# 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. |