

Heijunka (Production Leveling) Implementation Checklist

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Phase 1: Assessment & Preparation

Focuses on understanding the current state, identifying pain points, and gaining buy-in for Heijunka implementation.

Describe the current production environment (e.g., make-to-stock, make-to-order, mixed).

Write something...

Estimate the current level of production variability (e.g., using a scale of 1-10, 1 being very stable, 10 being extremely variable).

Enter a number...



Identify the primary goals of Heijunka implementation (Select all that apply).

- ☐ Reduce lead time
- ☐ Reduce WIP (Work in Progress)
- ☐ Reduce inventory
- ☐ Improve throughput
- ☐ Level workload
- ☐ Improve customer satisfaction
- ☐ Other (Please Specify)

Identify key stakeholders for Heijunka implementation and their roles.

Write something...

What are the current challenges that contribute to production instability? (Select all that apply)

- ☐ Demand Fluctuations
- ☐ Long Setup Times
- ☐ Material Shortages
- ☐ Equipment Downtime
- ☐ Lack of Standardized Processes
- ☐ Poor Communication
- ☐ Other (Please Specify)

Target Date for Initial Heijunka Assessment Completion

Enter date...

Document potential resistance to change and strategies for addressing it.

Write something...

Phase 2: Data Gathering & Analysis

Involves collecting and analyzing historical data to understand demand patterns and production capabilities.

Historical Demand Data Collection Period (Months)

Enter a number...

Upload Historical Sales Data (CSV/Excel)

 Upload File

Describe Data Sources Used (e.g., ERP, CRM, spreadsheets)

Write something...

Number of Product Families/Lines to Analyze

Enter a number...

Which Demand Patterns Observed (Select all that apply)

- ☐ Seasonal
- ☐ Trend
- ☐ Cyclical
- ☐ Random/Unpredictable
- ☐ Lumpy/Irregular

Average Lead Time for Raw Materials (Days)

Enter a number...

Current WIP (Work-In-Progress) Levels (Units)

Enter a number...

Describe any significant external factors impacting demand (e.g., promotions, competitor actions)

Write something...

Phase 2a: Demand Forecasting & Segmentation (if applicable)

Focus on forecasting and classifying demand to understand variability and prioritize product lines.

Historical Demand Data Points Analyzed (Months/Years)

Forecasting Methods Considered/Implemented

- ☐ Moving Average
- ☐ Exponential Smoothing
- ☐ Regression Analysis
- ☐ Seasonal Decomposition
- ☐ Collaborative Forecasting (Sales/Marketing)

Primary Demand Segmentation Criteria

- ☐ Product Family
- ☐ Customer Type
- ☐ Geographic Region
- ☐ Order Size/Volume
- ☐ Seasonality

Forecast Accuracy (MAPE - Mean Absolute Percentage Error) - Baseline

Enter a number...

Forecast Accuracy (MAPE - Mean Absolute Percentage Error) - Post-Segmentation/Forecasting

Enter a number...

Justification for Selected Segmentation Criteria

Write something...

Level of Customer Collaboration in Forecasting

- ☐ None
- ☐ Informal Communication
- ☐ Regular Meetings
- ☐ Shared Forecasts

Phase 3: Heijunka Design & Planning

Defining the Heijunka plan: Establishing takt time, batch sizes, sequence, and buffer strategies.

Calculate Current Takt Time

Enter a number...

Determine Initial Heijunka Sequence Type (e.g., Fixed Sequence, Dynamic Sequence)

- ☐ Fixed Sequence
- ☐ Dynamic Sequence
- ☐ Hybrid

Establish Initial Batch Sizes (considering changeover time and inventory costs)

Enter a number...

Document Rationale for Batch Size Decisions

Write something...

Calculate Changeover Times for all Product Variations

Enter a number...

Define Buffer Strategy (e.g., Supermarket, Kanban)

- ☐ Supermarket
- ☐ Kanban
- ☐ None

Calculate Minimum Buffer Levels (based on variability and takt time)

Enter a number...

Describe the Heijunka Schedule Logic (how production is sequenced)

Write something...

Phase 4: Pilot Implementation & Testing

Implementing Heijunka on a limited scope to test the plan and identify areas for improvement.

Select Pilot Production Line

- ☐ Line 1
- ☐ Line 2
- ☐ Line 3
- ☐ Other (Specify)

Pilot Duration (in days)

Enter a number...

Describe the initial scope of the pilot Heijunka implementation (e.g., products, processes)

Write something...

Which metrics will be tracked during the pilot?

- ☐ Throughput
- ☐ Work-in-Progress (WIP)
- ☐ Lead Time
- ☐ Inventory Levels
- ☐ On-Time Delivery
- ☐ Employee Morale (via survey)

Pilot Start Date

Enter date...

Pilot End Date (Planned)

Enter date...

Document any significant challenges encountered during the pilot.

Write something...

Overall Pilot Success (Initial Assessment)

- ☐ Highly Successful
- ☐ Successful
- ☐ Moderately Successful
- ☐ Unsuccessful - Requires Major Revision
- ☐ Unsuccessful - Requires Complete Re-evaluation

Upload relevant data/charts from the pilot (optional)

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Phase 5: Full-Scale Implementation

Rolling out the Heijunka plan across the entire manufacturing operation.

Initial Product Line Rollout Sequence

- ☐ Priority 1 (High Volume, Low Variability)
- ☐ Priority 2 (Moderate Volume, Moderate Variability)
- ☐ Priority 3 (Lower Volume, High Variability)

Scheduled Start Date for Full-Scale Implementation

Enter date...

Number of Production Lines Initially Included

Enter a number...

Describe any deviations from the original Heijunka design plan during full-scale rollout.

Write something...

Which departments are actively participating in the full-scale rollout?

- ☐ Production
- ☐ Engineering
- ☐ Sales/Demand Planning
- ☐ Quality
- ☐ Supply Chain

Level of Automation used in initial rollout.

- ☐ Manual
- ☐ Semi-Automated
- ☐ Fully Automated

Contact Person for Full-Scale Implementation

Write something...

Document any initial training provided to employees during full-scale launch.

Write something...

Phase 6: Monitoring & Continuous Improvement

Tracking key metrics and making adjustments to the Heijunka plan to optimize performance.

Average Daily Production Variation (compared to target)

Enter a number...

On-Time Delivery Performance (OTD)

Enter a number...

Work-in-Progress (WIP) Inventory Levels

Enter a number...

Overall team satisfaction with the Heijunka system

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

Summarize key observations and issues encountered during the monitoring period.

Write something...

Which metrics are showing a concerning trend?

- ☐ Production Variation
- ☐ On-Time Delivery
- ☐ WIP Inventory
- ☐ Lead Time
- ☐ Equipment Downtime
- ☐ None

Date of last Heijunka Review Meeting

Enter date...

Document Action Items and assigned owners resulting from the review

Write something...

Supporting Infrastructure & Training

Ensuring necessary systems, tools, and employee training are in place to support Heijunka.

Current Level of Kanban System Usage (if applicable)

- ☐ No Kanban
- ☐ Basic Kanban
- ☐ Advanced Kanban (with automated replenishment)

Systems/Tools to be Integrated with Heijunka (select all that apply)

- ☐ ERP System
- ☐ MES System
- ☐ MRP System
- ☐ Quality Management System
- ☐ Production Scheduling Software

Number of Employees Requiring Initial Heijunka Training

Enter a number...

Target Date for Initial Heijunka Training Completion

Enter date...

Training Program Outline (brief description)

Write something...

Training Delivery Method (select one)

- ☐ Classroom
- ☐ Online Modules
- ☐ On-the-Job Training

Training Materials (presentations, guides, etc.)

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Documented Standard Operating Procedures (SOPs) for Heijunka Processes (describe)

Write something...

Availability of Visual Management Tools (e.g., whiteboards, displays)

- ☐ Not Available
- ☐ Limited Availability
- ☐ Fully Available