

TRUELEAN SOLUTIONS
LEARNING CENTRE

LEAN LEADERSHIP & MANAGEMENT SYSTEM ASSESSMENT

From Leadership Intent to Operational Evidence

A practical developmental diagnostic for manufacturing
and operations-driven organizations

BEHAVIOUR × SYSTEM × EVIDENCE

Clarity. Simplicity. Results.

Learning Centre Resource | Final Design Edition

1. Purpose of the Assessment

Lean transformation is often evaluated by asking which tools an organization has implemented: 5S, Standard Work, visual boards, Kaizen, Kanban, A3s, Gemba walks, or tier meetings. Those practices can be valuable. Their existence, however, does not necessarily mean that an effective Lean management system exists.

The TrueLean Lean Leadership & Management System Assessment examines a different question:

CENTRAL QUESTION

Are leadership behaviours and management systems creating the conditions required for disciplined execution, problem-solving, continuous improvement, and sustainable operational performance?

The assessment evaluates the organization through three complementary lenses:

LEADERSHIP BEHAVIOUR: What leaders consistently do.

MANAGEMENT SYSTEM: The routines, standards, processes, controls, and mechanisms established to manage the operation.

OPERATIONAL EVIDENCE: What can actually be observed at Gemba or demonstrated through operational information and results.

TRUELEAN MODEL

Leadership Behaviour × Management System × Operational Evidence → Sustainable Improvement Capability

2. Who Should Use This Assessment?

Designed for plant and operations leaders, manufacturing managers, supervisors, continuous-improvement and operational-excellence leaders, engineers, functional leaders, and organizations beginning, rebuilding, or strengthening a Lean transformation.

3. Important Use Statement

INTEGRITY STATEMENT

This assessment is a practical developmental diagnostic. It is not a certification, audit standard, compliance assessment, or scientifically validated psychometric instrument. Results should be verified, where appropriate, through operational data, Gemba observation, employee input, documented standards, management-system evidence, and performance trends.

4. How to Complete the Assessment

1. Read the statement and evaluate the current condition - not what the organization intends to do.
2. Consider the evidence. Ask: What have we observed that supports this rating?
3. Select a maturity rating using the 1-5 scale.
4. Record the strongest evidence supporting the rating and any important contradiction.
5. At the end of each dimension, assign an evidence-confidence rating: High, Medium, or Low.

5. TrueLean Maturity Scale

Score	Level	Interpretation
1	Reactive	Little consistent practice exists. Performance depends heavily on individual intervention and reaction.
2	Structured	Basic expectations or mechanisms exist, but execution is inconsistent or person-dependent.
3	Managed	Practices are routinely applied, responsibilities are understood, and operational performance is actively managed.
4	Capable	Leadership behaviours and management systems are consistently demonstrated and supported by credible operational evidence.
5	Adaptive	The practice is deeply integrated. The organization learns from changing conditions and deliberately improves the operating system itself.

SCORING DISCIPLINE

Do not award a 4 or 5 primarily because a policy, procedure, board, meeting, training program, or Lean tool exists. Higher maturity requires evidence that the practice is being used effectively and is influencing the operating condition.

N/A - Not Applicable / Insufficient Basis to Assess. N/A receives no numerical value and is excluded from the average. Record the reason whenever N/A is selected.

DIMENSION 01

Purpose & Customer Alignment

WHAT THIS DIMENSION ASKS

Does leadership connect daily operational priorities and improvement activity to customer and business requirements?

01A - Leadership Behaviour

Leaders consistently connect operational priorities, decisions, and improvement activities to clearly understood customer requirements and business objectives.

Look for leadership communication, priority-setting, trade-off decisions, Gemba conversations, and connections between improvement activity and business/customer needs.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

01B - Management System

Customer and business requirements are translated into defined operational objectives, measures, targets, and improvement priorities.

Look for annual operating objectives, Hoshin where appropriate, KPI structures, SQDCI measures, customer requirements, departmental objectives, and improvement priorities.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

01C - Operational Evidence

Employees at appropriate organizational levels can explain the operation's most important priorities and how their work contributes to customer and business performance.

Look for employee conversations, consistent priorities across levels, KPI understanding, customer-performance measures, and alignment between stated and actual priorities.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

Dimension Score

___ / 5

Evidence Confidence

☐ High ☐ Medium ☐ Low

N/A Rationale, if any

DIMENSION 02

Gemba & Reality-Based Leadership

WHAT THIS DIMENSION ASKS

Do leaders understand operations through direct observation rather than relying primarily on reports?

02A - Leadership Behaviour

Leaders routinely observe work where it occurs, ask questions, listen to employees, and seek to understand actual conditions before drawing conclusions.

Look for direct process observation, questioning versus directing, employee interaction, and evidence that leaders seek facts before acting.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

02B - Management System

Regular Gemba activity is incorporated into leadership routines through Leader Standard Work or an equivalent structured practice.

Look for Gemba schedules, Leader Standard Work, observation routines, expected cadence, escalation mechanisms, and follow-up.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

02C - Operational Evidence

Gemba observations result in meaningful learning, identified abnormalities, appropriate action, escalation, or structured problem-solving when required.

Look for observation records, actions, escalations, problem-solving activity, learning, and closed-loop follow-up.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

WATCH FOR

Watch for Gemba becoming a ceremonial management walk with little learning, coaching, or action.

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

DIMENSION 03

Problem Visibility & Speaking Up

WHAT THIS DIMENSION ASKS

Does the organization make abnormalities visible and encourage people to surface problems early?

03A - Leadership Behaviour

Leaders respond constructively when employees identify abnormalities, mistakes, risks, or bad news and focus first on understanding the condition rather than assigning blame.

Look for leader reactions to bad news, safety concerns, defects, missed targets, and employee escalation.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

03B - Management System

Visual controls and escalation mechanisms make deviations from expected safety, quality, delivery, cost, people, and process conditions visible at the appropriate level.

Look for SQDCI boards, Andon/escalation mechanisms, reaction plans, near-miss reporting, and defined escalation paths.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

03C - Operational Evidence

Operational problems are surfaced promptly, employees demonstrate willingness to raise concerns, and significant abnormalities do not routinely remain hidden until they become major disruptions.

Look for employee conversations, delayed discoveries, recurring operational surprises, and actual escalation behaviour.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

WATCH FOR

Watch for consistently green dashboards while the operation is experiencing obvious performance problems.

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

DIMENSION 04

Standards & Process Discipline

WHAT THIS DIMENSION ASKS

Are important processes defined, understood, followed, and improved?

04A - Leadership Behaviour

Leaders consistently reinforce established standards while encouraging employees to identify and test better ways of performing the work.

Look for leader response to deviation, coaching, and disciplined improvement of standards.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

04B - Management System

Critical work has appropriate, current, accessible, and clearly defined operating standards or Standard Work.

Look for Standard Work, SOPs, visual standards, revision control, qualification processes, and accessibility at point of use.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

04C - Operational Evidence

Actual work generally follows the defined method; meaningful deviations are identified and addressed; and verified improvements are incorporated into the standard.

Look for actual-versus-documented work, process variation, revision history, and evidence that improvements change the standard.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

Dimension Score

___ / 5

Evidence Confidence

☐ High ☐ Medium ☐ Low

N/A Rationale, if any

DIMENSION 05

Daily Management & Accountability

WHAT THIS DIMENSION ASKS

Does the organization have a disciplined mechanism for managing operational performance every day?

05A - Leadership Behaviour

Leaders review performance at an established cadence, clarify abnormalities, assign ownership, follow through on commitments, and escalate issues when necessary.

Look for cadence, ownership, follow-through, escalation, and leader behaviour during performance reviews.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

05B - Management System

A defined daily-management process makes target-versus-actual performance, abnormalities, actions, ownership, due dates, and escalation visible.

Look for SQDCI/tier boards, KPI definitions, meeting standards, action logs, and escalation criteria.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

05C - Operational Evidence

Performance information is current, actions are completed and verified, unresolved problems move through the appropriate escalation path, and recurring issues trigger deeper problem-solving.

Look for overdue actions, closure verification, recurring problems, escalation response, and effectiveness checks.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

WATCH FOR

Watch for meetings becoming status-reporting sessions rather than mechanisms for managing abnormalities.

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

DIMENSION 06

Problem-Solving & Learning

WHAT THIS DIMENSION ASKS

Does the organization solve causes rather than repeatedly responding to symptoms?

06A - Leadership Behaviour

Leaders coach teams to define problems clearly, investigate causes, test countermeasures, and verify results rather than immediately prescribing solutions.

Look for coaching questions, problem definition, cause investigation, countermeasure testing, and verification.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

06B - Management System

The organization uses appropriate structured problem-solving methods and establishes clear expectations for when and how they should be applied.

Look for PDCA, A3, 5 Whys, Fishbone, RCA, corrective-action processes, and DMAIC where appropriate.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

06C - Operational Evidence

Significant problems demonstrate evidence of verified causes, tested countermeasures, effectiveness checks, reduced recurrence, and incorporation of learning into standards or systems.

Look for completed investigations, effectiveness checks, recurrence trends, and revised standards/systems.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

WATCH FOR

Watch for corrective actions consisting primarily of 'retrain the operator' without evidence that the underlying process condition was understood.

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

DIMENSION 07

People Development & Coaching

WHAT THIS DIMENSION ASKS

Is improvement capability deliberately developed throughout the organization?

07A - Leadership Behaviour

Leaders deliberately coach and develop employees so they can assume greater responsibility for standards, problem-solving, improvement, and operational decision-making.

Look for coaching, delegation with development, and increasing employee ownership.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

07B - Management System

Critical operational and leadership capabilities are identified and supported through structured training, qualification, cross-training, skills management, and development processes.

Look for skills matrices, qualification criteria, cross-training, development plans, and succession mechanisms.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

07C - Operational Evidence

Capability gaps are visible and being addressed; employees demonstrate increasing competence; and critical operational knowledge is not concentrated in only a few individuals.

Look for competence growth, reduced single-point dependency, training coverage, and qualification evidence.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

DIMENSION 08

Improvement & Experimentation

WHAT THIS DIMENSION ASKS

Is continuous improvement part of everyday work rather than primarily an event-driven activity?

08A - Leadership Behaviour

Leaders encourage employees to identify opportunities, test reasonable countermeasures, learn from results, and improve their own work.

Look for permission to experiment, coaching, learning from results, and employee ownership.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

08B - Management System

A practical mechanism exists to identify, prioritize, test, implement, measure, standardize, and sustain improvement opportunities.

Look for improvement pipelines, PDCA/Kaizen mechanisms, prioritization, benefit verification, and sustainment.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

08C - Operational Evidence

Improvement activity produces observable process changes and measurable learning or performance improvement, with successful changes incorporated into normal work.

Look for before/after conditions, verified benefits, revised standards, and sustainment checks.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

WATCH FOR

Watch for counting ideas or Kaizen events as the primary evidence of improvement success.

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

DIMENSION 09

Strategy-to-Execution Alignment

WHAT THIS DIMENSION ASKS

Can the organization translate strategic priorities into operational execution?

09A - Leadership Behaviour

Leaders consistently use strategic priorities to guide operational decisions, resource allocation, and improvement priorities.

Look for resource trade-offs, priority decisions, and alignment between strategy and daily leadership attention.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

09B - Management System

The organization has an appropriate mechanism for translating strategic priorities into operational objectives, measures, ownership, initiatives, and review routines.

This may include Annual Operations Planning, Hoshin Kanri, policy deployment, an X-Matrix, KPI cascades, or another appropriate strategy-execution mechanism.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

09C - Operational Evidence

Major operational priorities and improvement initiatives can be traced to strategic objectives, and progress is regularly reviewed and adjusted when conditions change.

Look for traceability, review cadence, ownership, resource alignment, and adjustment based on evidence.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

WATCH FOR

Watch for too many simultaneous 'top priorities' competing for the same resources.

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

DIMENSION 10

Sustainment & Organizational Capability

WHAT THIS DIMENSION ASKS

Can the operating system continue improving without depending on individual champions or temporary initiatives?

10A - Leadership Behaviour

Leaders consistently reinforce management routines, develop successors, protect proven standards, and continue improvement after initial results have been achieved.

Look for reinforcement, succession, discipline after initial success, and continuity through leadership changes.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

10B - Management System

Governance, management review, standardization, capability development, and benefits-verification mechanisms support improvement sustainment over time.

Look for sustainment reviews, governance, capability development, benefits tracking, and control mechanisms.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

10C - Operational Evidence

Improved conditions remain effective over time, important routines continue despite leadership or personnel changes, and the organization demonstrates increasing ability to improve without dependence on individual champions or external support.

Look for KPI trends, control plans, audit observations, ownership transfer, and internal problem-solving capability.

1	2	3	4	5	N/A	Score
EVIDENCE / OBSERVATIONS						

Dimension Score	Evidence Confidence	N/A Rationale, if any
___ / 5	☐ High ☐ Medium ☐ Low	_____

Assessment Summary

Transfer the results from the 10 dimension pages. The overall score provides context, not a verdict. Improvement priorities should be determined primarily from dimension-level results, operational risk, business impact, and supporting evidence.

Dimension	Behaviour	System	Evidence	Overall	Confidence
1. Purpose & Customer Alignment					
2. Gemba & Reality-Based Leadership					
3. Problem Visibility & Speaking Up					
4. Standards & Process Discipline					
5. Daily Management & Accountability					
6. Problem-Solving & Learning					
7. People Development & Coaching					
8. Improvement & Experimentation					
9. Strategy-to-Execution Alignment					
10. Sustainment & Organizational Capability					

OVERALL MATURITY

Overall Score: ____ / 5.0 Maturity: ☐ Reactive ☐ Structured ☐ Managed ☐ Capable ☐ Adaptive

Three-Lens Profile

LENS SCORES

Leadership Behaviour: ____ / 5 Management System: ____ / 5 Operational Evidence: ____ / 5

Where are the three lenses aligned?

Where is there a significant difference between what leaders do, what systems exist, and what operational evidence demonstrates?

Gap Flags

For each dimension: Gap = Highest Lens Score - Lowest Lens Score.

Spread	Interpretation
<0.5	Generally aligned
0.5-0.9	Review
≥1.0	Significant gap requiring investigation

A gap does not establish causation. It identifies a condition requiring further investigation.

Evidence Confidence

HIGH: Direct observation plus reliable supporting evidence.

MEDIUM: Some direct evidence exists; additional verification would strengthen the conclusion.

LOW: Primarily perception, interview, or self-assessment; Gemba/data verification is required.

IMPORTANT

Low confidence is not a low score. It is a signal to verify before acting on the conclusion.

Results Interpretation & Priority Selection

INTERPRETATION PRINCIPLE

Do not manage the average. Understand the condition behind the score.

Evaluate each dimension using four considerations: Maturity Gap, Business Impact, Evidence Strength, and Systemic Influence.

PRIORITY 1 - ACT: A meaningful weakness supported by credible evidence and important business implications.

PRIORITY 2 - VERIFY: A potentially important weakness where additional evidence is required.

PRIORITY 3 - MONITOR / DEVELOP: Not an immediate critical weakness but an area worth strengthening.

Dimension	Maturity	Business Impact	Confidence	Classification
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Top Three Priorities

Priority 1

Dimension: _____

Current condition - What is happening now?: _____

Why it matters - What performance or business risk does it create?: _____

Evidence - What supports this conclusion?: _____

Desired condition - What should become different?: _____

First management action: _____

Priority 2

Dimension: _____

Current condition - What is happening now?: _____

Why it matters - What performance or business risk does it create?: _____

Evidence - What supports this conclusion?: _____

Desired condition - What should become different?: _____

First management action: _____

Priority 3

Dimension: _____

Current condition - What is happening now?: _____

Why it matters - What performance or business risk does it create?: _____

Evidence - What supports this conclusion?: _____

Desired condition - What should become different?: _____

First management action: _____

TrueLean 30-Day Action Plan

Complete one action plan for each selected priority. Avoid arbitrary promised percentage improvements. Define the observable condition you expect to change and the evidence that will tell you whether it did.

PRIORITY

OBSERVED CONDITION

DESIRED CONDITION

LEADERSHIP BEHAVIOUR

MANAGEMENT-SYSTEM ACTION

EVIDENCE OF IMPROVEMENT

OWNER

REVIEW CADENCE

30-DAY CHECK DATE

30-Day Check

☐ Improved as expected ☐ Some improvement - continue/adjust ☐ No meaningful improvement ☐ New information changed our understanding

What did we learn?

Next countermeasure / action:

Executive Results Dashboard

OVERALL MATURITY

____ / 5.0 - _____

THREE LENSES

Behaviour ____ | System ____ | Evidence ____

Strongest Dimensions

1. _____
2. _____
3. _____

Priority Dimensions

1. _____
2. _____
3. _____

Significant Gap Flags

____ of 10 dimensions

Evidence Confidence

High ____ Medium ____ Low ____

Top Three Management Actions

1. _____
2. _____
3. _____

Next Review

NEED HELP INTERPRETING OR VALIDATING THESE FINDINGS?

TrueLean Solutions can provide an independent operational review and help translate assessment findings into practical improvement priorities. Request a Consultation → trueleansolutions.ca

Optional Cross-Level Calibration

For a deeper view, the assessment may be completed independently by Executive Leadership, Plant/Operations Management, Supervisors, CI/Engineering, and Frontline Employees. Do not simply average away differences in perception.

EXAMPLE

Problem Visibility & Speaking Up: Executive 4.3 | Plant Management 3.6 | Supervisors 2.8 | Frontline 1.9. The important finding is the 2.4-point spread, not only the 3.15 average. Use the spread to trigger Gemba investigation and dialogue.

TRUELEAN PRINCIPLE

Perception differences are not automatically problems. They are signals telling us where further observation and dialogue may be valuable.

From Assessment to Improvement

ASSESS	PLAN	IMPLEMENT	IMPROVE	SUSTAIN
Understand	Prioritize	Act	Learn	Standardize

The goal is not to achieve a perfect assessment score. The goal is to build an increasingly capable operating system.

Recommended Reassessment

Reassessment is most useful when enough time has passed for meaningful changes in behaviour, systems, and operational evidence to become observable. A 90-day review can provide an initial indication of progress in many situations, while

broader management-system maturity typically requires observation over a longer period. Choose the interval based on scope, operating cadence, severity of the gap, evidence availability, and the time required for the changed condition to stabilize.

Final Reflection

1. What did this assessment reveal that we were not previously seeing clearly?

2. Where is our management system stronger than our operational evidence?

3. Where are leaders compensating personally for weak systems?

4. Which problem, if addressed, would most improve our ability to manage and improve the operation?

5. What will we do differently during the next 30 days?

Need Help Interpreting Your Results?

The purpose of this assessment is to help you identify strengths, potential gaps, and areas that may require deeper investigation. In some situations, the findings may raise questions that cannot be answered through self-assessment alone.

If you would like an independent perspective, TrueLean Solutions can help you review the results, validate key findings against operational evidence, and determine practical next steps for your organization.

- Review and interpretation of assessment results
- Gemba observation and validation of operating conditions
- Leadership and management-system review
- Operational performance and KPI analysis
- Identification and prioritization of improvement opportunities
- Development of a practical improvement roadmap

NOT SURE WHERE TO START?

You do not need to have all the answers before asking for help. The assessment is designed to identify where to look next.

REQUEST A CONSULTATION →

trueleansolutions.ca

Operational Assessments • Lean/TPS • Operational Management Systems • Business Transformation

Closing Principle

A score identifies where to look.

Evidence determines what is actually happening.

Leadership action determines what changes.

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