

# 3F CHECKLIST - THE 3F METHOD (1 page)

FACTS -> LEAN FILTER -> FORM - a simple worksheet for escaping false A/B choices

Use it when both options feel expensive or risky - cost versus service, inventory versus stockout, speed versus quality - and you want to surface a Third Way that solves the issue without moving waste elsewhere.

## 1) FACTS - frame the dilemma without opinion

- Write the problem in one line, in flow terms: what stops, piles up, loops back, or waits.
- Describe A and B as experiments: what changes, what is at risk, what gets measured.
- Choose no more than 3 decision measures, such as lead time, OTIF, defects, WIP, utilization, or inventory.
- Identify the current constraint: what point is limiting the system's result right now?
- Define the scope: which product, order, lane, or process are you discussing?

## 2) LEAN FILTER - change perspective with one lens

- Use one lens at a time. If it does not reveal a better path, change lens instead of stacking them.
- Value: what would the customer willingly pay for, and what would they never pay for?
- Flow: where does the process break, queue, or create rework?
- Pull: how can work start only when needed, through a clear signal?
- Built-in quality: how do you stop the error before it moves to the next step?
- Standard work: what is the best known method today, and how do you make it repeatable?
- PDCA: what hypothesis are you testing, and how will you verify it quickly?

## 3) FORM - shape the Third Side through simplification

- Remove before you add: cut steps, controls, exceptions, waiting time, and useless movement.
- Turn urgency into a rule: define explicit priority and a limit to WIP.
- Reduce visible variation: standardize inputs, sequences, load units, and information.
- Design a signal: kanban, supermarket, pacemaker, delivery window, or release rule.
- Make the abnormal visible at once: andon/log, stop-the-line, or poka-yoke where errors are frequent or costly.

## DECISION GATE - is it really a Third Side?

- It removes net waste instead of relocating it.
- It reduces complexity: fewer exceptions, less coordination, less manual handling.
- It improves flow: shorter or more stable lead time, lower WIP, fewer loops.
- It can be explained in two sentences and repeated by the people doing the work.
- It has a real verification test within 7-14 days.

## MINI TEMPLATE

- Problem (1 line): \_\_\_\_\_
- Option A (pros/cons): \_\_\_\_\_
- Option B (pros/cons): \_\_\_\_\_
- Constraint: \_\_\_\_\_
- Lean lens chosen: \_\_\_\_\_
- Proposed Third Side: \_\_\_\_\_
- Verification measures: \_\_\_\_\_
- Test window: \_\_\_\_\_
- Standard to update if it works: \_\_\_\_\_