Plan, try, check, then decide

In Lean: PDCA worksheet

Page 1: Plan

Every change to how work is done is a guess about cause and effect until something checks it. Write down what you expect before you try.

Who and when

Team _____ **Owner of this cycle** _____ **Date** _____

The problem and its cause

What should happen, and what happens instead?
Facts someone could check. No names.

_____

_____

What is the cause you can change?
From your 5 Whys: a rule, a tool, an owner or missing information, never a person.

_____

Should this step exist? (in Lean: eliminate before you improve or automate)

Test the step the cause sits in: who uses what it produces, what would happen if it stopped, has it ever changed the outcome, and what really requires it?

Which step does the cause sit in?

_____

Should this step exist?
Tick one.

☐ No, remove this step. ☐ Yes, keep this step.

What is the reason?

_____

Which is the first option on this list that answers the cause?
Go down from the top and stop at the first one that works. Tick one.

☐ Remove the step In Lean: eliminate.
☐ Join two steps into one In Lean: combine.
☐ Change the order, the timing or who does it In Lean: rearrange.
☐ Make what stays lighter In Lean: simplify.
☐ Then automate what is left Only once the step is as small as it can be.

The change (in Lean: countermeasure)

What exactly will change, and where will you try it first?
Small scale: one team, one form, one type of request. Change one thing at a time where you can.

_____

_____

Who puts it in place _____ **Start date** _____

What we expect, written before we try (in Lean: prediction)

Specific enough that a check could prove it wrong.

What do we expect to see change?
Something in the work: a queue, a returned form, a request that no longer arrives.

_____

_____

How will we see it?
Use the measure you already have. If you noted how often it happens and how long it takes, predict in those terms. If not, name something you can observe. Do not invent a number.

_____

By when should we see it?

_____

Which result would show we were wrong?

_____

A prediction is not a saving. Only the check tells you what happened.

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Page 2: Do, Check, Act

Do: try it

What did we actually do, when, and where?

What did not go as planned?

Check: what happened? (in Lean: check)

Look at what the prediction named, in the work itself, at about a week, two weeks and a month. Impressions are a poor guide.

When	Date	Did it hold? *held / partly / reverted*	What did we see in the work?
Day 7			
Day 14			
Day 30			

Did what we predicted happen?

Compare with page 1, not with how people feel about the change. If it partly held, where does it not work?

Act: decide

What do we do now?

Tick one.

- ☐ Adopt: make it the normal way of working It held. Write it down with the standard work template.
- ☐ Adjust: change it and run another cycle It partly held. Aim the next change at the part that did not.
- ☐ Abandon: go back to the cause with what we learned It did not hold, or the old way came back.

What did we learn, and what is the next cycle?

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