

Checklist for setting up an 8 Step Problem Solving Event with A3

	Activity	Estimated Time	Owner	Date (in rel. to "Event")
1	Do Gemba Walk to determine the current state of the problem and to determine who should be included in the PDSA workshop.	30 min-1 hour	Lean Practitioner/ Project Lead	4 weeks prior
2	Name project, develop list of responsible parties and develop accessible communication plan.	1 hour	Lean Practitioner/ Project Lead	3 weeks prior
3	Meet with project sponsor to determine scope of project and timeline. Confirm list of participants and responsible parties and how accessibility measures will be provided for meetings and event.	1 hour	Lean Practitioner/ Project Lead/ Sponsor	3 weeks prior
4	Send invitations to all participants including accessibility information, safety and security measures (if necessary) and links to PDSA overview and A3 template.	1 hour	Sponsor / Mgmt team	3 weeks prior
5	Schedule date (1 full day or 2-1/2 days) & secure logistics for the Event. Ensure space (in person, hybrid or virtual) is accessible and safe.	1-2 hours	Lean Practitioner/ Project Lead (or Admin)	3 weeks prior
6	Identify the necessary data available to complete step 2; does not have to be comprehensive, but pull together what is available, knowing that more may be needed or requested at the event.	2-4 hours	Project Lead / Performance Mgmt	2-3 wks prior
7	Hold pre-meeting with Sponsor, Project Leads and Mgmt team to do PDSA overview and plan event timing.	1 hour	Project Lead/ Sponsor/ Mgmt Team	2.5 weeks prior
8	Create Event Charter	2-4 hours	Sponsor/ Project Lead	2 weeks
9	Prepare for workshop (printed materials, secure supplies, room set up, draft workshop agenda)	1-2 hours	Lean Practitioner	1 week prior
10	Send reminder to all participants for final attendees list and include charter document for review.	1 hour	Project Lead	1 week prior
11	Circulate the Communications about the A3 event to all staff who may be impacted by prospective change.	30 min	Admin on behalf of Sponsor	1 week prior
12	Hold Event	8 hours	All	Event
13	Follow up with all participants with survey to make sure that all voices were heard, all concerns were documented and to inquire about areas for improvement.	1 hour	Lean Practitioner	1 day after

Notes:

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Sponsor—Executive responsible for the outcomes of the A3, has authority to commit staff resources and ability to address issues that may surface from multiple offices (as identified in the A3)

Project Lead—person responsible for the overall implementation of the A3 Event recommendations, will not necessarily “own” the activities, but will need to coordinate with the person(s) responsible, track issues and status, provide status updates, facilitate Sponsor / Steering Committee updates, suggest maintaining same person for future iterations, but not required

Facilitator—person responsible for the facilitation of the A3 event, recommended “neutral” party who will not contribute to the workshop content conversation, doesn’t necessarily need to be the same person for future iterations