



Candidates should write their Accomplishment Record using these Lean Certification framework documents:

Lean Body of Knowledge (BOK) - What a lean practitioner knows

Essential Body of Work (EBW) - The work a lean practitioner does

Competency and Behavior Model - A lean practitioner's general competencies

Lean Certification Blueprint - A lean practitioner's specific competencies

The Lean Body of Knowledge is an outline of lean topics covered on the Knowledge Exams at all levels of Lean Certification. The BOK lists the Bronze, Silver, and Gold knowledge requirements.

At the Silver level, a Lean Practitioner is expected to function in an organizational role and conduct tasks described in the **Essential Body of Work (EBW)**. EBW tasks are grouped into the same categories as the **Lean Body of Knowledge (BOK)**. This document and the **Competency and Behavior Model** together help to identify minimum competencies and behavior expectations for each Certification level, including Silver. They encourage and guide actions, and they assist candidates in evaluating their readiness for Certification.

The **Lean Certification Blueprint** goes further, providing specific detail on the degree of proficiency expected for each Certification level. The Blueprint structures BOK content as Terminal Learning Objective (TLO) categories and subordinate Enabling Learning Objectives (ELO) items. All these documents are used together to evaluate Accomplishment Records. Lean Certification candidates should refer to each, using mainly the ELOs of the Lean Certification Blueprint to prepare their responses.

For purposes of this certification:

VALUE STREAM is defined as any process that has a defined customer and supplier (including internal), material flow and information flow. The process should include multiple operations or tasks that require the use of several people, machines, or equipment.

Submitting Your Accomplishment Record

To submit your Accomplishment Record, [log into your SME Customer Account](#), or create a new account, in the upper right-hand corner of the homepage ([sme.org](#)). If you need assistance, call SME Customer Care at 800.733.4763 or 313.425.3000, Monday through Friday, 8:00 a.m.–5:00 p.m.

1. After signing in, click View Your Profile (located in upper right-hand corner of the webpage).
2. Under My Account, on the left side of the webpage, click Portfolio Submission under Certification.
3. At the bottom of the webpage, click New Submissions.
4. Click Start to the right of the Accomplishment Record you are submitting (Silver).
5. Enter the Title of your submission (e.g., Lean Silver Accomplishment Record).
6. Select Lean Portfolio for the category.
7. You do not need to enter or select from Length in Minutes or Audience Level of Expertise.
8. Topic Options will automatically list the portfolio selection you made when you started your submission.
9. Primary Topic will automatically populate after selecting Topic Option.
10. For Keywords, select the keyword for the Accomplishment Record you are submitting, then Save and Continue.
11. Verify or update your personal information, then select Save and Continue, then Go.
12. In the Word text box, add a note about your Accomplishment Record (e.g., Lean Silver Accomplishment Record, first submission). Text must be entered in this field to proceed.
13. Click Choose File and select your Accomplishment Record file. Please use this naming convention for your file: CustomerID-Last Name First Name-Accomplishment Record Silver. **Do not include zeros at the beginning of CustomerID.**
14. Click Upload.
15. Type Yes in the text box to agree to the terms and conditions.
16. The Usage Questions section is not applicable for portfolios. Please make sure all questions are answered no, then click Save and Continue.
17. Verify your submission details and contact information. If everything is accurate, click Submit.

An email acknowledgement will be sent when your portfolio is received. If you do not receive an acknowledgement within 48 hours, please assume your Accomplishment Record was not received. Report any upload difficulties to certification@sme.org or call SME Customer Care at 800.733.4763 or 313.425.3000. Review of your Accomplishment Record may take up to 60 days to complete.

NOTE:

You must have passed your Lean Silver exam before you can submit your Silver Accomplishment Record.



Education, Training, and Development Documentation

Please document the lean-related education, training, and development activities in which you have participated. They may include training (public or company-sponsored), conference attendance, hands-on workshops, books, videos, etc.

The education, training, and development requirement for the Lean Silver Certification is 160 hours. If the candidate has previously obtained the Lean Bronze Certification, the 80 hours of education, training, and development is applicable to the Lean Silver Certification. This means a candidate with a Lean Bronze Certification requires just an additional 80 hours. A candidate who had not previously obtained the [Lean Bronze Certification](#) must document a total of 160 hours of education, training, and development.

Education, training, and development documentation **MUST** demonstrate continuing investment in your lean education over time. For example, if you started your lean journey in 2001, you should illustrate how you've invested in your education, training, and development from 2001 to the present.

Your education, training, and development for the Lean Silver Certification should include four (4) or more of the various categories of professional development activities listed below.

NOTE:

Each category must not exceed a total of 64 of the 160 hours required (40% of the total requirement).

CATEGORIES

Attendance	
AME or SME Chapter Meeting (meeting month/year)	1 credit per meeting
Conferences – Regional or National Lean Conferences (conference name/location/year)	4 credits per day of attendance
Authorship/Ownership	
Application for Lean Award (e.g., Shingo Prize, Best Plant) (provide award name/application date)	3.5 credits per application
Author a Published Lean Paper (provide paper title/publishing date)	3 credits per paper
Write Blog	0.5 credit per blog
Preparing Materials for Speaker (provide topic/speaker name/location/date)	0.5 credit per presentation, maximum 4 credits per year
Publish a Lean Book (provide book title/publishing date)	25 credits per book
Upload Recertification Reflection	4 credits, limit one per recertification period
Education	
College Course – Body of Knowledge Related (course name/year)	15 credits per college course (graduate) 10 credits per college course (undergraduate)
Continuing Education Units (CEU) (course name/year)	10 credits per CEU
Create Lean Training Material (provide topic/date delivered/audience)	2 credits per material creation
National or Regional Sponsored Course/Workshop/Video/Webinar – Body of Knowledge Related (topic/year)	1 credit per hour
Read a Lean Book (provide title)	4 credits per book
Submit a Written Book Review (provide review/link for reference)	2 credits per book
Teach a Lean Course (provide name of course and date delivered)	1 credit per hour of instruction
Teach the AME/Shingo Institute/SME Lean Certification Exam Prep Course (course/date)	8 credits per prep course

Continued...



Involvement	
Committee Activity (e.g., Lean Gold Certification interview team, writing articles, item writing, etc.) (activity/year)	0.5 credit per activity hour
Kaizen/Lean Event – Facilitator (event description/location/duration)	4 credits per event day
Kaizen/Lean Event – Participant (event description/location/duration)	1 credit per event day
Presenting/Co-Presenting Lean Event (lean event name/location)	1 credit per engagement
Read/Score AME/Shingo Institute Award Application/Achievement Report (business name/location/year)	4 credits per application/achievement report
Review a Lean Certification Portfolio or Accomplishment Record *must be lean certified (candidate name/month/year)	4 credits per Portfolio/accomplishment record
Proctor a Lean Exam	1 credit per exam, maximum 4 credits per year
Leadership	
Elected Officer of a Lean Organization (position/organization/year(s) of service)	8 credits per year of service
Member Leader of a Lean Organization (name of organization/year(s) of service)	5 credits per year of service
Member Who Performs Ad-Hoc Sub-Committee Responsibilities (committee/organization)	1 credit per event/activity– 24 credit maximum for ad-hoc service
Mentoring (mentee's name)	1 credit per hour, maximum of 24 credits per year
Organize a Lean Event for AME, Shingo Institute, or SME (event name/date)	4 credits per event
Go to Gemba	
Book Review for Shingo Institute or Lean Certification Recommended Reading List (provide book title)	2 credits per assessment: written report required, maximum of 4 credits per year
Lean Employment (company name/position title/duration)	2 credits per quarter, maximum of 8 credits per year
Plant/Site Assessment (company name/location)	4 credits per assessment: written report required, maximum of 8 credits per year
Plant/Facility Tour (facility name/location)	1 credit per tour, maximum of 4 tours per year
Customer Feedback	
LinkedIn, Lean Registry, or Other Documented Recommendation/Testimonial (name/position title)	0.5 credit per written recommendation/testimonial

Your total combined education, training, and development MUST include all four (4) categories of the Lean Certification Body of Knowledge (PDF):

- Cultural Enablers
- Continuous Process Improvement
- Consistent Lean Enterprise Culture
- Business Results

Indicate the parts of the Lean Certification Body of Knowledge covered in the training you've documented by placing X's in the appropriate columns of the Lean Certification Body of Knowledge categories. Please refer to the Lean Certification Body of Knowledge for the topics covered under each major category.

NOTE:

If you are including kaizen events or other “hands-on” events in this section, they may not be used for your portfolio projects. You may only count each activity or event one time within your portfolio.



Accomplishment Record Requirements and Forms

Education, Training, and Development Activities (Descriptions)	Year	Hours	Cultural Enablers	Continuous Process Improvement	Consistent Lean Enterprise Culture	Business Results
If submitting a single activity for more than 20 hours of credit, provide an outline of the course/activity, explaining its content.						
TOTAL EDUCATION, TRAINING, AND DEVELOPMENT HOURS:						



Lean Silver Certification Accomplishment Record

A form for you to highlight your experiences relevant to Lean Silver Competencies

From the Certification Oversight and Appeals Committee:

Our goal is to make you successful in your lean career. The Accomplishment Record is designed to showcase your competencies and behaviors relative to your desired category of Lean Certification in accordance with the [Blueprint Terminal Learning Objectives](#) (TLO) and associated Body of Knowledge elements. We **strongly** recommend you **read** all the TLOs associated with each competency **before** you commence your narration. This way you will determine the best way to describe your competency, even though you will not 'hit' every TLO. Each competency should be written in the form of an Executive Summary.

Date Submitted (MM/DD/YYYY)	
Name (First Last)	
Email Address	
Phone	

Instructions for describing your accomplishments relevant to Lean Silver Certification

On each of the following pages, you will be presented with a competency needed by Lean Silver professionals. For each competency, review the description and provide a narrative of your accomplishments related to the competency. In your description, please emphasize the quality of your accomplishments and results you have achieved, rather than the jobs you have held or tasks you have completed. Be sure to describe what **YOU** did rather than what the team did. The past accomplishments you describe may be specific, such as challenging assignments or projects that you successfully completed, or they may be broader examples of sustained high performance in your daily work. You should describe the quality of your accomplishment(s), including (a) how it relates to the specific competency and (b) its scope and impact.

For each accomplishment, please provide the information requested:

- Dates Activities Conducted: The start and end dates of the time period during which the activities were performed.
- Background: General statement of the situation or circumstances surrounding what you accomplished/achieved.
- Precise Description: A precise description of exactly what YOU did (the activities you performed, duties, and responsibilities).
- Outcome: The outcome, results, or long-term impact of your accomplishment(s). These outcomes may be indirect but it is important to describe such outcomes. Include the grade you received if your accomplishment was in an educational or training setting.
- Verifiers (at end): Name and contact information for two people who can either provide substantiation of your competencies or speak to your credibility.
- Relationship to Verifiers: Specify whether a verifier was your supervisor, co-worker, friend, instructor, chairman of a committee, etc. Do not use a spouse or a close relative (father, mother, etc.) or a person who is presently a direct subordinate as a verifier.

Note:

Provide names and contact information only for individuals who may be contacted by SME.



Silver Accomplishment Record Form – Example

Value Stream Perspective – (TLO7, TLO8, TLO9)

IMPORTANT: Read and understand the following before preparing your narrative

A Lean Silver professional will be able to evaluate the principles, determine the processes or systems, and apply the tools and techniques for developing and maintaining a consistent lean enterprise culture within a complete value stream. For example, he or she should be able to:

- Drive systematic thinking to build a culture that is value-stream focused.
- Ensure consistency of purpose within the lean enterprise culture.
- Integrate enterprise thinking within a value stream.
- Apply different methods of policy deployment / strategy deployment (hoshin kanri).
- Utilize an A3 process to capture knowledge and analyze the process problem and learning.
- Employ catchball to achieve a consistent strategy to achieve QCD.

Please refer to the relevant Terminal Learning Objectives in the [Silver Blueprint](#) for complete descriptions of requirements for this competency.

Please describe your accomplishments related to this competency:

Dates activities conducted From (MM/YYYY):

To (MM/YYYY):

Background: General statement of the situation or circumstances surrounding what you accomplished/achieved (10-50 words)

Project Team Lead for conversion of Dynaflo sensor line to Value Stream design, Chesapeake Sensors, Washingtonville, MD

Description of exactly what YOU did (e.g., what actions YOU took, and how it relates to this competency). Please use the Lean Silver Blueprint to cite the relevant Terminal Learning Objective (TLO) and subordinate Enabling Learning Objective (ELO) competencies that this narrative addresses. (500-800 words)

My role as Continuous Improvement Manager includes advising the company senior leadership team on the effective use of lean tools and principles, building stronger lean leadership capabilities, and on accelerating our development of a continuous improvement culture. Over three years, I have written and directed site continuous improvement plans. I also trained, advised, and coached my functional department manager peers and the company President on using lean principles and tools across strategic planning and deployment activities. I conducted leader training in hoshin kanri, coaching for performance, and lean project management. I facilitated the annual strategic planning working sessions, directed leaders to online hoshin planning workshops, and sat in on most quarterly review meetings, and I provided one-on-one and group feedback and recommendations.

I and the Operations and HR Managers led the development of cascading vision and mission statements that aligned with the higher-level company statements, which fueled measurably greater employee involvement and innovation. I designed, deployed, and audited additions to leader standard work routines, including periodic “skip level” leader discussions, and “brief-back” understanding checks to drive improvements. Together, these drove stronger message deployment and employee engagement across all departments and shifts.

The company has been on its lean journey for almost ten years, and lean has, at times, lost momentum. To help reenergize our lean efforts, I developed an approach designed to help drive discussion and action around lean principles, values, and philosophies. At weekly summary meetings at all levels, each leader tells a lean “campfire story” that describes how the leader framed an event or issue around a lean principle or value. These helped convert abstract concepts into practical examples of desirable/undesirable interpretations and behaviors. Everyone’s understanding of continuous improvement philosophies has advanced significantly, and leaders and employees.

Outcome: The outcome, results, or long-term impact of your accomplishment(s). These outcomes may be indirect but it is important to describe such outcomes. (10-100 words)

Productivity (labor hours/piece) increased by 87%. Potting quality problems (defective pieces/1000 pieces) dropped by 90% over 6 months. Freed-up floor space allowed another product family in the same facility, which wasn’t before. The value stream served as a model line for all other products’ conversion to value stream production.



Silver Accomplishment Record Form

People Transformation – (TLO1)

IMPORTANT: Read and understand these TLOs before narration

A Lean Silver professional will be able to use and apply principles of cultural enablers **within an entire organization or business**. For example, he or she should be able to:

- Demonstrate the importance of respect for the individual in lean cultures.
- Adopt the principle of humility in enabling personal and organizational learning and improvement.

Please refer to the relevant Terminal Learning sections in the [Silver Blueprint](#) for complete descriptions of requirements for this competency.

Please describe your accomplishments related to this competency:

Dates activities conducted From (MM/YYYY):

To (MM/YYYY):

Background: General statement of the situation or circumstances surrounding what you accomplished/achieved (50-75 words)

Precise Description: Description of exactly what **YOU** did (e.g., what actions **YOU** took, and how it relates to this competency) (100-200 words)

Outcome: The outcome, results, or long-term impact of your accomplishment(s). These outcomes may be indirect but it is important to describe such outcomes. (50-100 words)



Process Transformation – (TLO2 and TLO3)

IMPORTANT: Read and understand these TLOs before narration

A Lean Silver Professional will be able to demonstrate and apply the processes and implement the techniques and practices of cultural enablers for process transformation **within a complete value stream**. For example, he or she should be able to:

- Develop and apply a vision and direction for a value stream.
- Apply motivation, empowerment, and involvement processes throughout a value stream.
- Develop training needs and conduct on-the-job training for new and/or experienced employees within a value stream.
- Demonstrate the critical elements of leadership development, including motivation, coaching for performance, establishing expectations, and managing change.
- Lead the formation and management of work teams.

Please refer to the relevant Terminal Learning sections in the [Silver Blueprint](#) for complete descriptions of requirements for this competency.

Please describe your accomplishments related to this competency:

Dates activities conducted From (MM/YYYY):

To (MM/YYYY):

Background: General statement of the situation or circumstances surrounding what you accomplished/achieved (50-100 words)



Process Transformation – (TL02 and TL03)

Precise Description: Description of exactly what **YOU** did
(e.g., what actions **YOU** took, and how it relates to this competency) (500-750 words)

Outcome: The outcome, results, or long-term impact of your accomplishment(s). These outcomes may be indirect but it is important to describe such outcomes. (50-100 words)



Leading (Orchestrating) the Application of Tools – (TLO4, TLO5, TLO6)

IMPORTANT: Read and understand these TLOs before narration

A Lean Silver professional will be able to describe and apply the basic principles and philosophies, systems, techniques, tools, and practices of continuous process improvement and improvement systems **within a complete value stream**. For example, he or she should be able to:

- “See” the wastes through gemba visits, and orchestrate tools and techniques to eliminate barriers to flow throughout a complete Value Stream
- Create methods and systems to ensure autonomation (jidoka) throughout a complete value stream.
- Implement scientific thinking as a thought process through experimentation and experimental learning.
- Recognize and apply techniques for error prevention and detection within a complete value stream.
- Synchronize daily goals to customer demand for a complete value stream.
- Direct and apply the right tools and techniques necessary to assure PDCA for the current and future state for a complete value stream.

Please refer to the relevant Terminal Learning sections in the [Silver Blueprint](#) for complete descriptions of requirements for this competency.

Please describe your accomplishments related to this competency:

Dates activities conducted From (MM/YYYY):

To (MM/YYYY):

Background: General statement of the situation or circumstances surrounding what you accomplished/achieved (50-100 words)



Leading (Orchestrating) the Application of Tools – (TL04, TL05, TL06)

Precise Description: Description of exactly what **YOU** did (e.g., what actions **YOU** took, and how it relates to this competency) (1000-1750 words)



Outcome: The outcome, results, or long-term impact of your accomplishment(s). These outcomes may be indirect but it is important to describe such outcomes. (100-200 words)



Value Stream Perspective – (TL07, TL08, TL09)

IMPORTANT: Read and understand these TLOs before narration

A Lean Silver professional will be able to evaluate the principles, determine the processes or systems, and apply the tools and techniques for developing and maintaining a consistent lean enterprise culture within a complete value stream. For example, he or she should be able to:

- Drive systematic thinking to build a culture that is value-stream focused.
- Ensure consistency of purpose within the lean enterprise culture.
- Integrate enterprise thinking within a value stream.
- Apply different methods of policy deployment / strategy deployment (hoshin kanri).
- Utilize an A3 process to capture knowledge, and analyze the process problem and learning.
- Employ catchball to achieve a consistent strategy to achieve QCD.

Please refer to the relevant Terminal Learning sections in the [Silver Blueprint](#) for complete descriptions of requirements for this competency.

Please describe your accomplishments related to this competency:

Dates activities conducted From (MM/YYYY):

To (MM/YYYY):

Background: General statement of the situation or circumstances surrounding what you accomplished/achieved (50-100 words)



Value Stream Perspective – (TL07, TL08, TL09)

Precise Description: Description of exactly what **YOU** did (e.g., what actions **YOU** took, and how it relates to this competency) (500-800 words)

Outcome: The outcome, results, or long-term impact of your accomplishment(s). These outcomes may be indirect but it is important to describe such outcomes. (100-200 words)



Measure What Matters – (TLO10, TLO11, TLO12)

IMPORTANT: Read and understand these TLOs before narration

A Lean Silver professional will be able to describe and apply the principles of business results and measurement systems, and apply key lean-related measures within a complete value stream. For example, he or she should be able to:

- Analyze and understand what matters to the customer in order to align, streamline, and simplify work processes.
- Diagnose normal conditions vs. abnormal conditions to trigger the correct response.
- Align internal measures that matter to the customer.
- Design metrics and measure the results from the whole system to maximize value.
- Apply methods of visible feedback in real time to communicate information.
- Analyze the total cost in the lean process to identify opportunities to eliminate waste.
- Analyze the financial impact that the lean process has on daily operations.

Please refer to the relevant Terminal Learning sections in the [Silver Blueprint](#) for complete descriptions of requirements for this competency.

Please describe your accomplishments related to this competency:

Dates activities conducted From (MM/YYYY):

To (MM/YYYY):

Background: General statement of the situation or circumstances surrounding what you accomplished/achieved (50-100 words)



Measure What Matters – (TLO10, TLO11, TLO12)

Precise Description: Description of exactly what **YOU** did (e.g., what actions **YOU** took, and how it relates to this competency)
(500-1000 words)



Measure What Matters – (TLO10, TLO11, TLO12)

Outcome: The outcome, results, or long-term impact of your accomplishment(s). These outcomes may be indirect but it is important to describe such outcomes. (100-200 words)



Accomplishment Record Declaration

The responses I have provided on this form are truthful and accurate to the best of my knowledge. I understand that SME may contact individuals listed below to verify the accuracy of my statements and/or my credibility. I understand that if my statements are deemed to be untruthful I will be subject to removal from the process.

Your Name		Your Signature	
Phone		Email	
Name and title of person (1) who can verify your accomplishment or credibility			
Verifier relationship to you (e.g., supervisor, co-worker)			
Verifier contact information, including email, phone, and mailing address			
Name and title of person (2) who can verify your accomplishment or credibility			
Verifier relationship to you (e.g., supervisor, co-worker)			
Verifier contact information, including email, phone, and mailing address			