

Process Improvement - Template

Step 1: INITIATE PROJECT

What is the project's purpose?	
What is the problem / opportunity of this initiative?	
Why are we doing it this way today?	
What are the impacts/benefits to other departments and or stakeholders?	
How will you know if things get better? (What are the results you are trying to achieve?)	
What is your plan for this project?	

ADDITIONAL NOTES:

Step 2: DEFINE CURRENT SITUATION

What is the history of the problem?	
Can the problem be depicted in a sketch or flowchart?	
What occurs when the problem appears? What are the symptoms? Where and when do symptoms appear?	
How often does this problem occur?	
What are the "current" baseline metrics being observed?	
Who is and who is not involved?	
What is working in the current step and what needs improvement moving forward?	

ADDITIONAL NOTES:

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STEP 3: IDENTIFY ROOT CAUSES

What were the possible causes of the symptoms identified in Step 2?	
Which of these symptoms are verified by data?	
Are there deeper causes (of the verified causes?)	
How does verifying the causes affect decisions about who should be working on this initiative?	
What is working in the current step and what needs improvement moving forward?	

ADDITIONAL NOTES:

STEP 4: DEVELOP SOLUTIONS

What solutions were considered that addressed the causes verified in Step 3?	
What "criteria" was useful for comparing potential solutions?	
What are the pros and cons of each solution? Which solution seems best?	
How will you try them on a small scale? What data will you collect?	
Are there problems to implement the solution full-scale?	
What is working in the current step and what needs improvement moving forward?	

ADDITIONAL NOTES

STEP 5: DEFINE MEASURABLE RESULTS

How well did the results meet the targets for this project?	
How well was the plan executed?	
What challenges did you face? What worked and what would you do differently?	
What is working in the current step and what needs improvement moving forward?	
NOTE: Did you meet your expected baseline metrics?	

ADDITIONAL NOTES

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STEP 6: STANDARDIZE PROCESS

(In the future), what new standard method or product will be put in place?	
How will you train employees?	
What's shall be put in place to ensure that the gains are maintained? (To prevent backsliding)	
What will we monitor regularly to ensure the change process is still working properly and effective?	
Have you established a date/timeline for conducting BPI lessons learned?	
(In the future), once the solution has been implemented, what is working and what needs to be improved?*(PDCA cycle)	

ADDITIONAL COMMENTS

STEP 7: DETERMINE FUTURE PLANS

What remaining needs were not addressed by this project?	
What are your recommendations for investigating these remaining needs?	
What did you learn from this project?	
How can these lessons learned be communicated?	
How will the documentation be completed? What happens to it when it is finished?	
How will this project be brought to a close?	
How will you celebrate?	

ADDITIONAL COMMENTS