



Automation Assessment Tool – assessing your automation needs from a lean perspective

The Automation Assessment Tool is designed for practitioners who have some exposure to continuous improvement tools, and it will assist in making decisions pertaining to automation. It can be used in whole or in part, with each tab in the spreadsheet providing an electronic version of tools that can also be printed and administered manually.

The first tab provides the Plan-Do-Check-Act cycle to be used in pulling together information in order to make an informed decision on whether automation is the suitable solution to a process problem. This tool does not make the final decision, however, it allows business decisions to be made by process owners and management teams based on actual data.

If individuals have not been exposed to the tools, they may require some guidance when using the tool for the first time or may choose to use only sections of the tool. The manual further explains the tools and the suitability. Nonetheless, the use of this tool will allow anyone to learn more about any given process, and the opportunities to improve through input from the employees who are directly involved in the process.

The Tool is not something that can be used in just an hour or two. There are 16 tabs to the Automation Assessment Tool plus a 40-page Manual to guide you through the use of the tool. It would take an estimated 3 days to go through the entire process, if time were dedicated to the assessment.

FAQs

What is the Automation Assessment Tool?

A series of spreadsheets with an accompanying manual that is used to guide the collection of data that allows a team of process owners to determine if automation is necessary to meet customer demand.

What will I get out of it?

An understanding of the roadblocks to increasing production and identification of waste. This will then contribute to a fuller understanding of if and where in the process automation may be required.

How much time will it take to complete the assessment?

The assessment could be completed in a concentrated 3-day event (“kaizen” in lean terminology). However, under normal production, it would be dependent upon the time made available. It is recommended that the assessment be completed within 30 days.

How much expertise is needed to complete the assessment?

Some basic understanding of the tools provided is needed. Some may gather enough understanding from the example and the manual provided; however, it is recommended that an initial assessment be led by someone with some experience utilizing continuous improvement tools.

Do I have to follow all sections?

Although this tool is designed to make decisions about automation, it can be used in sections to evaluate and improve any process as needed.

Why doesn't the tool give me a "yes" or "no" to automate?

No decision can be made without also considering the impact on human resources, economic health of the company, and other factors such as the external environment in which the company is operating.

How do I get started?

Begin by printing off and looking through the Manual [[link to manual](#)]. Then go into the Tool itself [[link to Tool](#)] and carefully read the "How to use the Tool" tab. Look through the remaining tabs to get an idea of what information you will be gathering and analyzing. Then begin the process outlined in the "How to use the Tool" tab.