



Process Improvement Project Charter

Use this fillable/savable charter to plan and communicate all key elements of your process improvement project. Start by entering the information you know right now. Add more info as your planning unfolds.

Date this charter was created
mm/dd/yyyy

Date of most recent revision
mm/dd/yyyy

1. BACKGROUND

What process is this project aiming to improve?

Why is this project being undertaken?

What are the top three goals for this project?

1.
2.
3.

2. KEY CONTACTS

Name	Title and Div-Dept-Office	Email	Phone
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Project Sponsor(s) – Establishes the need for the project, ensures that it aligns with top priorities, clarifies the scope, communicates with other areas, provides ongoing support and needed resources, and removes barriers

Session Facilitators – Guide the team during all of its improvement sessions

Logistics Contact – Handles operational details and logistics relating to the project and team sessions

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Data Lead – Takes the lead in gathering, analyzing, and compiling data in advance of the project (see page 3)

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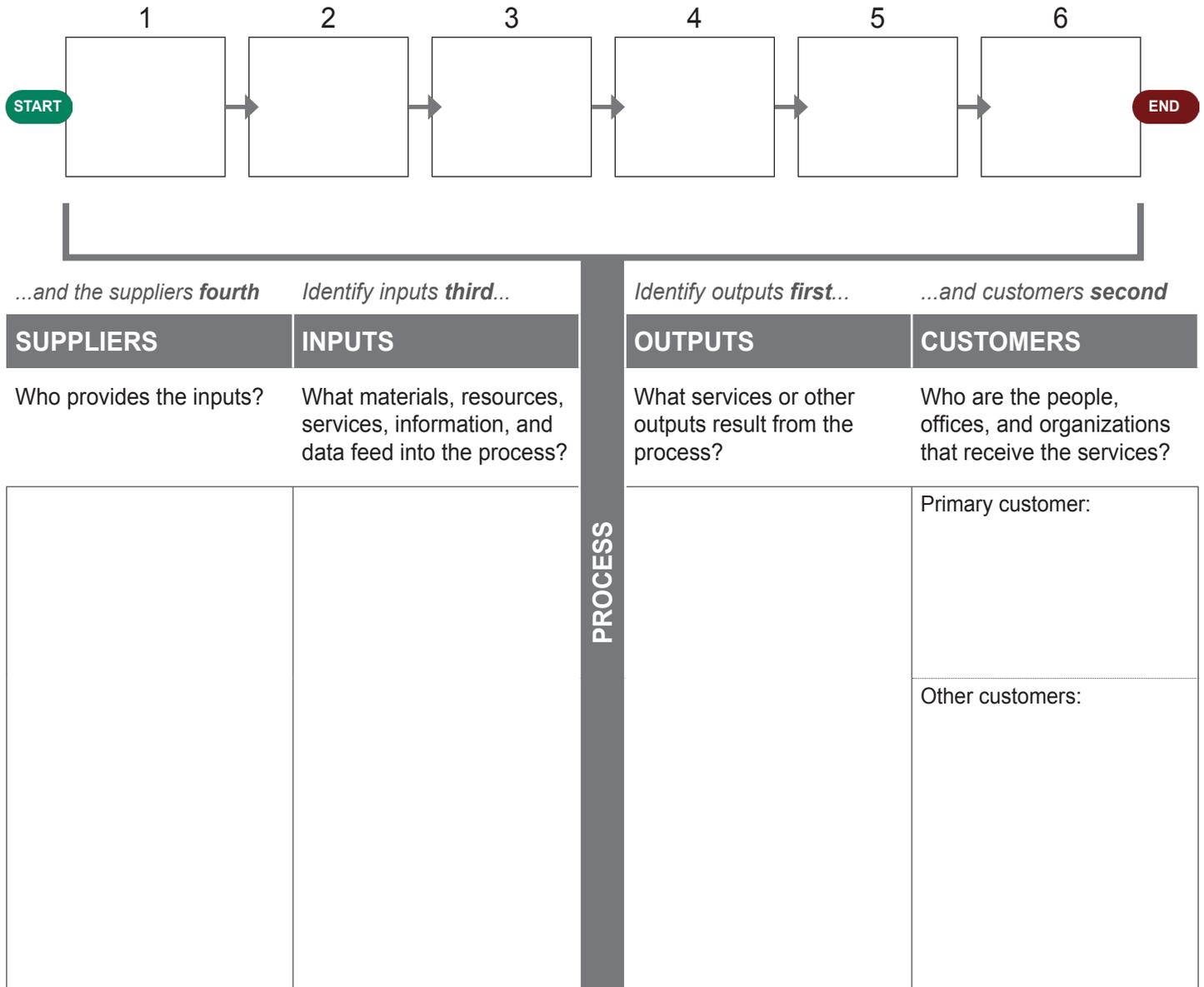
Project Manager – Immediately following the team's improvement sessions, this person coordinates implementation, ensures that the project stays on track, tracks baseline measures and projections against actual results, and so on

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3. PROCESS OVERVIEW

A **SIPOC diagram** provides a high-level, beginning-to-end view of the process – and it shows the relationships between suppliers and inputs, and outcomes and customers. When developing a SIPOC, start by developing a macro flowchart with a maximum of six steps, with each step phrased as a verb-noun action statement. (Use the template below.) Next, identify the outputs, customers, inputs, and suppliers – in that order. (Again, type directly in the boxes.) This early “define” step will help scope the project while uncovering many of the factors that feed into and flow out of the process. The team will review this SIPOC in detail at the start of its improvement event.



Notes:

4. KEY METRICS

*Not all of these metrics will be available or applicable.
Provide relevant numbers that are timely and accurate.*

Category	Metric	Current (baseline)
COUNTS	Customers – Number of customers per year	
	Production – Number of completed units per year	
	Backlog – At the time of study, the number of units that are waiting to enter the process	
	Work in process – At the time of study, the number of units currently being processed	
	Staff – Number of people who work in the process	
	Other “count” measure (if applicable) Describe:	
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TIME METRICS	Lead time – Total start-to-finish process time from the customer’s perspective, including waiting time, for a given time period – i.e., the total time the customer is waiting for an item to be delivered. Lead time is what the customer experiences. Expressed as an average, often in days.	
	Best and worst completion times – The shortest (best) and longest (worst) time to complete the process for a given time period, from the customer’s perspective. Expressed as a range.	
	Cycle time (AKA touch time) – Time to complete <u>minus</u> the waiting time and delays – i.e., time spent actually working to process the item. Compared to lead time (which is what the customer experiences), cycle time is a more mechanical measure of process capability.	
	Other “time” measure (if applicable) Describe:	
COST METRICS	Direct costs – Amounts spent annually for items and services required for the process. Examples include paper, envelopes, printing, postage, scanning expense, storage expense, etc. List items with estimated annual cost.	
		\$
		\$
		\$
		\$
		\$
QUALITY METRICS	Rework rate – Percent of units of work in process that need to be redone	
	Voice of the customer – Qualitative or quantitative data from surveys; focus-group input; number of complaints, nature of complaints; thank-you notes; or other feedback. Describe below.	
ADD’L METRICS		



6. LOGISTICS

Will this be a blitz project or a multi-session project?

Blitz Project (5 workdays in a row) **Multi-Session Project** (3-4 team sessions, each lasting 1-2 days)

Date, time, and location for **pre-event briefing** with team:

Blitz Project – Event Schedule

Date, time, location

Session equipment and supplies:

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Multi-Session Project – Event Schedule

Date:	Time:	Location:

Date, time, and location for team **report-out presentation**:



Date, time, and location for **first follow-up session**:

Date, time, and location for **second follow-up session**:

7. ADDITIONAL INFORMATION

Describe any boundaries that the team needs to be aware of, such as rules, regulations, policies, laws, etc.

If efforts have been made to improve the process over the past couple of years, describe them and the results.

What are some potential roadblocks that might impede the team and the implementation of its improvements?

Provide any additional information here:



NOTES



A large, empty rectangular box with a thin black border, occupying the majority of the page. This area is intended for the user to write their notes.