

Date XX/XX/XXXX

## Project Name of Project

### Team

**Sponsor:** [Project Sponsor's Name]

**Team Lead:** [Dept Lead's Name]

**CII Facilitator:** [CII Lead's Name]

**Improvement Team:**

[List names here]

**Resources:**

[List names here]

### Problem Statement

[Craft a clear, concise problem statement that briefly states: where and when (how long) the problem is occurring; the size or magnitude of the problem; why it's a problem/the impact; and who the customers are (who is impacted). A problem statement is not a question, not a proposed solution, nor an unactionable complaint. If your statement has a question mark or solution in it, you're not done!]

### Scope

- [The scope should detail the start and end of the process. It can also clarify the level of depth for the project.]

### Targeted Outcomes

- [Use SMART goals where possible as targeted outcomes for the project.]
- [A few of the goals can be more qualitative/long term/strategic.]
- [These targets should be your standard for determining whether or not the project was a success.]

### Stakeholders

**Customer:**

[The direct recipient of the output from this process. The single individual/category of individuals for whom we will design this process]

**Other Stakeholders:**

[List categories of stakeholders here]

### Boundaries

- [Be very selective of what you consider a boundary – question thoroughly before you agree to include one.]
- [Boundaries are completely off limits – when a project starts drifting in the direction of a boundary we must pivot in another direction.]
- [Boundaries could include politically unfeasible options, parts of the process that we don't want to address, or other resource constraints.]



### Timeline

[time range] (Prep) [specific dates] (Event) [time range] (Implementation)

# Project Checklist

## 1. initiate

- Identify an area for improvement
- Develop a charter
  - Stakeholder analysis
  - Establish a project team
  - Craft a clear problem statement
  - Consider the context
  - Set well defined scope, goals, and boundaries
- Mitigate project risk
- Communicate the vision and approach to key stakeholders
- Obtain leadership buy in-create urgency & strong coalition
- Establish project management framework (e.g. Kanban)

## 3. improve

- Conduct structured brainstorming activity
- Evaluate and prioritize potential solutions
- Develop a future state map or business model
- Gain sponsor buy in for improvement approach
- Do small tests of the future state - iterate
- Develop lock-in mechanisms and mistake proofing
- Develop a business case for the change
- Obtain formal sponsor approval of recommendations
- Develop communications plan specific to proposed improvements – lead with a story
- Communicate intended approach to all stakeholders
- Address emergent concerns from stakeholders
- Work with management to remove obstacles to implementation – obtain resources and set schedule

## 2. investigate

- Create a current state baseline (process map, performance measures, #s that indicate action when they change, etc.)
- Explore customer perspective (Value Proposition Canvas)
- Document and challenge underlying assumptions
- Determine operational definitions for key terms
- Communicate with all stakeholders to determine unforeseen impacts
- Collect and analyze data
- Investigate and observe actual circumstances (visit physical locations, focus on actual occurrences of problems)
- Perform a root causes analysis – RCA (yep... causes)
  - Perform bright spot analysis (positive RCA)
- Optional – Failure Modes and Effects
- Note parking lot or out of scope issues for future efforts

## 4. implement

- First, execute any “just do it” or quick win opportunities
- Hold implementation kickoff meeting with stakeholders
- Develop, implement, and evaluate pilot
- Make necessary adjustments with stakeholder input
- Develop and execute full-scale implementation
- Develop operational training and control documents
- Produce deliverables/future state
- Monitor implementation/measure against goals - Dashboard
- Validate effectiveness of proposed solutions
  - Iterate if necessary
- Communicate the project impact to stakeholders
- Celebrate the success with your team – Publicly!
- Document project success and lessons learned
- Do it all again! – **iterate!!**