

Operational Improvement Plan Template

Name

Date

Background

- **Why is this important?**
- **Why should the reader care about this situation and be motivated to participate in improving it?**

Assessment Questions

1. Is there a clear theme?
2. Is the topic relevant to the organization's objectives?
3. Is there any other reason for working on this topic (e.g., learning purposes)?

Current Condition

- **How do things work today?**
- **What is the problem? Note: Do not put the solution in the problem statement.**
- **Baseline Metrics?**

Assessment Questions

1. If there was a video of the problem, what would we see and hear?
2. How could the current condition be made clearer for the audience?
3. What is the actual problem in the current condition?
4. Are the facts of the situation clear, or are there just observations and opinions?
5. Is the problem quantified in some manner or is it too qualitative?

Goal / Target Condition

- **What outcomes are expected for what reasons?**
- **What changes in metrics can be plausibly expected?**

Assessment Questions

1. Is there a clear goal or target?
2. What, specifically, is to be accomplished?
3. How will this goal be measured or evaluated?
4. What will improve, by how much, and when?

Root Cause Analysis

- **Go to the work site and study the problem first hand.**
- **Make illustrations, take a picture, or provide detailed descriptions of the current conditions to study the problem more closely.**
- **What is the root cause(s) of the problem?**
- **Use a simple problem analysis tool (e.g., 5 why's, fishbone diagram, cause/effect network) to show cause-and-effect relationships.**

Assessment Questions

1. Is the analysis comprehensive?
2. Is the analysis detailed enough and did it probe deeply enough on the right issues?
3. Is there evidence of proper five-whys thinking about the true cause?
4. Has cause and effect been demonstrated or linked in some manner?
5. Are all the relevant factors considered (human, machine, material, method, environment, measurement, and so on)?
6. Do all those who will need to collaborate in implementing the countermeasures agree on the cause/effect model reasoning?

Confirmation (Results)

- **Actual result of each countermeasure (experiment).**
- **What happened?**

Assessment Questions

1. How will you measure the effectiveness of the countermeasures?
2. Has actual performance moved line with the goal statement?
3. If performance has not improved, then why? What was missed?

Follow-up (Actions)

- **What have we learned that does or does not improve the situation?**
- **In the light of the learning, what should be done?**
- **How should the way we work or our standards be adjusted to reflect what we learned?**
- **What do we need to learn next?**

Assessment Questions

1. What is necessary to prevent recurrence of the problem?
2. What remains to be accomplished?
3. What other parts of the organization need to be informed of this result?
4. How will this be standardized and communicated?