waste:*

* *Overproduction*
* *Waiting*
* *Transportation time*
* *Excess process time*
* *Excess inventory*
* *Excess motion*
* *Defects*
* *Unused employee creativity*

*We have inserted a few bullet points in the template (you may elect to use more). You are not required to respond to each of the above examples of waste. Provide us a reasonable understanding of how the organization is approaching waste elimination.*

* Describe efforts to identify and eliminate waste (muda) in business operations.
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* Describe efforts to identify and eliminate waste (muda) in business operations.

**Unevenness, fluctuation, and variation (mura)***Describe efforts to identify and eliminate all forms of unevenness, fluctuation and variation in the front office.*

*Describe what you are doing to identify, reduce and eliminate unevenness, fluctuation and variation. The criteria list the commonly used lean techniques, tools and principles that are generally accepted to eliminate unevenness and variation. You are not required to use all of the following practices and may report on others. They include:*

* *Standard work*
* *Poka-yoke or mistake/error proofing*
* *Heijunka or level loading work*
* *Kanban or managing work in process*
* *Yokotan or sharing information sideways across the organization*
* *Value stream mapping*
* *Other techniques, tools or principles*

*We have inserted a few bullet points in the template (you may elect to use more) and please modify the bullet points below to reference the practice being described (e.g., standard work….).*

* (Mura) Describe efforts to identify and eliminate unevenness, fluctuation and variation in business operations
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**Overburdening people or machines (muri)***Describe all efforts to identify and eliminate all forms of overburdening people and machines in the front office. Muri is often the result of muda and/or mura practices. The lean techniques, tools and principles that are generally accepted to eliminate overburdening people and machines include, but are not limited to:*

* *5S standards and discipline*
* *Workplace layout*
* *One-piece flow*
* *Point-of-use tools*
* *Quick changeover*
* *Visual systems*
* *Right-sized equipment*
* *Ergonomic equipment and processes*
* *Other techniques, tools or principles*

*5S and heijunka, among other techniques, can be viewed as being focused on both the unevenness and overburden categories.*

*We have inserted a few bullet points in the template. You may elect to use more, and please modify the bullet points below to reference the practice being described (e.g. 5S standards and discipline).*

* (Muri) Describe efforts to identify and eliminate overburdening people, systems or equipment in business operations.
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1. **Extended Value Stream Management *150 points***

*Product development and supplier management are key to achieving high-level business results to meet customer expectations. In many cases, product development and supplier management for a multi-plant corporation are not located at the plant. However, product development and supplier management techniques, tools and principles still are necessary for manufacturing success.*

*If your plant is not directly responsible for product development and supplier management, you will need to solicit expected documentation and information from the appropriate corporate offices and describe your processes appropriately. If the plant is part of a multi-plant corporation, include information from that perspective if it impacts your extended value stream.*

*Product development and supplier costs significantly impact the total cost of
a product.*

***This section should describe the processes of product development and supplier management by the plant applying for the AME Excellence Award.***

*Please include appropriate data or results where possible to document the trend and level of improvement.*

**4A. Product Development**  ***75 points***

***Issues to be addressed include (but are not limited to) the following:***

* Describe processes to validate new product (or service) development and launch.

* How do you foster an understanding of customer expectations within your total workforce?
* What processes do you have in place at the highest level to foster breakthrough solutions vs. incremental improvement to meet and/or stay ahead of customer expectations?
* What innovative processes and/or lessons-learned methods are used to reduce cost and increase value to the customer?
* Describe the processes used for improvement of existing products (or services).
* What do you do in your new product development process to minimize total cost?
* What is your approach to benchmarking?
* How do you focus on variety reduction, commonality and modularity?

**4B. Supplier Development and Procurement *75 points***

***Issues to be addressed include (but are not limited to) the following:***

* How do you partner with your suppliers to minimize total cost to your value stream?
* What is your focus regarding supplier certification?
* What is your supplier focus for continuous improvement to improve business results?
* What are your processes to achieve perfection in product and supplier management?
* What innovative processes are being used to improve market service and logistics?
1. **Performance Results *200 points***

*All the issues and questions in sections 1 to 4 are designed to improve the means to the desired ends performance results. This section focuses on quality, cost, delivery and profitability. The metrics shared should outline three to five years of results detailing the trend toward improvement, including an explanation of significant change in the trend.*

*You are encouraged to include evidence of the “level of achievement” of your plant compared to your industry or other plants within your corporation. Results can
be based on the plant as a profit center or a budget center. Within the four key metrics, two specific result measures (or theoretically similar measures) are required.*

***Failure to provide the performance results requested will result in a lower section score, reducing your plant’s chances of receiving a plant assessment site visit.***

***In this section, report the plant’s results for a minimum of three years for each of
the following:***

**5A. Quality *50 points***

***The aim is to provide the customer with zero defective products. The following standard measures are to be reported:***

* **Required** metric: Scrap and/or yield rates (planned versus unplanned) for the last three to five years.
* **Required** metric: Customer rejects annually (ppm) or appropriate industry measurement for the last three to five years.
* **Required** metric: Warranty claims for the last three to five years.
* Other appropriate quality-related measures that support the achievement of your Policy Deployment Plan.

**5B. Cost *50 points***

***The aim is to reduce cost and improve plant productivity. The two following required measures are to be reported (with other measurements included if desired):***

* **Required** metric: Value added per associate or employee (sales minus purchased materials divided by total headcount) for the last three to five years.
* **Required** metric: Inventory turns—raw materials, work-in-process and finished as appropriate, for the last three to five years.
* Other appropriate cost-related measures that support the achievement of your Policy Deployment Plan.

**5C. Delivery *50 points***

***The aim is to provide the customer the product on time and in the quantity desired. The following two required measures are to be reported (with other measurements included if desired):***

* **Required** metric: Percent on-time and complete shipments for the last three to five years.
* **Required** metric: Premium freight costs, including incoming raw material or finished goods shipment for the last three to five years. (Premium freight is abnormal freight to meet customer demand.)
* Other appropriate delivery-related measures that would support the achievement of your Policy Deployment Plan.

**5D. Profitability *50 points***

***The aim is to detail financial achievement to ensure the ongoing operation of the plant. The following two required measures are to be reported (with other measurements included if desired):***

* **Required** metric: Earnings before interest and taxes (EBIT) profitability or other appropriate measure to document plant profitability for the last three to five years.
* **Required** metric: Operating income on manufacturing assets ratio for the last three to five years.
* Other appropriate profitability-related measures that would support the achievement of your Policy Deployment Plan.

***Please note:***

*If profitability information is confidential, you can substitute percentage changes from year-to-year.*