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| Subject | Give your project a name. | | Date: Put the date in this box. | |
| Background | In a few sentences, (1) describe the process selected and its purpose, (2) explain why this project is a priority now, (3) outline the cost to the organization or staff of the current condition (this could be time, confusion, stress, dollars, etc) and (4) note any other important details about the current situation. | | | |
| Targets | Create a bullet list of 3-5 goals. How will the team know they have succeeded? If possible, be specific with the metric and the timeline desired. Do not include ‘solutions’. | | | |
| Boundaries | Detail the focus of the kaizen: what is in scope and what is out of scope. (1) Start and end of the process. (2) Specify cases that may be relevant but should not be included at this time. (3) Consider limits relating to code changes, budget impact, IT systems, and/or other department involvement. | | | |
| Timeline | Leadership Training: Put the date here. | Team Training: Put the date here. | | Kaizen: Put the date here. |
| The Team | **Sponsor:** Manager(s) leading this project with decision making authority.  **Team Go-To Person:** Person on the kaizen team who provides the facilitator with a communication link to the sponsor or other on-call members as well as logistics help.  **Team members:** Process subject matter experts. Typically, no more than 9 members who cover the entire process and represent all important partner departments.  **On-Call members:** People who do not need to be part of the core kaizen team, but might be called for information or questions during the kaizen work. We identify them up-front so that they know about the possibility of their involvement in the work. | | **Stakeholders:**  Who is impacted by the process or who can impact the process? These are usually listed as departments, not specific people. | |

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