SIMPLICITYHUB™ PREMIUM TOOLKIT

PRACTICAL PACK · FIELD TESTED

DMAIC Project Template Pack

Every template across Define, Measure, Analyse, Improve and Control — each with a completed example and a blank version ready for your own project.

BUILT FOR

Lean Six Sigma practitioners, CI managers, project leads and improvement teams.

YOU WILL LEAVE WITH

A complete reference pack so every DMAIC project at your site runs the same disciplined way.

WHAT'S INSIDE

01	DEFINE	Frame the problem, scope and stakeholders
02	MEASURE	Quantify the current state with credible data
03	ANALYSE	Find and validate the true root causes
04	IMPROVE	Design, pilot and implement the solution
05	CONTROL	Lock in the gains and hand the process over

WHAT'S INSIDE

Contents

Each stage section opens with a short overview, then gives every template in that stage — a description, why we use it, the benefits it brings, a completed example to learn from, and a blank version for you to use.

For downloadable templates go to https://www.simplicityhub.co.uk/templates.html
For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

INTRODUCTION

How to use this guide

DMAIC — Define, Measure, Analyse, Improve, Control — is the structured improvement method behind Lean Six Sigma. Each stage has a clear purpose, and every template in this guide supports a specific decision or piece of evidence within that stage.

For every template you will see three things in sequence:

1 **What it is & why we use it**
A short explanation of the template's purpose and the benefits it brings.

2 **A completed example**
A realistic worked example so you can see how the template should look when filled in well.

3 **A blank version**
The same template with the fields empty, ready for you to use on your own project.

THE FIVE STAGES

DEFINE
The Define stage establishes what we are solving and why. It locks down the problem, the goal, the scope, the team and how we will communicate. A weak Define stage almost always leads to scope creep, stakeholder push-back and projects that solve the wrong thing.

MEASURE
The Measure stage replaces opinion with evidence. We define the process, decide what to measure, check that our measurement is trustworthy, then capture a baseline. Without a credible baseline, you cannot prove improvement later.

ANALYSE
The Analyse stage moves from symptoms to causes. We brainstorm possible causes, narrow them down, then validate which ones actually drive the problem using data. Skipping validation here is the single biggest reason improvement projects fail to stick.

IMPROVE
The Improve stage turns insight into action. We generate solutions, prioritise them by impact and effort, pilot the strongest options, then roll them out with a clear plan. Good Improve work is disciplined — not a rush to implement the first idea.

CONTROL
The Control stage protects the improvement. We standardise the new way of working, monitor key metrics, build escalation routes, and formally hand the process to the business. Without Control, processes drift back to baseline within months.

STAGE 01 OF 05

DEFINE

Frame the problem, scope and stakeholders

The Define stage establishes what we are solving and why. It locks down the problem, the goal, the scope, the team and how we will communicate. A weak Define stage almost always leads to scope creep, stakeholder push-back and projects that solve the wrong thing.

TEMPLATES IN THIS STAGE

10 templates

The pages that follow take each define template in turn. Read the description, the rationale and the benefits; study the completed example; then use the blank version to apply it to your own project.

TEMPLATE 01 OF 10 · DEFINE

BUSINESS CASE

WHAT IT IS

A Business Case summarises why a project is worth doing. It presents the problem, the proposed solution, the expected costs and benefits, and a clear recommendation for decision-makers.

WHY WE USE IT

A Business Case justifies why a project should be funded and resourced. It links the problem to financial, operational or strategic value so leaders can make an informed go/no-go decision.

BENEFITS

- Forces a clear value statement before time and budget are committed
- Aligns sponsors and finance on expected return
- Becomes the reference point for benefits tracking in Control

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

BUSINESS CASE

Present the rationale and evidence for... BUSINESS CASE

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				
This business case recommends a...					
CURRENT SITUATION			What is happening now and why...		
Since Q3 2025					
PROPOSED SOLUTION			What will you do and how?		
Redesign the end-to-end complaint...					
COST ANALYSIS			List all costs associated with...		
Cost Item	One-off Cost	Annual Cost	Notes		
Project management time	£7,200	—	PM at £200/day — internal resource		
Process redesign workshop	£500	—	One-day session with core team		
CRM configuration and template updates	£300	—	IT resource: 1.5 days at £200/day		
Agent training materials and...	£200	—	Design and delivery: 0.5 day PM time		
Contingency (10%)	£820	—	10% of total project cost		
BENEFIT ANALYSIS			List expected benefits — quantify...		
Benefit		Annual Value	Type	Notes	
Reduction in repeat complaint handling		£18,000	Cash	15 repeat contacts eliminated...	
Reduced escalation management time		£6,240	Cash	2 hrs/wk director time saved at £60/hr	
Improved customer retention		£220,000	Cash	5% churn reduction on £4.4M annual...	
Reduced re-work and complaint...		£4,200	Cash	3 hrs/wk agent time saved at £15/hr...	
Regulatory risk reduction		Non-cash	Non-cash	Lower escalation rate reduces...	
RISK SUMMARY			Key risks and mitigations summary		
Primary risks: agent resistance to...					
RECOMMENDATION			What are you asking the sponsor...		
Proceed with the project as defined.					

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BLANK TEMPLATE

BUSINESS CASE

BUSINESS CASE

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

EXECUTIVE SUMMARY

CURRENT SITUATION

PROPOSED SOLUTION

COST ANALYSIS

Cost Item	One-off Cost	Annual Cost	Notes

BENEFIT ANALYSIS

Benefit	Annual Value	Type	Notes

RISK SUMMARY

RECOMMENDATION

TEMPLATE 02 OF 10 · DEFINE

COMMUNICATION PLAN

WHAT IT IS

A Communication Plan ensures the right people receive the right information at the right time. It prevents surprises and keeps stakeholders informed and engaged throughout the project.

WHY WE USE IT

A Communication Plan defines who needs to hear what, when and through which channel. It prevents the most common project failure mode: stakeholders feeling blindsided or left in the dark.

BENEFITS

- Removes ambiguity over who tells whom what
- Builds trust through predictable, timely updates
- Catches resistance early when there is still time to address it

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

COMMUNICATION PLAN

Ensure the right people receive the right information at the right time. COMMUNICATION PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS COMMUNICATION PLAN?

A Communication Plan ensures the right people receive the right information at the right time. It prevents surprises and keeps stakeholders informed and engaged throughout the project.

Stakeholder / Group	Key Message / Update	Channel	Frequency	Owner	Notes / Status
Executive Sponsor (Sarah Mitchell)	Project status, risks and key decisions requiring approval	1:1 meeting	Monthly	James Carter	30-min standing meeting; escalation route for blockers
Core project team	Progress against plan, tasks, actions and blockers	Team meeting	Weekly	James Carter	Monday 9am; shared action log kept in Teams
Customer Service agents	Changes to complaint process and what it means for them	Team briefing	Bi-weekly	Sarah Ahmed	Team leads cascade to all shift patterns
IT team (Tom Barker)	Technical requirements, design sign-off and testing milestones	Email + meeting	As needed	Tom Barker	Minimum 2 weeks' notice before any IT change required
QA / Quality (Louise Chen)	Quality metrics, compliance requirements and process sign-off	Steering update	Monthly	James Carter	Monthly pack shared 3 days in advance
Finance team	Cost tracking, spend to date and ROI progress	Email report	Monthly	James Carter	Month-end; aligned to finance reporting cycle
All staff (wider business)	Project awareness — what is changing and when it will go live	Email newsletter	Start and close	James Carter	Keep brief; one-page summary format
Customers (external)	No direct communication — internal improvement project	N/A	N/A	N/A	Customer impact will be felt through faster complaint resolution

BLANK TEMPLATE

COMMUNICATION PLAN

COMMUNICATION PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Stakeholder / Group	Key Message / Update	Channel	Frequency	Owner	Notes / Status

TEMPLATE 03 OF 10 · DEFINE

GOAL STATEMENT

WHAT IT IS

A Goal Statement defines the measurable outcome of your improvement project. Using the SMART format, it sets a clear target, baseline, deadline and measure of success.

WHY WE USE IT

A Goal Statement turns the problem into a specific, measurable target with a date. It is the yardstick the project will be judged against.

BENEFITS

- Forces discipline — vague goals produce vague results
- Gives the team a single, shared definition of success
- Makes benefits tracking trivial — you either hit the target or you don't

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

GOAL STATEMENT

Set a measurable, time-bound target for your improvement project. GOAL STATEMENT

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS GOAL STATEMENT?

A Goal Statement defines the measurable outcome of your improvement project. Using the SMART format, it sets a clear target, baseline, deadline and measure of success.

S SPECIFIC — What PROCESS will be improved? Be precise — name the process, not a theme

Customer complaint handling process

M MEASURABLE — What METRIC will be tracked? Choose one primary measure of success

Average complaint response time (days from receipt to resolution)

M	MEASURABLE — FROM — current	Current state — include source of
5.2 days (Q3 2025 average, CRM data)		

A ACHIEVABLE — TO — target state The specific target — quantified and realistic

3.0 days or less — aligned to the published customer SLA target

T	TIME-BOUND — BY WHEN?	A specific date, not 'ASAP'
23 Jun 2026 (end of 12-week improvement project)		

M	MEASURABLE — HOW will it be MEASURED?	System, method, owner and frequency
CRM system — average of (complaint closed date minus opened date), reported weekly by the team leader		

S SPECIFIC — What is EXCLUDED from this goal? State what is out of scope to prevent drift

Complaint prevention initiatives; IT infrastructure investment; changes to staffing headcount

COMPLETED SMART GOAL STATEMENT

Reduce the average customer complaint response time from 5.2 days to 3.0 days or less by 23 Jun 2026, as measured by CRM closed-date minus opened-date reported weekly. This project excludes complaint prevention initiatives, IT infrastructure investment and staffing headcount decisions.

BLANK TEMPLATE

GOAL STATEMENT

GOAL STATEMENT

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

S

M

M

A

T

M

S

COMPLETED SMART GOAL STATEMENT

TEMPLATE 04 OF 10 · DEFINE

PROBLEM STATEMENT

WHAT IT IS

A Problem Statement clearly defines what is wrong, where it occurs, when it happens, who is affected and what the impact is — without jumping to solutions. It aligns the team on what you are solving.

WHY WE USE IT

A Problem Statement describes what is wrong, where, how much, since when and what the impact is — without jumping to solutions or causes. It is the foundation every later tool builds on.

BENEFITS

- Stops teams jumping to solutions before understanding the issue
- Quantifies pain so the project earns priority and resources
- Anchors scope — anything outside the statement is out of scope

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PROBLEM STATEMENT

Define the problem before jumping to solutions. PROBLEM STATEMENT

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS PROBLEM STATEMENT?

A Problem Statement clearly defines what is wrong, where it occurs, when it happens, who is affected and what the impact is — without jumping to solutions. It aligns the team on what you are solving.

1. WHAT is the problem? What is wrong? What is happening that should not be?

Complaint response times are consistently exceeding the 3-day SLA target across all contact channels.

2. WHERE does it occur? Which process, area, system, team or location?

Customer Service team — all channels (phone, email and online web form). Highest failure rate in the email and online channels.

3. WHEN does it occur? How often? Any trends, patterns or triggers?

Ongoing since Q3 2025. Average response time of 5.2 days. Worst performance seen during Monday volume peaks and during high-complexity complaint weeks.

4. WHO is affected? Which customers, employees, stakeholders or departments?

External customers waiting too long for resolution; front-line customer service agents handling repeat contacts and escalations; the Operations Director managing performance reporting.

5. What is the IMPACT? What does it cost in time, money, quality or satisfaction?

£1,200 per day in additional handling cost from repeat contacts. CSAT score at 67% against an 80% target. Complaint escalation rate of 23%, generating additional management overhead.

6. What is NOT the problem? What is explicitly out of scope? What are you not solving?

This project does not address overall complaint volumes, IT system performance or limitations, staffing headcount decisions, or individual agent skill and capability.

COMPLETED PROBLEM STATEMENT

The customer complaint handling process is failing to resolve complaints within the 3-day SLA target, averaging 5.2 days across all channels since Q3 2025. This is causing £1,200 per day in additional handling cost, a CSAT score of 67% against an 80% target, and a 23% escalation rate. Complaint prevention, IT infrastructure and individual agent performance are outside the scope of this project.

BLANK TEMPLATE

PROBLEM STATEMENT

PROBLEM STATEMENT

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

COMPLETED PROBLEM STATEMENT

TEMPLATE 05 OF 10 · DEFINE

PROJECT CHARTER

WHAT IT IS

A Project Charter formally authorises a project. It captures the problem, objective, scope, team and timeline — giving everyone a shared understanding before work begins.

WHY WE USE IT

A Project Charter formally authorises the project. It captures the problem, objective, scope, team, milestones and sponsor on one page, giving everyone a shared starting point.

BENEFITS

- Single source of truth for what the project is and is not
- Surfaces scope and resource conflicts before work begins
- Provides written sponsor authority when decisions are challenged

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PROJECT CHARTER

Define your project purpose, scope PROJECT CHARTER

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				
Customer complaint response times are...					
PROJECT OBJECTIVE			What does success look like?		
Reduce average complaint response time...					
BUSINESS CASE			Why is this project worth doing now?		
Each day over SLA costs...					
PROJECT SCOPE			What is and is not included in...		
IN SCOPE			OUT OF SCOPE		
Complaint intake via phone			Complaint prevention and root...		
CRM logging and categorisation process			IT infrastructure upgrades or...		
SLA monitoring and escalation routing			Staff recruitment or headcount decisions		
Agent response workflows and templates			Supplier and third-party...		
Complaint trend reporting and dashboards			Customer satisfaction survey design		

PROJECT TEAM

NAME	ROLE	DEPARTMENT
James Carter	Project Owner	Operations
Sarah Ahmed	Process Analyst	Customer Service

KEY MILESTONES

MILESTONE	TARGET DATE	OWNER
Define current state and...	14 Apr 2026	James Carter
Root cause analysis and...	28 Apr 2026	Sarah Ahmed
Risk 1 — CRM system...		
NOTES & ASSUMPTIONS	Any additional context or...	
Project approved by Operations Director...		

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PROJECT CHARTER

PROJECT CHARTER

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

PROBLEM STATEMENT

PROJECT OBJECTIVE

BUSINESS CASE

PROJECT SCOPE

IN SCOPE

OUT OF SCOPE

PROJECT TEAM

NAME	ROLE	DEPARTMENT

KEY MILESTONES

MILESTONE	TARGET DATE	OWNER

RISKS & CONSTRAINTS

NOTES & ASSUMPTIONS

WORKSHOP TIP

Keep your project notes in one place

Project charter sessions, stakeholder meetings and tollgate reviews create decisions, assumptions and actions that are easy to lose. A dedicated CI notebook helps you keep project notes, questions and follow-ups together throughout the DMAIC journey.

Explore the SimplicityHub Notebook →

SIMPLICITYHUB NOTEBOOK

SCAN OR TAP TO EXPLORE

Explore the SimplicityHub Notebook

https://www.simplicityhub.co.uk/pages/notebook.html

TEMPLATE 06 OF 10 · DEFINE

TEAM RACI MATRIX

WHAT IT IS

A RACI Matrix defines who is Responsible, Accountable, Consulted and Informed for each project activity. It prevents confusion, duplication and gaps in ownership.

WHY WE USE IT

A RACI Matrix clarifies who is Responsible, Accountable, Consulted and Informed for each project activity. It eliminates the 'I thought you were doing that' failure mode.

BENEFITS

- Removes role ambiguity on cross-functional teams
- Speeds up decisions by naming a single Accountable per activity
- Reduces duplicated work and missed handoffs

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

TEAM RACI MATRIX

Define who does what across all project activities and decisions. TEAM RACI MATRIX

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS TEAM RACI MATRIX?

A RACI Matrix defines who is Responsible, Accountable, Consulted and Informed for each project activity. It prevents confusion, duplication and gaps in ownership.

Activity / Task	James Carter	Sarah Ahmed	Tom Barker	Louise Chen	Sarah Mitchell	Finance Lead
Define project scope and charter	R	A	C	C	C	I
Conduct stakeholder analysis	R	C	I	C	I	I
Map current complaint process (SIPOC)	A	R	C	C	I	I
Root cause analysis	A	R	I	C	I	I
Design improved process	A	R	C	C	I	I
Develop CRM system changes	C	I	R	I	I	I
Test improved process (pilot)	A	R	C	R	I	I
Train agents on new process	A	R	I	C	I	I
Full rollout and go-live	A	R	R	C	I	I
Close project and report outcomes	R	C	C	C	A	I

KEY:

R = Responsible: The person or people who carry out the task A = Accountable: The single owner who is ultimately answerable C = Consulted: People whose input should be sought before action I = Informed: People who should be kept up to date

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TEAM RACI MATRIX

TEAM RACI MATRIX

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Activity / Task	Member	Member	Member	Member	Member	Member
Activity 1						
Activity 2						
Activity 3						
Activity 4						
Activity 5						
Activity 6						
Activity 7						
Activity 8						
Activity 9						
Activity 10						

KEY:

TEMPLATE 07 OF 10 · DEFINE

PROJECT RISK ASSESSMENT

WHAT IT IS

A Risk Assessment identifies potential problems before they happen. By rating each risk on likelihood and impact, you can prioritise your mitigations and protect project delivery.

WHY WE USE IT

A Project Risk Assessment identifies what could derail the project, rates likelihood and impact, and assigns mitigation ownership. It turns 'we should have seen that coming' into a planned response.

BENEFITS

- Surfaces threats early when mitigation is still cheap
- Gives sponsors visibility of project exposure
- Creates a register that can be reviewed and updated as the project runs

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PROJECT RISK ASSESSMENT

Identify risks early and plan mitigations to protect delivery. PROJECT RISK ASSESSMENT

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS PROJECT RISK ASSESSMENT?

A Risk Assessment identifies potential problems before they happen. By rating each risk on likelihood and impact, you can prioritise your mitigations and protect project delivery.

Risk Score = Likelihood (1–5) × Impact (1–5) │ 1–4: Low │ 5–9: Medium │ 10–16: High │ 17–25: Critical

#	Risk Description	Category	L ×	Scor	Mitigation / Owner / Status
1	CRM system cannot support new complaint logging requirements	Technical	3 × 4	12	Assess CRM capability in week 1; identify workaround or alternative approach if needed │ Owner: Tom Barker │ Status: Open
2	Agent resistance to new complaint process and ways of working	People	3 × 3	9	Involve team leads in process design; run change communications early and throughout project │ Owner: Sarah Ahmed │ Status: Open
3	Key project team member unavailable during delivery	Resource	2 × 4	8	Cross-train on all workstreams; document decisions and design choices as project progresses │ Owner: James Carter │ Status: Open
4	Scope creep — additional requirements added during project	Process	3 × 3	9	Strict change control in place; all scope changes must be approved by sponsor before actioning │ Owner: James Carter │ Status: Open
5	Process changes worsen performance in short term during transition	Process	2 × 3	6	Monitor daily KPIs in first 2 weeks of pilot; rollback plan agreed with team before go-live │ Owner: Sarah Ahmed │ Status: Open
6	Finance approval for project budget delayed beyond week 2	Resource	2 × 3	6	Early engagement with finance; pre-agreed budget envelope submitted in advance of start date │ Owner: James Carter │ Status: Open
7	Complaint volumes increase significantly during the project period	External	2 × 2	4	Project will not reduce available capacity; monitor weekly and flag to sponsor if volumes spike │ Owner: James Carter │ Status: Monitor
8	Legal review required for changes to complaint process documentation	Compliance	1 × 4	4	Flag all process changes to compliance team for sign-off before any rollout is approved │ Owner: Louise Chen │ Status: Open
9	IT changes delayed due to competing business priorities	Technical	3 × 3	9	IT lead embedded in core team; sponsor escalation path available if IT resource is blocked │ Owner: Tom Barker │ Status: Open
10	Pilot site unavailable or unsuitable for testing new process	Resource	1 × 2	2	Identify 2 potential pilot sites and confirm availability by end of week 3 of the project │ Owner: Sarah Ahmed │ Status: Open

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PROJECT RISK ASSESSMENT

PROJECT RISK ASSESSMENT

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

#	Risk Description	Category	L × I	Score
1			—	—
2			—	—
3			—	—
4			—	—
5			—	—
6			—	—
7			—	—
8			—	—
9			—	—
10			—	—

TEMPLATE 08 OF 10 · DEFINE

SIPOC

WHAT IT IS

A SIPOC is a high-level process map used to define the key components of a process before detailed improvement work begins. It helps teams align on scope, inputs, outputs and who is involved.

WHY WE USE IT

A SIPOC (Suppliers, Inputs, Process, Outputs, Customers) is a high-level map that aligns the team on the boundaries of the process before detailed analysis. It is usually the first process picture in Define.

BENEFITS

- Forces agreement on where the process starts and ends
- Surfaces missing suppliers or customers early
- Acts as a scope diagram for stakeholders unfamiliar with the process

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

SIPOC

Map the end-to-end process by identifying Suppliers, Inputs, Process steps, Outputs and Customers. SIPOC DIAGRAM

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Handling Process	James Carter	Operations Director	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS A SIPOC?

A SIPOC is a high-level process map used to define the key components of a process before detailed improvement work begins. It helps teams align on scope, inputs, outputs and who is involved.

SUPPLIERS
Who provides the inputs? INPUTS
What goes into the process? PROCESS
Key steps from start to end PROCESS DESCRIPTION
What happens at each step? OUTPUTS
What does the process produce? CUSTOMERS
Who receives the outputs?

Customer Complaint via phone, email or online form 1. Receive Customer submits complaint via phone, email or online form Acknowledgement confirmation Customer

CRM system Customer account and purchase history 2. Log Complaint is logged in CRM with category, priority and timestamp Logged complaint record Service team

Service team Investigation notes and resolution decision 3. Investigate Service agent reviews account history and identifies root cause Resolution or escalation decision Customer / Escalation team

Escalation team Escalated cases and authorisation level 4. Resolve Resolution offered within SLA or case escalated for approval Final complaint resolution Customer

QA / Reporting Closed complaint data and response times 5. Close & Report Case closed, customer notified, data captured for trend reporting Complaint trend report Operations Director

NOTES AND ASSUMPTIONS

This SIPOC was created to support the Customer Complaint Response Time Reduction project. The process scope begins when a customer submits a complaint and ends when the case is closed and data is captured. Agent performance coaching and IT system changes are out of scope.

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SIPOC

SIPOC DIAGRAM

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Step 1
Step 2
Step 3
Step 4
Step 5

NOTES AND ASSUMPTIONS

TEMPLATE 09 OF 10 · DEFINE

STAKEHOLDER ANALYSIS

WHAT IT IS

A Stakeholder Analysis identifies everyone affected by or involved in your project. It helps you understand their level of influence and interest so you can engage the right people in the right way.

WHY WE USE IT

A Stakeholder Analysis maps everyone affected by or able to influence the project, then plans how to engage each one. It turns stakeholder management from reactive into deliberate.

BENEFITS

- Identifies blockers and champions before they surface in meetings
- Tailors engagement to interest and influence rather than one-size-fits-all
- Prevents the late-stage 'we should have involved them earlier' problem

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

STAKEHOLDER ANALYSIS

Identify stakeholders and plan engagement based on influence and interest. STAKEHOLDER ANALYSIS

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS STAKEHOLDER ANALYSIS?

A Stakeholder Analysis identifies everyone affected by or involved in your project. It helps you understand their level of influence and interest so you can engage the right people in the right way.

Name / Group	Department /	Influence	Interest	Position	Engagement Strategy
Sarah Mitchell	Director Level	High	High	Champion	Monthly exec updates; involve in key decisions and approvals
James Carter	Operations	High	High	Champion	Daily project lead; owns scope and delivery decisions
Sarah Ahmed	Customer Service	Medium	High	Supporter	Core team member; weekly check-ins and design workshops
Tom Barker	IT	Medium	Medium	Neutral	Bi-weekly updates; involve early in technical design phase
Louise Chen	QA	Medium	High	Supporter	Core team member; owns quality and compliance sign-off
Front-line agents	Customer Service	Low	High	Neutral	Group briefings; feedback surveys; team lead cascade
Finance team	Finance	Low	Low	Neutral	Quarterly ROI updates; align to month-end reporting
Legal/Compliance	Compliance	Low	Low	Neutral	Inform of process changes requiring compliance review

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STAKEHOLDER ANALYSIS

STAKEHOLDER ANALYSIS

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Name /	Department / Org	Influence	Interest	Position	Engagement Strategy

TEMPLATE 10 OF 10 · DEFINE

VOICE OF THE CUSTOMER

WHAT IT IS

Voice of the Customer (VOC) captures what customers want, need and expect. It translates customer feedback into structured requirements that drive your improvement project.

WHY WE USE IT

Voice of the Customer (VOC) captures what customers actually need, translated into measurable requirements (CTQs). It keeps the project grounded in what matters to the people it serves.

BENEFITS

- Anchors improvement targets to real customer pain, not internal assumptions
- Translates fuzzy feedback into measurable requirements
- Gives the team an outside-in reference when prioritising solutions

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

VOICE OF THE CUSTOMER

Translate customer feedback into structured improvement requirements. VOICE OF THE CUSTOMER

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS VOICE OF THE CUSTOMER?

Voice of the Customer (VOC) captures what customers want, need and expect. It translates customer feedback into structured requirements that drive your improvement project.

Customer Segment	Voice of Customer (verbatim)	Key Theme	Priority	Current State / Target	Action Required
Complaint caller	I had to call three times before anyone helped me	First contact resolution	High	42% FCR → 70% FCR	Redesign escalation routing and authority levels
Email customer	I never know where my complaint is up to	Status visibility	High	No tracking → Live updates	Implement automated complaint status notifications
Team leader	Agents can't find the right process quickly	Process clarity	High	Inconsistent → Standardised	Build a single agent complaint process guide
CSAT survey	Response took over a week — totally unacceptable	Speed of response	High	5.2 days avg → ≤ 3 days	Streamline intake triage and reduce hand-offs
Repeat contact	I had to explain the same problem again	Case continuity	Medium	38% repeat rate → < 20%	Improve CRM logging — full case history visible
Online review	No one followed up after promising to call me back	Follow-up reliability	Medium	Ad hoc → Structured	Create callback follow-up workflow with SLA
Agent feedback	I don't have authority to resolve most complaints	Agent empowerment	Medium	Low authority → Defined levels	Define and publish resolution authority matrix
NPS driver	I'd recommend you if complaints were handled faster	Overall experience	High	32 NPS → 55 NPS	Deliver all workstreams above to drive NPS uplift

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VOICE OF THE CUSTOMER

VOICE OF THE CUSTOMER

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Customer Segment	Key Theme	Priority		Action Required
			→	
			→	
			→	
			→	
			→	
			→	
			→	
			→	

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For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

STAGE 02 OF 05

MEASURE

Quantify the current state with credible data

The Measure stage replaces opinion with evidence. We define the process, decide what to measure, check that our measurement is trustworthy, then capture a baseline. Without a credible baseline, you cannot prove improvement later.

TEMPLATES IN THIS STAGE

12 templates

The pages that follow take each measure template in turn. Read the description, the rationale and the benefits; study the completed example; then use the blank version to apply it to your own project.

TEMPLATE 01 OF 12 · MEASURE

BASELINE METRICS SHEET

WHAT IT IS

A Baseline Metrics Sheet records the current (pre-improvement) performance level of each key metric. Establishing the baseline before any changes are made is essential for measuring true improvement impact.

WHY WE USE IT

A Baseline Metrics Sheet records the starting performance of every metric the project will move. Without it, you cannot honestly claim improvement at the end.

BENEFITS

- Locks in the 'before' picture before changes start
- Standardises how each metric is calculated and sourced
- Becomes the comparison reference for the Control stage

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

BASELINE METRICS SHEET

Capture current performance before improvement begins. BASELINE METRICS SHEET

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS BASELINE METRICS SHEET?

A Baseline Metrics Sheet records the current (pre-improvement) performance level of each key metric. Establishing the baseline before any changes are made is essential for measuring true improvement impact.

METRICS BASELINE

Record the current state before any improvement actions are taken

Metric	Unit	Data Source	Baselin	Period	Target	Gap	Owner	Notes
Average complaint response time	Days	CRM system	5.2	Q3 2025 (3 months)	≤ 3.0	2.2 days	James Carter	SLA target is 3 calendar days
Customer satisfaction (CSAT)	Score (%)	Post-complaint survey	67%	Q3 2025 (3 months)	≥ 80%	13% pts	James Carter	Industry benchmark: 82%
First contact resolution (FCR)	%	CRM system	42%	Q3 2025 (3 months)	≥ 70%	28% pts	Sarah Ahmed	Best practice target: 70–75%
Complaint escalation rate	%	CRM system	23%	Q3 2025 (3 months)	≤ 10%	13% pts	Sarah Ahmed	Aligned to 2024 strategic target
Repeat contact rate	%	CRM system	38%	Q3 2025 (3 months)	< 20%	18% pts	Sarah Ahmed	Directly linked to FCR target
Net Promoter Score (NPS)	Score	NPS survey	32	Q3 2025 (quarterly)	≥ 55	23 pts	James Carter	Complaint handling is #1 NPS driver
Daily complaint volume	Per day	CRM intake	47 avg	Q3 2025 (3 months)	Stable — monitor only	N/A	James Carter	Context metric — not a project target
Handling cost per complaint	£	Finance estimate	£31.40	Q3 2025 estimate	≤ £20.00	£11.40	James Carter	Includes repeat handling and escalation cost

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BASELINE METRICS SHEET

BASELINE METRICS SHEET

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

METRICS BASELINE

Metric	Unit	Data	Baseline	Period	Target	Gap	Owner	Notes

TEMPLATE 02 OF 12 · MEASURE

CONTROL CHART (I-MR)

WHAT IT IS

An I-MR (Individuals and Moving Range) Control Chart plots individual measurements over time with statistically calculated control limits (UCL and LCL). Points outside the control limits indicate special-cause variation requiring investigation.

WHY WE USE IT

A Control Chart (I-MR for individual values and moving range) shows whether a process is stable over time or being driven by special-cause variation. It is the foundation tool for understanding process behaviour.

BENEFITS

- Separates normal noise from real signal so you don't chase ghosts
- Visually flags when something has truly changed
- Becomes the long-term monitoring tool handed over in Control

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

CONTROL CHART (I-MR)

Plot individual measurements... CONTROL CHART

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED	
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter	
BUSINESS AREA	Customer Service					
WHAT IS CONTROL CHART?	An I-MR (Individuals and Moving Range)...					
CHART CONFIGURATION			Define what is being plotted			
Metric	Complaint response time					
Unit	Days					
CONTROL LIMIT SUMMARY			Calculated from entered data			
X̄ (Process Mean)	2.0440					
UCL (Upper Control Limit)	2.7975					
LCL (Lower Control Limit)	1.2905					
MR̄ (Average Moving Range)	0.2833					
UCL (Moving Range)	0.9256					
Sigma estimate (σ)	0.2512					
DATA POINTS			Raw data with moving range and control...			
#	Label	Value	Moving Range	vs UCL	vs LCL	Status
1	Obs 1	2.1	—	OK	OK	In control
2	Obs 2	1.9	0.2000	OK	OK	In control
3	Obs 3	2.3	0.4000	OK	OK	In control
4	Obs 4	2.0	0.3000	OK	OK	In control
5	Obs 5	1.8	0.2000	OK	OK	In control
6	Obs 6	2.2	0.4000	OK	OK	In control
7	Obs 7	2.1	0.1000	OK	OK	In control
8	Obs 8	1.7	0.4000	OK	OK	In control
9	Obs 9	2.4	0.7000	OK	OK	In control

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CONTROL CHART (I-MR)

CONTROL CHART

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

CHART CONFIGURATION

Metric
Unit

DATA POINTS

#	Label	Value	Moving Range	vs UCL	vs LCL	Status

TEMPLATE 03 OF 12 · MEASURE

DATA COLLECTION PLAN

WHAT IT IS

A Data Collection Plan defines exactly what data to collect, from which source, using which method, how often, by whom and in what format. Completing this before data collection begins ensures consistency and credibility.

WHY WE USE IT

A Data Collection Plan defines exactly what data to capture, from where, how often, by whom and in what format — before collection begins. It prevents the painful 'we have a spreadsheet of data we can't trust' outcome.

BENEFITS

- Eliminates collection inconsistencies between people and shifts
- Makes sample sizes and frequencies defensible
- Builds credibility for the data findings later in the project

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

DATA COLLECTION PLAN

Define what data to collect, from where DATA COLLECTION PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS DATA COLLECTION PLAN?

A Data Collection Plan defines exactly what...

DATA COLLECTION REGISTER

Define each metric before collection begins

Metric / Data	Operational Definition	Data Source	Collection Method	Collector	Frequency	Sample Size	Recording Format
Average complaint response time	Days from complaint receipt to...	CRM system	Automated date field extraction	Team Leader	Weekly	All complaints in period	CRM Weekly Report
Customer satisfaction (CSAT)	% of post-complaint survey responses rating...	CRM + survey tool	Survey sent at complaint closure — automated	Survey tool (automated)	Per complaint closure	All closed complaints	CSAT dashboard
First contact resolution rate	% complaints closed without escalation or repeat...	CRM system	FCR flag + linked case query	Team Leader	Weekly	All closed complaints	CRM FCR Report
Complaint escalation rate	% complaints escalated to senior handler...	CRM system	CRM escalation flag query	Team Leader	Weekly	All complaints in period	CRM Weekly Report
Repeat contact rate	% complaints where customer contacted again within...	CRM system	Repeat contact flag + linked cases query	Team Leader	Weekly	All complaints in period	CRM Repeat Contact Report
Complaint volume by channel	Count of complaints received per channel	CRM intake form	CRM channel tag query	Team Leader	Daily + weekly summary	All incoming complaints	CRM intake report
Agent handling time per complaint	Average minutes spent per complaint per agent	Agent self-log in CRM	Manual agent time entry at complaint closure	Agents (individual) + Team Leader	Per complaint	Sample of 30/ agent/week	Agent time log sheet
Complaint category (root cause type)	Category of complaint cause	CRM category field	Manual coding by agent at complaint closure	Agent at closure	Per complaint	All closed complaints	CRM category extract

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DATA COLLECTION PLAN

DATA COLLECTION PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

DATA COLLECTION REGISTER

Metric / Data	Data Source	Collection Method	Collector	Frequency	Sample Size	Recording Format

TEMPLATE 04 OF 12 · MEASURE

MEASUREMENT SYSTEM CHECK

WHAT IT IS

A Measurement System Check screens each metric for potential issues with repeatability, reproducibility, bias and sampling before data collection begins. It identifies which metrics need a formal Measurement System Analysis (MSA).

WHY WE USE IT

A Measurement System Check (a lightweight MSA) tests whether the measurement itself is reliable — repeatable, reproducible and consistent — before you trust the numbers. Most teams skip this and regret it.

BENEFITS

- Catches bad measurements before they drive bad decisions
- Quantifies how much of the variation is in the measurement vs the process
- Builds analyst confidence in the data being used

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

MEASUREMENT SYSTEM CHECK

Assess whether your measurement approach is reliable before collecting data. MEASUREMENT SYSTEM CHECK

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS MEASUREMENT SYSTEM CHECK?

A Measurement System Check screens each metric for potential issues with repeatability, reproducibility

MEASUREMENT SYSTEM ASSESSMENT

Review each metric's measurement approach

Metric	Measurement Tool /	Data Type	Repeatability Issue?	Reproducibility Issue?	Bias Concern	Sample Concern	MSA Needed?	Recommended Action
Avg response time	CRM date fields	Continuous	No	No	None identified	None — all complaints	No	Proceed to data collection
CSAT score	Post-complaint survey	Ordinal (1–5)	Yes	No	Non-response bias	34% response — too low	Yes — recommended	Improve survey trigger; target >50% response rate
FCR rate	CRM FCR flag + linked cases	Binary	Partial	Yes	Agent consistency	None — all complaints	Yes — recommended	Inter-rater reliability check; calibrate FCR flag process
Escalation rate	CRM escalation flag	Binary	No	No	None identified	None — all complaints	No	Proceed to data collection
Repeat contact rate	CRM linked case fields	Binary	Partial	Yes	Agent consistency	None — all complaints	Yes — recommended	Validate linking process; spot-check 10/week
Complaint volume	CRM intake date/ channel	Count	No	No	None identified	None — all received	No	Proceed to data collection
Agent handling time	Agent self-log in CRM	Continuous	Yes	Yes	Subjectivity + rounding	n=30/agent/week	Yes — recommended	Validate vs call system data; confirm definition with agents
Complaint category	CRM category field	Nominal	Yes	Yes	Subjectivity — coding varies	None — all complaints	Yes — recommended	Inter-rater reliability test; run calibration session

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MEASUREMENT SYSTEM CHECK

MEASUREMENT SYSTEM CHECK

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

MEASUREMENT SYSTEM ASSESSMENT

Metric	Data Type	Bias Concern	Sample Concern	Recommended Action

TEMPLATE 05 OF 12 · MEASURE

OPERATIONAL DEFINITION SHEET

WHAT IT IS

An Operational Definition Sheet defines exactly what each metric means, how it is calculated, and who measures it — so everyone collects data the same way. Without this, two people measuring the same thing will get different results.

WHY WE USE IT

An Operational Definition removes ambiguity from a metric — exactly how it is counted, what is included and excluded, and which records qualify. It ensures two people measuring the same thing get the same answer.

BENEFITS

- Eliminates 'apples vs oranges' arguments in review meetings
- Makes metrics defensible when challenged by stakeholders
- Locks in consistency for long-term Control stage tracking

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

OPERATIONAL DEFINITION SHEET

Eliminate ambiguity — define... OPERATIONAL DEFINITION SHEET

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				
WHAT IS OPERATIONAL DEFINITION SHEET?	An Operational Definition Sheet...				
METRIC 1: AVERAGE COMPLAINT RESPONSE TIME			Complete one section per metric		
Metric Name	Average Complaint Response Time				
What does it measure?	The average number of...				
How is it calculated?	Sum of (Closed Date – Receipt...				
Data source	CRM system — auto-populated date...				
Who measures it?	Team Leader — extracted from CRM weekly...				
When is it collected?	Weekly (every Monday for the...				
Counting rules	Count calendar days, including weekends.				
What counts?	Any contact from a customer expressing...				
What does NOT count?	Information requests without...				
METRIC 2: CUSTOMER SATISFACTION SCORE (CSAT)			Complete one section per metric		
Metric Name	Customer Satisfaction Score (CSAT)				
What does it measure?	The percentage of customers who...				
How is it calculated?	(Number of responses rated 4 or 5 ÷...				
Data source	Post-complaint survey tool —...				
Who measures it?	Survey tool reports automatically.				
When is it collected?	Survey sent automatically at...				
Counting rules	Only count survey responses received...				
What counts?	Any fully completed survey response...				
What does NOT count?	Partial survey responses.				

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OPERATIONAL DEFINITION SHEET

OPERATIONAL DEFINITION SHEET

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

METRIC 1

Metric Name

Data source

Counting rules

METRIC 2

Metric Name

Data source

Counting rules

METRIC 3

Metric Name

Data source

Counting rules

METRIC 4

Metric Name

Data source

Counting rules

TEMPLATE 06 OF 12 · MEASURE

PROCESS CAPABILITY CALCULATOR

WHAT IT IS

Process capability indices measure how well a process performs relative to its specification limits. Cp measures the spread; Cpk measures both spread and centring. A Cpk ≥ 1.33 indicates a capable process.

WHY WE USE IT

Process Capability (Cp, Cpk, Pp, Ppk) compares process performance against customer specification limits. It tells you whether the process is capable of meeting requirements, not just whether it is stable.

BENEFITS

- Quantifies gap between current performance and customer requirements
- Differentiates a stable process from a capable one
- Provides a defensible number for setting improvement targets

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PROCESS CAPABILITY CALCULATOR

Enter your process data to calculate Cp, Cpk and sigma level. PROCESS CAPABILITY CALCULATOR

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS PROCESS CAPABILITY CALCULATOR?

Process capability indices measure how well a process performs relative to its specification limits. Cp measures the spread; Cpk measures both spread and centring. A Cpk ≥ 1.33 indicates a capable process.

INPUTS

Enter process data

Metric name Complaint response time (post-improvement)
Unit Days
Upper Specification Limit (USL) 3.0
Lower Specification Limit (LSL) 1.0
Process Mean (X̄) 2.0
Standard Deviation (s) 0.25
Sample size (n) 100

CALCULATED RESULTS

Assessment: Capable

Cp (process spread ratio)	1.3333	(USL - LSL) ÷ (6 × s)
Cpk (centred capability)	1.3333	min((USL - X̄) ÷ 3s, (X̄ - LSL) ÷ 3s)
Cpu (upper capability)	1.3333	(USL - X̄) ÷ (3 × s)
Cpl (lower capability)	1.3333	(X̄ - LSL) ÷ (3 × s)
Sigma level	4.000σ	Cpk × 3
% within specification	99.994%	Estimated from normal distribution
% outside specification	0.0063%	Above USL + below LSL
Assessment	Capable	Cpk < 1.0 Incapable | 1.0–1.33 Marginal | ≥1.33 Capable | ≥1.67 World class

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PROCESS CAPABILITY CALCULATOR

PROCESS CAPABILITY CALCULATOR

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

INPUTS

Metric name
Unit

Process Mean (X̄)

Sample size (n)

CALCULATED RESULTS

—
—
— (USL - X̄) ÷ (3 × s)
— (X̄ - LSL) ÷ (3 × s)

Sigma level	—	Cpk × 3
	—	
	—	
Assessment	—	

TEMPLATE 07 OF 12 · MEASURE

PROCESS MAP

WHAT IT IS

A Process Map documents the sequence of steps that turn inputs into outputs. Recording each step's role, inputs, outputs and cycle time enables teams to identify waste, bottlenecks and improvement opportunities.

WHY WE USE IT

A Process Map shows the actual sequence of steps, decisions and handoffs in the current process. It exposes complexity, rework loops and ownership gaps that are invisible when the process is only described in words.

BENEFITS

- Reveals hidden handoffs, rework and decision bottlenecks
- Creates a shared picture the team can challenge and improve
- Becomes the basis for the new, improved process design

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PROCESS MAP

Document each step, role, input, output and cycle time. PROCESS MAP

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS PROCESS MAP?

A Process Map documents the sequence of steps that turn...

PROCESS STEPS

Enter each step — Step Type key: Start | Process |...

#	Step Name	Role / Swimlane	Type	Description	Inputs	Outputs	Cycle Time	Issues / Waste
1	Complaint received	All channels	Start	Customer contacts via phone, email or online form	Customer contact	Complaint created in CRM	< 5 min	Online form not linked to CRM — manual rekeying required
2	Triage and log	Agent	Process	Agent categorises complaint type, assigns to correct handler	Complaint in CRM	Complaint categorised and assigned	8 min avg	No standard triage process — agent-dependent decisions
3	Within agent authority?	Agent	Decision	Can the agent resolve without escalation?	Complaint details	Resolve path OR Escalation path	2 min avg	Authority levels unclear — over-escalation common
4	Investigate and resolve	Agent / Specialist	Process	Agent or specialist investigates root cause and agrees resolution	Complaint + case notes	Proposed resolution	2.1 days avg	No consistent investigation checklist — variable depth
5	Resolve within SLA?	Team Leader	Decision	Is the complaint resolved within the 3-day SLA?	Case status + dates	On time OR Escalated / extended	< 1 min	No real-time SLA alert — breaches identified too late
6	Communicate resolution	Agent	Process	Agent contacts customer to confirm resolution and close case	Agreed resolution	Customer informed; CRM updated	10 min avg	No standard closure script — inconsistent communication
7	Complaint closed	Agent	End	Agent marks complaint as closed in CRM and triggers CSAT survey	Confirmed resolution	Closed case; CSAT survey triggered	3 min avg	Survey trigger fails if case not correctly closed in CRM
8								

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PROCESS MAP

PROCESS MAP

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

PROCESS STEPS

#	Step Name	Role / Swimlane	Type	Description	Inputs	Outputs	Cycle Time	Issues / Waste
1								
2								
3								
4								
5								
6								
7								
8								

TEAM WORKSHOP TIP

Map the process with a brew and a clear head

Process mapping sessions often take longer than expected. Gather the team, work through the current state together, and keep the conversation flowing while you challenge waste, handoffs and delays.

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TEMPLATE 08 OF 12 · MEASURE

RUN CHART

WHAT IT IS

A Run Chart plots individual data points over time and adds a median line. It is used before control charts to detect obvious trends, shifts and patterns. A 'run' of 8+ points above or below the median signals a non-random pattern.

WHY WE USE IT

A Run Chart plots a metric over time so you can see trends, shifts and cycles. It is the simplest tool for understanding whether a process is changing.

BENEFITS

- Spots trends and shifts no single data point can reveal
- Quick to build with minimal data — ideal for early Measure work
- Provides a visual baseline that anyone can interpret

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

RUN CHART

Plot measurements over time to detect... RUN CHART

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				
WHAT IS RUN CHART?	A Run Chart plots individual...				
CHART CONFIGURATION			Define what is being plotted		
Metric being plotted	Average complaint response time				
Unit of measurement	Days				
Target value	3.0				
DATA POINTS			Enter label and value for each...		
#	Label	Value	vs Median	Note	
1	Wk 1	5.8	Above median		
2	Wk 2	5.4	Above median		
3	Wk 3	5.9	Above median		
4	Wk 4	6.1	Above median		
5	Wk 5	5.7	Above median		
6	Wk 6	5.3	Above median		
7	Wk 7	5.6	Above median		
8	Wk 8	5.2	Above median		
9	Wk 9	4.8	Below median		
10	Wk 10	4.9	Above median		
11	Wk 11	5.1	Above median		
12	Wk 12	4.7	Below median		
13	Wk 13	4.4	Below median		
14	Wk 14	4.2	Below median		
15	Wk 15	4.0	Below median		
16	Wk 16	3.8	Below median		

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RUN CHART

RUN CHART

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

CHART CONFIGURATION

Metric being plotted
Unit of measurement
Target value

DATA POINTS

#	Label	Value	vs Median	Note

TEMPLATE 09 OF 12 · MEASURE

SAMPLING PLAN

WHAT IT IS

A Sampling Plan defines how data will be collected in a way that is statistically valid, representative and practical. It specifies the population, sampling method, sample size, confidence level, frequency, collector and recording format for each metric.

WHY WE USE IT

A Sampling Plan defines how much data to collect and how to select it so the sample reliably represents the population. It saves time and avoids biased conclusions.

BENEFITS

- Prevents over-collection (wasted effort) and under-collection (wrong answers)
- Removes selection bias from data gathering
- Makes results statistically defensible

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

SAMPLING PLAN

Define how you will collect a representative and statistically valid data sample. SAMPLING PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS SAMPLING PLAN?

A Sampling Plan defines how data will be collected in a way that is statistically valid, representative and practical. It specifies the population, sampling method, sample size, confidence level, frequency, collector and recording format for each metric.

SAMPLING DESIGN

Plan each metric's sampling approach before collection begins

Metric / Data	Data Type	Population	Pop. Size	Sampling Method	Sample n	CI %	Margin of	Frequency	Collector	Recording Format
Avg response time	Continuous	All complaints closed in period	~940/qtr	Census (all)	All	95%	N/A	Weekly	Team Leader	CRM Weekly Extract
CSAT score	Ordinal (1–5)	Customers who received survey	~940 sent; 320 received (34%)	Convenience (all responders)	All received	95%	±5.4% (est.)	Per complaint closure	Survey tool (auto)	CSAT Dashboard
FCR rate	Binary (Y/N)	All complaints closed in period	~940/qtr	Census	All	95%	N/A	Weekly	Team Leader	CRM FCR Report
Agent handling time	Continuous	All complaints handled by agents	~1,200/qtr	Systematic random	n=30/agent/week	95%	±3 min (est.)	Weekly, per agent	Agents + Team Leader	Agent Time Log
Complaint category	Nominal	All closed complaints	~940/qtr	Census	All	95%	N/A	Per complaint closure	Agents (at closure)	CRM Category Extract
Escalation rate	Binary (Y/N)	All complaints in period	~940/qtr	Census	All	95%	N/A	Weekly	Team Leader	CRM Escalation Report
Repeat contact rate	Binary (Y/N)	All complaints in period	~940/qtr	Census	All	95%	N/A	Weekly	Team Leader	CRM Repeat Contact Report
Volume by channel	Count	All incoming complaint contacts	All received	Census	All	95%	N/A	Daily + weekly	Team Leader	CRM Intake Report

For downloadable templates go to https://www.simplicityhub.co.uk/templates.html
For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

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SAMPLING PLAN

SAMPLING PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

SAMPLING DESIGN

Metric / Data	Data Type	Population	Pop. Size	Sampling Method	Sample n	CI %	Margin of Error	Frequency	Collector	Recording Format

TEMPLATE 10 OF 12 · MEASURE

Measurement Definitions

WHY WE USE IT

A Measurement Definitions quick reference is a one-page list of every metric in the project with its formula, source and owner.

BENEFITS

- Gives the team a fast 'what does this metric mean' lookup
- Reduces inconsistent reporting across stakeholders
- Acts as a living dictionary that survives team handovers

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Measurement Definitions

SimplicityHub™ — Measurement Quick Reference

Write down exactly what each measure means, how it is calculated and where the data comes from.

Stage: Measure | Level: Beginner | Best for: Making sure everyone on the team measures things the same way from day one.

Measure Name	What It Means	Formula / How Calculated	Unit	Data Source	Collected By	Frequency
Order accuracy	% of orders shipped without errors	(Correct orders / Total orders) × 100	%	Quality log	QC team	Daily

TEMPLATE 11 OF 12 · MEASURE

Simple Tally Sheet

WHY WE USE IT

A Simple Tally Sheet is the lightest possible data collection tool — a hand-marked count of how often each category occurs. Perfect for fast, frontline data capture.

BENEFITS

- Zero learning curve — anyone can use it on day one
- Generates real data in days, not weeks
- Often produces enough insight on its own to pinpoint the biggest issue

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Simple Tally Sheet

SimplicityHub™ — Simple Tally Sheet

Count how often something happens using a basic tally format so the team has real numbers to work with.

Stage: Measure │ Level: Beginner │ Best for: Quick data collection when you just need to count occurrences over a set period.

Item / Category	Mon	Tue	Wed	Thu	Fri	Weekly Total	Notes
Late starts	2	1	3	0	1	7	Mostly morning shift
Missing paperwork	1	0	2	1	0	4	
Customer complaint	0	1	0	0	1	2	Both about delivery
Equipment issue	0	0	1	0	0	1	Scanner freezing
Rework needed	3	2	1	2	1	9	Highest category

TEMPLATE 12 OF 12 · MEASURE

VALUE STREAM MAP

WHAT IT IS

A Value Stream Map (VSM) documents the end-to-end flow of work from supplier/input to customer/output, capturing cycle time, value-add time, non-value-add time and inventory at each step. The goal is to identify and eliminate waste.

WHY WE USE IT

A Value Stream Map shows every step needed to deliver value to a customer with the time and inventory at each step. It exposes the proportion of time that is non-value-add.

BENEFITS

- Surfaces non-value-add waste invisible in process maps
- Quantifies lead time, process time and inventory
- Frames where the biggest Lean improvements live

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

VALUE STREAM MAP

Map the flow of work and identify waste across the end-to-end process. VALUE STREAM MAP

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS VALUE STREAM MAP?

A Value Stream Map (VSM) documents the end-to-end flow of work from supplier/input to customer/output

VALUE STREAM CONTEXT

Define the scope and demand

Customer / End recipient External customers — complaint via phone, email or online form
Supplier / Input source All customer contact channels (phone, email, online form, social)
Customer demand rate ~47 complaints per day (Q3 2025 average)

PROCESS STEP DATA

Enter data for each process step

Process Step	Cycle Time	VA Time	NVA Time	Inventory	Operators	Flow	Issues / Waste
Intake & Log	8 min	5 min	3 min	12	3	Push	Online form not linked to CRM — manual rekeying required
Triage & Assign	2 min	2 min	0 min	45	1	Push	No standard triage checklist — agent-dependent decisions
Investigate	2.1 days	30 min	1.9 days	78	5	Push	Waiting time dominates — 92% of cycle time is non-value-add
Resolution Decision	15 min	15 min	0 min	23	3	Push	Authority levels unclear — over-escalation common
Communicate & Close	10 min	10 min	0 min	15	5	Push	No standard closure script — inconsistent communication quality
CSAT Survey	3 min	3 min	0 min	5	0	Pull	Survey trigger fails if case incorrectly closed in CRM

EDITABLE MAP

See the 'Completed Example VSM' tab for the editable visual value stream map

The VSM tab is built from editable cells and formulas, not an inserted picture.

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VALUE STREAM MAP

VALUE STREAM MAP

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

VALUE STREAM CONTEXT

Customer demand rate

PROCESS STEP DATA

Process Step	Cycle Time	VA Time	NVA Time	Inventory	Operators	Flow	Issues / Waste
						Push	
						Push	
						Push	
						Push	
						Push	
						Push	

STAGE 03 OF 05

ANALYSE

Find and validate the true root causes

The Analyse stage moves from symptoms to causes. We brainstorm possible causes, narrow them down, then validate which ones actually drive the problem using data. Skipping validation here is the single biggest reason improvement projects fail to stick.

TEMPLATES IN THIS STAGE

14 templates

The pages that follow take each analyse template in turn. Read the description, the rationale and the benefits; study the completed example; then use the blank version to apply it to your own project.

TEMPLATE 01 OF 14 · ANALYSE

5 WHYS TEMPLATE

WHAT IT IS

The 5 Whys technique drills below surface symptoms to find the root cause of a problem by repeatedly asking 'Why?'. Work through each chain until you reach the true underlying cause, then define a corrective action to address it.

WHY WE USE IT

The 5 Whys drills past symptoms by asking 'why' repeatedly until a root cause is exposed. It is the fastest cause-analysis tool when the problem is reasonably contained.

BENEFITS

- Forces teams past surface explanations to underlying causes
- Takes minutes, not days — usable in any team meeting
- Produces causes that can be acted on, not blamed on

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

5 WHYS TEMPLATE

Drill down from symptom to root cause by asking 'Why?' five times in sequence. 5 WHYS TEMPLATE

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS 5 WHYS TEMPLATE?

The 5 Whys technique drills below surface symptoms to find the root cause of a problem by repeatedly asking 'Why?'. Work through each chain until you reach the true underlying cause, then define a corrective action to address it.

CHAIN 1: Response time exceeds 3-day SLA
Why 1 Because investigation takes too long (2.1 days average)
Why 2 Because there is no structured investigation checklist or defined investigation process
Why 3 Because complaint handling was never treated as a managed, documented process
Why 4 Because there is no process owner or accountability for complaint resolution end-to-end
Why 5 Because the complaint procedure was inherited from the previous team and never reviewed or redesigned
Root Cause No defined process owner and no structured complaint resolution process
Action Appoint complaint process owner; design and implement structured investigation procedure by Week 6

CHAIN 2: Repeat contact rate is 38%
Why 1 Because resolutions do not fully address the customer's original complaint
Why 2 Because agents resolve the immediate symptom rather than the underlying root cause
Why 3 Because no investigation checklist or root cause identification step exists in the process
Why 4 Because complaint closure only requires a 'resolution note', not root cause coding or validation
Why 5 Because the complaint procedure was designed for speed, not quality of resolution
Root Cause Complaint closure process does not require or verify root cause identification
Action Redesign closure process to require root cause coding; add validation question to closure checklist by Week 5

CHAIN 3: CSAT score is 67% (target ≥ 80%)
Why 1 Because customers feel their complaint was not properly resolved
Why 2 Because the communication given at resolution point is inconsistent across agents
Why 3 Because there is no standard closure conversation or resolution script for agents to follow
Why 4 Because agents use their own approach with no communication guidance or expectations
Why 5 Because communication quality was not included in the original agent training programme
Root Cause No standard communication framework or script for complaint resolution conversations
Action Design and implement standard resolution communication script; include in onboarding and refresher training by Week 7

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5 WHYS TEMPLATE

5 WHYS TEMPLATE

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Root Cause
Action

Root Cause
Action

Root Cause
Action

TEMPLATE 02 OF 14 · ANALYSE

CAUSE VALIDATION MATRIX

WHAT IT IS

The Cause Validation Matrix scores each potential cause against four criteria: strength of data evidence, degree of control, testability and impact if addressed. The combined score (out of 20) produces an objective priority ranking to guide root cause investigation.

WHY WE USE IT

A Cause Validation Matrix scores each suspected cause against the evidence available, so the team prioritises solving causes that data actually supports — not the loudest opinion in the room.

BENEFITS

- Stops teams chasing causes that 'feel right' but aren't
- Makes the evidence (or lack of it) for each cause visible
- Focuses limited improvement capacity on the highest-impact causes

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

CAUSE VALIDATION MATRIX

Score potential causes against key criteria to identify and prioritise root causes. CAUSE VALIDATION MATRIX

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS CAUSE VALIDATION MATRIX?

The Cause Validation Matrix scores each potential cause against four criteria: strength of data evidence, degree of control, testability and impact if addressed. The combined score (out of 20) produces an objective priority ranking to guide root cause investigation.

VALIDATION MATRIX

Score each cause 1 (weak/low) to 5 (strong/high) per criterion — total score out of 20

#	Potential Cause	Category	Data Evidence (1–5)	In Our Control (1–5)	Can We Test? (1–5)	Impact if Addressed (1–5)	Total Score (/20)	Evidence / Notes	Priority
1	No investigation checklist or structured process	Method / Process	5	5	5	5	20	Agent survey and process audit confirmed	High
2	CRM not integrated with email channel	Machine	5	3	4	4	16	CRM audit confirmed — manual rekeying required	High
3	No real-time SLA alert or dashboard	Machine	5	4	4	4	17	Confirmed — SLA breaches only seen post-fact	High
4	Authority levels unclear — over-escalation	People / Man	4	5	4	3	16	23% escalation rate; agent interviews confirmed	High
5	No standard resolution communication script	Method / Process	4	5	5	4	18	Mystery shop and CSAT verbatim confirmed	High
6	High complaint volume — capacity constraint	Environment	5	2	3	2	12	CRM intake report: 47 complaints/day average	Medium
7	Agent training gaps — complaint handling skills	People / Man	4	5	4	4	17	Skills assessment: 7/12 agents below standard	High
8	No FCR target or formal measurement in place	Measurement	5	5	5	4	19	KPI register confirmed — FCR not tracked or set	High

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CAUSE VALIDATION MATRIX

CAUSE VALIDATION MATRIX

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

VALIDATION MATRIX

#	Potential Cause	Category	Data Evidence (1–5)	In Our Control (1–5)	Can We Test?		Total Score (/20)	Evidence / Notes	Priority
1			3	3	3	3	12		
2			3	3	3	3	12		
3			3	3	3	3	12		
4			3	3	3	3	12		
5			3	3	3	3	12		
6			3	3	3	3	12		
7			3	3	3	3	12		
8			3	3	3	3	12		

TEMPLATE 03 OF 14 · ANALYSE

CORRELATION ANALYSIS SHEET

WHAT IT IS

A Correlation Analysis Sheet captures paired X-Y data and calculates the Pearson correlation coefficient (r) and coefficient of determination (R^2). Use it to test whether changes in one variable are associated with changes in another before drawing causal conclusions.

WHY WE USE IT

A Correlation Analysis tests whether two variables move together — a first step in checking whether a suspected cause actually relates to the problem.

BENEFITS

- Quantifies whether a relationship exists, beyond 'it looks like it'
- Filters out coincidental patterns
- Builds an evidence trail for which causes deserve deeper investigation

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

CORRELATION ANALYSIS SHEET

Enter X-Y data pairs to... CORRELATION ANALYSIS

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY		
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter		
BUSINESS AREA	Customer Service						
WHAT IS CORRELATION ANALYSIS?	A Correlation Analysis Sheet captures...						
X Variable	Complaint Response Time	X Unit	days	Y Variable	CSAT Score	Y Unit	score (1–5)
SUMMARY STATISTICS			Calculated from entered data pairs				
Pearson r	-0.9981						
R^2 (coefficient of determination)	0.9963						
Interpretation	Negative — very strong						
n (data points)	20						
DATA PAIRS			X = Complaint Response Time (days)...				
#	X — Complaint Response Time (days)	Y — CSAT Score (score (1–5))					
1	1.2	4.8					
2	1.5	4.6					
3	1.8	4.4					
4	2.0	4.2					
5	2.3	4.1					
6	2.5	3.9					
7	2.8	3.7					
8	3.0	3.5					
9	3.2	3.3					
10	3.5	3.1					
11	3.8	2.9					
12	4.0	2.8					

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CORRELATION ANALYSIS SHEET

CORRELATION ANALYSIS

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

X Variable	X Unit	Y Variable	Y Unit

DATA PAIRS

#	X — X variable	Y — Y variable

TEMPLATE 04 OF 14 · ANALYSE

FAILURE MODE IDENTIFICATION SHEET

WHAT IT IS

A Failure Mode Identification Sheet systematically identifies how each process step could fail, what the effect would be on the customer or process, what causes the failure, what controls currently exist and what mitigation actions are needed. Use it in the Improve phase before piloting solutions.

WHY WE USE IT

A Failure Mode Identification Sheet (a lightweight FMEA) lists what could go wrong in a process, rates severity, occurrence and detection, and prioritises by Risk Priority Number (RPN).

BENEFITS

- Surfaces failure modes before they cause customer impact
- Provides a defensible priority order for prevention work
- Becomes a live document that can be revisited in Control

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

FAILURE MODE IDENTIFICATION SHEET

Identify failure modes, effects, causes FAILURE MODE IDENTIFICATION

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS FAILURE MODE IDENTIFICATION?

A Failure Mode Identification Sheet...

FAILURE MODE IDENTIFICATION TABLE

Complete one row per failure mode identified...

Process Step	Failure Mode	Effect of Failure	Potential Cause	Current Controls	Detection Method	Risk	Recommended Action	Owner
1. Intake & Log	Complaint not captured in CRM	No record created; complaint lost;...	Manual rekeying from email and online form — no...	Agent checks CRM at start of shift	Manual spot-check	High	Improve CRM channel integration; interim...	IT Lead
2. Triage & Assign	Complaint assigned to wrong handler	Delay while re-routed; customer...	No triage checklist; assignment based on...	Re-routing flagged by receiving agent	Ad hoc — no formal check	High	Implement structured triage checklist; define...	James Carter
3. Investigate	Investigation incomplete	Root cause not identified; repeat...	No investigation checklist or structured...	Agent closure notes reviewed randomly by TL	Low frequency spot-check	High	Design and implement investigation...	James Carter
4. Resolution	Resolution does not address root cause	Customer contacts again; repeat rate...	Speed-focused closure process; no root cause...	CSAT survey (delayed; 34% response rate)	CSAT — delayed and incomplete	High	Redesign closure process to require root cause...	Sarah Ahmed
5. Communicate & Close	Inconsistent communication at closure	Customer feels unheard; low CSAT;...	No standard script or communication...	Mystery shop (quarterly only)	Low frequency — quarterly	Medium	Develop standard closure communication script;...	Sarah Ahmed
6. CSAT Survey	Survey not triggered at closure	No customer feedback captured; measurement gap	CRM case not correctly closed; trigger not fired	Response rate monitoring (weekly)	Weekly report — delayed detection	Medium	Fix CRM closure trigger; alert for missed...	IT Lead
7. Escalation	Complaint incorrectly escalated	Unnecessary senior time; higher cost; SLA impact	Authority levels unclear — no published...	De-escalation check by team leader (informal)	Ad hoc review	High	Define authority levels; publish escalation...	James Carter
8. SLA Monitoring	SLA breach not detected until after the fact	SLA failed; customer not proactively informed;...	No real-time SLA alert or monitoring...	End-of-week KPI review	Weekly — too late to prevent breach	High	Develop real-time SLA alert in CRM; add to...	IT Lead

For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

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FAILURE MODE IDENTIFICATION SHEET

FAILURE MODE IDENTIFICATION

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

FAILURE MODE IDENTIFICATION TABLE

Process Step	Failure Mode	Effect of	Potential Cause	Current Controls	Detection Method	Risk	Recommended Action	Owner

TEMPLATE 05 OF 14 · ANALYSE

FISHBONE DIAGRAM

WHAT IT IS

A Fishbone Diagram (Ishikawa / Cause-and-Effect Diagram) identifies potential causes of a problem across six categories: People/Man, Machine, Method/Process, Material, Measurement and Environment. Use it in the Analyse phase to organise root cause thinking before validation.

WHY WE USE IT

A Fishbone (Ishikawa) Diagram organises potential causes into categories — People, Machine, Method, Material, Measurement and Environment. It widens the team's thinking before narrowing to the most likely causes.

BENEFITS

- Prevents the team locking onto the first plausible cause
- Forces consideration of categories that are easy to overlook
- Produces a visual that can be challenged and refined by the wider team

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

FISHBONE DIAGRAM

Identify root causes across six key categories using a cause-and-effect structure. FISHBONE DIAGRAM

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS FISHBONE DIAGRAM?

A Fishbone Diagram (Ishikawa / Cause-and-Effect Diagram) identifies potential causes of a problem across six categories: People/Man, Machine, Method/Process, Material, Measurement and Environment. Use it in the Analyse phase to organise root cause thinking before validation.

Problem / Effect Complaint response time exceeds 3-day SLA (current avg: 5.2 days)

CAUSES BY CATEGORY

Enter causes identified for each of the six categories

Category	Cause 1	Cause 2	Cause 3	Cause 4	Cause 5
People / Man	No standard investigation checklist	Agent training gaps — complaint handling	Role confusion — unclear authority levels	High staff turnover disrupts continuity	
Machine	CRM not integrated with email channel	No real-time SLA alert or dashboard	Manual rekeying from online form	CRM system downtime (avg 2 hrs/wk)	
Method / Process	No triage checklist or standard process	No closure script — inconsistent comms	No FCR target or measurement in place	Complaint process designed for speed, not quality	
Material	No resolution toolkit for agents	Outdated policy documents in use	No FAQ or decision tree for common complaints	Missing escalation criteria document	
Measurement	No real-time KPI dashboard	CSAT survey response rate only 34%	FCR flag inconsistently applied by agents	No early-warning metric for SLA risk	
Environment	High volume: 47 complaints/day	Seasonal peaks not resourced	No priority system for urgent cases	Customers escalate directly to senior management	

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For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

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FISHBONE DIAGRAM

FISHBONE DIAGRAM

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Problem / Effect

CAUSES BY CATEGORY

Category	Cause 1	Cause 2	Cause 3	Cause 4	Cause 5
People / Man					
Machine					
Method / Process					
Material					
Measurement					
Environment					

GEMBA TIP

Go and see where the work happens

Gemba means going to the place where work is done. Whether you are walking a factory, warehouse, office or healthcare area, comfort matters during long observation sessions and improvement walks.

View SimplicityHub merchandise →

SIMPLICITYHUB HOODIE

SCAN OR TAP TO EXPLORE

View SimplicityHub merchandise

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TEMPLATE 06 OF 14 · ANALYSE

HYPOTHESIS TESTING PLANNER

WHAT IT IS

A Hypothesis Testing Planner documents each statistical test in a structured way: what you are testing, the null and alternative hypotheses, which test to use, the significance level, sample size required, the test result and your conclusion. Use this in the Analyse and Improve phases.

WHY WE USE IT

A Hypothesis Testing Planner structures the question, expected result, test, sample size and decision rule before running any test. It turns 'let's just try it' into evidence-based analysis.

BENEFITS

- Removes after-the-fact rationalisation of results
- Sets the threshold for what 'significant' means up front
- Builds an audit trail for analytical findings

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

HYPOTHESIS TESTING PLANNER

Plan, document and interpret statistical hypothesis tests. HYPOTHESIS TESTING PLANNER

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS HYPOTHESIS TESTING PLANNER?

A Hypothesis Testing Planner documents each statistical test in a structured way: what you are testing, the null and alternative hypotheses, which test to use, the significance level, sample size required, the test result and your conclusion. Use this in the Analyse and Improve phases.

HYPOTHESIS TESTS

Document H_0, H_1, test method, result and conclusion for each hypothesis

#	Hypothesis	H_0 — Null Hypothesis	H_1 — Alternative Hypothesis	Statistical Test	Alpha (α)	Sample Size	Test Result / Statistic	p-value	Conclusion
1	Complaint response time is positively correlated with escalation rate	No correlation between response time and escalation rate (ρ = 0)	Significant positive correlation exists (ρ > 0)	Pearson Correlation	0.05	n = 940	r = 0.72, p < 0.001	< 0.001	Reject H_0 — statistically significant
2	Agents using the investigation checklist have a lower repeat contact rate	No difference in repeat contact rate between checklist and non-checklist groups	Checklist group has a significantly lower repeat contact rate	Independent samples t-test	0.05	n = 30 per group	t = 3.21, p = 0.002	0.002	Reject H_0 — statistically significant
3	Complaint volume is significantly higher on Mondays and Fridays	Complaint volume is evenly distributed across weekdays (uniform distribution)	Complaint volume distribution is not uniform — peaks exist	Chi-square goodness of fit	0.05	n = 940	χ^2 = 28.4, df = 4	< 0.001	Reject H_0 — statistically significant
4	CSAT score is significantly lower for escalated complaints	No difference in CSAT score between escalated and non-escalated complaints	Escalated complaints have significantly lower CSAT scores	Mann-Whitney U	0.05	216 escalated; 724 standard	U = 28,412, p < 0.001	< 0.001	Reject H_0 — statistically significant

For downloadable templates go to https://www.simplicityhub.co.uk/templates.html
For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

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HYPOTHESIS TESTING PLANNER

HYPOTHESIS TESTING PLANNER

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

HYPOTHESIS TESTS

#	Hypothesis	H_0 — Null Hypothesis	Statistical Test	Alpha (α)	Sample Size	p-value	Conclusion
1				0.05			
2				0.05			
3				0.05			
4				0.05			

For downloadable templates go to https://www.simplicityhub.co.uk/templates.html
For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

TEMPLATE 07 OF 14 · ANALYSE

PARETO CHART

WHAT IT IS

A Pareto Chart applies the 80/20 rule to prioritise improvement effort. Enter categories and their frequencies, and the template ranks them and calculates cumulative percentages. Focus on the categories that together account for ≥80% of the total — these are your vital few.

WHY WE USE IT

A Pareto Chart applies the 80/20 rule visually — sorting categories by frequency so the few causes producing most of the problem stand out immediately.

BENEFITS

- Focuses improvement on the vital few, not the trivial many
- Converts long category lists into an obvious priority order
- Communicates priority instantly to non-technical stakeholders

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PARETO CHART

Identify the vital few causes driving the majority of problems using the 80/20 rule. PARETO CHART

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS PARETO CHART?

A Pareto Chart applies the 80/20 rule to prioritise improvement effort. Enter categories and their frequencies, and the template ranks them and calculates cumulative percentages. Focus on the categories that together account for ≥80% of the total — these are your vital few.

Metric / Analysis Focus Complaint category by volume Count Unit Complaints

DATA TABLE — SORTED DESCENDING BY COUNT

Vital-few rows (cumulative ≤ 80%) highlighted in blue

Rank	Category / Cause	Complaints	% of Total	Cumulative %	80% Status
1	Slow response / SLA breach	312	33.2%	33.2%	✓ Vital few (≤80%)
2	Poor communication at resolution	187	19.9%	53.1%	✓ Vital few (≤80%)
3	Incorrect information provided	143	15.2%	68.3%	✓ Vital few (≤80%)
4	Escalation process failures	98	10.4%	78.7%	✓ Vital few (≤80%)
5	Process failure / wrong outcome	72	7.7%	86.4%	Trivial many
6	Staff attitude or behaviour	54	5.7%	92.1%	Trivial many
7	System / technology issues	38	4.0%	96.2%	Trivial many
8	Other / unknown	36	3.8%	100.0%	Trivial many
	TOTAL	940	100%	100%	

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PARETO CHART

PARETO CHART

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Count Unit

DATA TABLE — SORTED DESCENDING BY COUNT

Rank	Category / Cause	Count	% of Total	Cumulative %	80% Status

TEMPLATE 08 OF 14 · ANALYSE

ROOT CAUSE ANALYSIS WORKSHEET

WHAT IT IS

The Root Cause Analysis Worksheet helps teams record each potential cause, assign it to a category, document supporting or refuting evidence, determine whether it is a true root cause, and define the corrective action. Only act on validated root causes.

WHY WE USE IT

A Root Cause Analysis Worksheet combines problem framing, cause exploration, evidence and conclusion into one structured page. It is a good catch-all when the situation is too complex for 5 Whys alone.

BENEFITS

- Forces a complete cause-analysis story on one sheet
- Records both the conclusion and the evidence behind it
- Becomes the reference document handed to solution designers

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

ROOT CAUSE ANALYSIS WORKSHEET

Identify, evaluate and validate root causes using data and evidence. RCA WORKSHEET

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS RCA WORKSHEET?

The Root Cause Analysis Worksheet helps teams record each potential cause

Problem Statement Average complaint response time is 5.2 days against a 3-day SLA target

CAUSE ANALYSIS TABLE

Document, evidence and classify each potential root cause

Potential Cause	Category	Evidence (supports / refutes)	Root Cause?	Action to Address	Owner
No investigation checklist or structure	Method / Process	Agent survey: 8/10 agents confirm no checklist; process audit confirms no...	Yes — root cause	Design and implement structured investigation checklist; embed in CRM closure screen	James Carter
CRM not integrated with email channel	Machine	CRM audit confirmed — all email complaints require manual rekeying;...	Yes — root cause	Initiate CRM integration project with IT; interim: email-to-CRM routing workflow	IT Lead
No SLA alert or real-time KPI dashboard	Machine	Confirmed by team — SLA breaches only identified in end-of-week review	Yes — root cause	Develop SLA alert in CRM; add to team leader daily dashboard by Week 4	IT Lead
Authority levels not defined — over-escalation	People / Man	23% escalation rate (target ≤10%); agent interviews confirm confusion over what...	Yes — root cause	Define and publish authority levels; include in team training and reference guide	James Carter
No standard resolution communication script	Method / Process	Mystery shop audit and CSAT verbatim confirm inconsistency in what...	Yes — root cause	Develop standard closure script; embed in process and include in training	Sarah Ahmed
CSAT survey response rate only 34%	Measurement	Survey tool data confirmed — non-response bias risk; survey sent at wrong time	No — contributing factor	Improve survey trigger timing; move to 24hrs post-closure; target >50% response rate	Sarah Ahmed
Agent training gaps — complaint handling skills	People / Man	Skills assessment: 7/12 agents rated below expected standard in...	Yes — root cause	Refresher training programme; include in Q2 L&D plan; prioritise agents below standard	James Carter
No FCR target or formal measurement in place	Measurement	KPI register confirmed — FCR not tracked; no target set; agents...	Yes — root cause	Set FCR KPI; include in team leader weekly reporting from Week 3 onwards	James Carter

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ROOT CAUSE ANALYSIS WORKSHEET

RCA WORKSHEET

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Problem Statement

CAUSE ANALYSIS TABLE

Potential Cause	Category	Action to Address	Owner

TEMPLATE 09 OF 14 · ANALYSE

Cause Shortlist

WHY WE USE IT

A Cause Shortlist is the lightweight follow-up to a Fishbone — narrowing the long list of possible causes down to the few worth validating with data.

BENEFITS

- Stops the team from trying to validate everything at once
- Makes prioritisation explicit and challengeable
- Sets up the Cause Validation Matrix that follows

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Cause Shortlist

SimplicityHub™ — Cause Shortlist

Narrow down a long list of possible causes to the vital few that the team will investigate or act on.

Stage: Analyse | Level: Beginner | Best for: Moving from brainstorming to focused investigation without losing track of ideas.

Possible Cause	Evidence For	Evidence Against	Data Available?	Impact (H/M/L)	Shortlisted ?	Next Step
Unclear work instructions	Staff interviews confirm confusion	None	Yes	H	Yes	Review current instructions

TEMPLATE 10 OF 14 · ANALYSE

Data Summary Sheet

WHY WE USE IT

A Data Summary Sheet condenses the project's raw data into the few statistics and charts the team will actually use. It is a working scratchpad, not a formal report.

BENEFITS

- Keeps key numbers in one place during analysis
- Speeds up team discussions — no need to dig through source files
- Becomes the source for the formal write-up later

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Data Summary Sheet

SimplicityHub™ — Data Summary Sheet

Summarise key findings from your data in one place so the team can see what the numbers are telling them.

Stage: Analyse | Level: Beginner | Best for: Pulling together analysis findings before moving into solution discussions.

Metric	Baseline Value	Target Value	Current Value	Gap	Key Finding	Data Source
Order accuracy %	87%	98%	91%	-7%	Most errors from manual entry step	Quality log Feb-Mar 2026

TEMPLATE 11 OF 14 · ANALYSE

Fishbone Starter

WHY WE USE IT

A Fishbone Starter is a pre-seeded Fishbone with prompts for each category — useful when the team has never run one before, or is stuck staring at a blank canvas.

BENEFITS

- Removes the 'where do we start' barrier in workshops
- Surfaces common causes the team might otherwise miss
- Gets a first draft on the wall in 10–15 minutes

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Fishbone Starter

SimplicityHub™ — Fishbone Diagram Starter

List potential causes under the six standard fishbone categories to identify what might be driving the problem.

Stage: Analyse | Level: Beginner | Best for: First-time users of cause and effect analysis who want a structured list format.

Category	Possible Cause	Evidence / Notes	Likely?	Worth Investigating?
Method	No standard process for order checking	Varies by shift	Yes	Yes
Manpower	New starters not fully trained	High error rate in first month	Yes	Yes
Machine	Scanner sometimes freezes	Reported twice last week	Maybe	Yes
Material	Labels peel off in heat	Seasonal issue	Maybe	No
Measurement	No daily accuracy check	Only checked monthly	Yes	Yes
Environment	Poor lighting in packing area	Staff mentioned in survey	Maybe	Yes

TEMPLATE 12 OF 14 · ANALYSE

Issue Log

WHY WE USE IT

An Issue Log records day-to-day problems, blockers and questions raised during the project — separate from formal risks. It prevents small things from quietly derailing momentum.

BENEFITS

- Stops issues being forgotten between meetings
- Gives every issue an owner and a due date
- Builds a history that informs lessons learned

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Issue Log

SimplicityHub™ — Issue Log

Record issues found during analysis so nothing is lost and the team can track each one to resolution.

Stage: Analyse | Level: Beginner | Best for: Keeping a simple running record of issues spotted during process observation or analysis.

Issue #	Date Found	Description	Where in Process	Impact (H/M/	Root Cause (if	Action Needed	Owner	Status
1	10/04/2026	Duplicate data entry into two systems	Order processing	M	No integration between systems	Investigate system link	A. Brown	Open

TEMPLATE 13 OF 14 · ANALYSE

Quick Pareto Log

WHY WE USE IT

A Quick Pareto Log is a simple tally of incidents by category that can be turned into a Pareto Chart with no statistical effort. Ideal for frontline teams.

BENEFITS

- Generates a Pareto-ready dataset in days
- Easy to operate without analyst support
- Often makes the biggest issue obvious without further analysis

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Quick Pareto Log

SimplicityHub™ — Quick Pareto Log

Tally defect types or complaint categories so the team can see which problems happen most often.

Stage: Analyse | Level: Beginner | Best for: Simple frequency counting before creating a Pareto chart or prioritising causes.

Category / Defect Type	Tally (count)	% of Total	Cumulative %	Notes
Wrong item sent	34	40%	40%	Mainly from warehouse A
Late delivery	22	26%	66%	Courier related
Damaged packaging	14	16%	82%	Fragile items only
Missing paperwork	8	9%	91%	International orders
Billing error	5	6%	97%	Manual invoice process
Other	3	3%	100%	

TEMPLATE 14 OF 14 · ANALYSE

Simple 5 Whys Worksheet

WHY WE USE IT

A Simple 5 Whys Worksheet is a single-page guided version of the 5 Whys for use in short meetings or on the shop floor. Same technique, less ceremony.

BENEFITS

- Makes root-cause thinking accessible to non-specialists
- Captures the reasoning chain, not just the conclusion
- Works in 10 minutes during a team huddle

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Simple 5 Whys Worksheet

SimplicityHub™ — Simple 5 Whys Worksheet

Work through five levels of "why" to uncover the root cause of a problem using a simple guided format.

Stage: Analyse | Level: Beginner | Best for: Teams new to root cause analysis who need a straightforward starting point.

Problem Statement	Why 1	Why 2	Why 3	Why 4	Why 5 (Root	Proposed Action	Owner	Date
Customer complaints about late delivery	Orders are shipped late	Picking takes too long	Items are hard to find in the warehouse	No clear labelling or location system	Warehouse layout was never standardised	Implement location labelling system	J. Smith	15/04/2026

MEASURE PHASE TIP

Stay focused through long data sessions

Data collection, measurement checks and root cause workshops can run for hours. Staying hydrated helps the team stay focused, practical and engaged while working through the evidence.

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SIMPLICITYHUB WATER BOTTLE

SCAN OR TAP TO EXPLORE

View SimplicityHub merchandise

https://www.simplicityhub.co.uk/pages/merchandise.html

STAGE 04 OF 05

IMPROVE

Design, pilot and implement the solution

The Improve stage turns insight into action. We generate solutions, prioritise them by impact and effort, pilot the strongest options, then roll them out with a clear plan. Good Improve work is disciplined — not a rush to implement the first idea.

TEMPLATES IN THIS STAGE

13 templates

The pages that follow take each improve template in turn. Read the description, the rationale and the benefits; study the completed example; then use the blank version to apply it to your own project.

TEMPLATE 01 OF 13 · IMPROVE

ACTION PLAN

WHAT IT IS

An Action Plan is a structured record of all tasks needed to implement the solution. For each action, record a clear description, the accountable owner, priority, due date, any dependencies and current status. Review regularly to track progress and remove blockers.

WHY WE USE IT

An Action Plan converts agreed solutions into specific actions with owners, dates and status. It is the operational backbone of the Improve stage.

BENEFITS

- Turns intentions into commitments with named owners
- Makes progress (or lack of it) visible at a glance
- Becomes the standing agenda for project team meetings

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

ACTION PLAN

Track actions, owners, priorities, due dates, dependencies and completion status. ACTION PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS ACTION PLAN?

An Action Plan is a structured record of all tasks needed to implement the solution. For each action, record a clear description, the accountable owner, priority, due date, any dependencies and current status. Review regularly to track progress and remove blockers.

Total actions 8 Complete 1 of 8 Overall progress 28%

ACTION REGISTER

Track all actions, owners, priorities and status

#	Action	Owner	Priority	Due	Dependenci	Status	Progres	Notes
1	Design and embed investigation checklist in CRM closure screen	James Carter	Critical	07 Apr 2026	—	In Progress	40%	Template drafted; CRM config pending
2	Redesign closure process to require root cause coding	James Carter	High	14 Apr 2026	1	Not Started	0%	Awaiting checklist sign-off
3	Develop and embed standard closure communication script	Sarah Ahmed	High	10 Apr 2026	—	In Progress	60%	Draft v2 in review with TLs
4	Publish authority level guide and distribute to team	James Carter	High	04 Apr 2026	—	Complete	100%	Distributed 02 Apr 2026
5	Develop real-time SLA alert and dashboard in CRM	IT Lead	High	30 Apr 2026	—	Not Started	0%	IT sprint planning w/c 07 Apr
6	Launch agent refresher training programme	L&D Lead	Medium	21 Apr 2026	1, 3	Not Started	0%	L&D brief submitted
7	CRM-email channel integration project kick-off	IT Lead	High	14 Apr 2026	—	In Progress	20%	Discovery phase underway
8	Improve CSAT survey trigger timing	IT Lead	Medium	28 Apr 2026	7	Not Started	0%	Depends on CRM integration work

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ACTION PLAN

ACTION PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Total actions	0	Complete	0 of 0	Overall progress	0%

ACTION REGISTER

#	Action	Owner	Priority	Due Date	Dependencies	Status	Progress	Notes

TEMPLATE 02 OF 13 · IMPROVE

CHANGE IMPLEMENTATION PLAN

WHAT IT IS

A Change Implementation Plan organises all activities needed to deploy the solution into workstreams. For each activity, record the key implementation steps, owner, planned start and end dates, dependencies, RAG status and completion status. Review weekly to maintain momentum and surface blockers early.

WHY WE USE IT

A Change Implementation Plan sequences how a solution will be rolled out — pilots, training, communications, cutover. It treats implementation as a project in its own right.

BENEFITS

- Reduces the disruption and rework of a poorly sequenced rollout
- Coordinates training, comms and cutover into one schedule
- Provides a milestone view sponsors can track

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

CHANGE IMPLEMENTATION PLAN

Track workstreams, change activities CHANGE IMPLEMENTATION PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY				
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter				
BUSINESS AREA	Customer Service								
WHAT IS CHANGE IMPLEMENTATION PLAN?	A Change Implementation Plan organises...								
RAG STATUS GUIDE			Green = on track · Amber = at risk —...						
CHANGE ACTIVITY REGISTER			Organised by workstream						
Workstream	Change Activity	Key Steps	Owner	Start Date	End Date	Dependencies	RAG	Status	Notes
Process	Implement investigation checklist in CRM	Agree checklist fields; CRM...	James Carter	28 Mar 2026	14 Apr 2026	—	Green	In Progress	Pilot underway w/c 01 Apr
Process	Redesign closure process — root...	Process redesign; CRM closure screen...	James Carter	04 Apr 2026	21 Apr 2026	1	Amber	Not Started	Awaiting checklist sign-off
Communication	Develop and embed standard...	Draft script; TL review; embed in...	Sarah Ahmed	28 Mar 2026	10 Apr 2026	—	Green	In Progress	Draft v2 with TLs
People	Publish authority levels and...	Draft levels; TL review;...	James Carter	01 Apr 2026	04 Apr 2026	—	Green	Complete	Distributed 02 Apr 2026
Technology	SLA alert and real-time dashboard in CRM	IT scoping; build; UAT; go-live	IT Lead	07 Apr 2026	30 Apr 2026	—	Amber	Not Started	IT sprint planning w/c 07 Apr
Technology	CRM-email channel integration project	Business requirements; IT build;...	IT Lead	07 Apr 2026	30 May 2026	—	Amber	In Progress	Discovery phase underway
People	Agent refresher training programme	L&D brief; content build;...	L&D Lead	14 Apr 2026	21 Apr 2026	1, 3	Red	Not Started	L&D brief submitted 02 Apr
Measurement	CSAT survey trigger timing...	IT config change; test; deploy	IT Lead	21 Apr 2026	28 Apr 2026	6	Amber	Not Started	Depends on CRM integration

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CHANGE IMPLEMENTATION PLAN

CHANGE IMPLEMENTATION PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

RAG STATUS GUIDE

CHANGE ACTIVITY REGISTER

Workstream	Change Activity	Key Steps	Owner	Start Date	End Date	Dependencies	RAG	Status	Notes

TEMPLATE 03 OF 13 · IMPROVE

COST BENEFIT ANALYSIS

WHAT IT IS

A Cost Benefit Analysis quantifies the expected financial benefits and costs of implementing a solution over a defined time horizon. One-time items appear only in Year 1; recurring items appear in Years 1–3. The summary calculates net benefit per year, cumulative net, 3-year ROI and payback period.

WHY WE USE IT

A Cost Benefit Analysis compares the financial cost of a solution against its expected benefits over time. It is the language sponsors and finance use to approve investment.

BENEFITS

- Justifies investment in objective financial terms
- Surfaces solutions that look attractive but aren't worth the cost
- Provides the basis for benefits tracking after go-live

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

COST BENEFIT ANALYSIS

Quantify all benefits and costs over a... COST BENEFIT ANALYSIS

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				
WHAT IS COST BENEFIT ANALYSIS?	A Cost Benefit Analysis quantifies...				
BENEFITS			Quantify one-time and...		
Description	Type	Year 1 (£)	Year 2 (£)	Year 3 (£)	
Agent efficiency gain — investigation...	Recurring	3,760	3,760	3,760	
Reduction in repeat contacts — 170...	Recurring	1,360	1,360	1,360	
Reduction in management...	Recurring	2,400	2,400	2,400	
Improved CSAT → reduced churn	Recurring	6,000	6,000	6,000	
Reduction in management...	One-time	4,200	—	—	
Total Benefits		£17,720	£13,520	£13,520	
COSTS			Quantify one-time (Year 1 only)...		
Description	Type	Year 1 (£)	Year 2 (£)	Year 3 (£)	
Investigation checklist design and CRM...	One-time	1,200	—	—	
Agent refresher training	One-time	1,800	—	—	
CRM-email integration project	One-time	8,500	—	—	
Real-time SLA alert development (IT)	One-time	2,400	—	—	

KEY METRICS

Total 3-Year Benefit £44,760
Total 3-Year Cost £17,100
Net Benefit (3 yr) £27,660
ROI (3-year) 162%
Payback Period Year 1

ASSUMPTIONS AND NOTES

Agent hourly rate: £16/hr.

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COST BENEFIT ANALYSIS

COST BENEFIT ANALYSIS

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

BENEFITS

Description	Type	Year 1 (£)	Year 2 (£)	Year 3 (£)
Total Benefits		—	—	—

COSTS

Description	Type	Year 1 (£)	Year 2 (£)	Year 3 (£)
Total Costs		—	—	—

SUMMARY

	Year 1 (£)	Year 2 (£)	Year 3 (£)
Total Benefits	—	—	—
Total Costs	—	—	—
Net Benefit	—	—	—
Cumulative Net	—	—	—

KEY METRICS

Total 3-Year Benefit —
Total 3-Year Cost —
Net Benefit (3 yr) —
ROI (3-year) N/A
Payback Period Year 1

ASSUMPTIONS AND NOTES

TEMPLATE 04 OF 13 · IMPROVE

IMPACT VS EFFORT MATRIX

WHAT IT IS

The Impact vs Effort Matrix places each potential solution into one of four quadrants based on its impact (1–10, higher = better) and effort required (1–10, higher = more effort). Quick Wins (high impact, low effort) should be actioned first. Hard Slogs (low impact, high effort) should be deprioritised or dropped.

WHY WE USE IT

An Impact vs Effort Matrix plots each candidate solution on a 2×2 grid — high impact / low effort solutions become obvious quick wins.

BENEFITS

- Makes prioritisation visual and intuitive for any audience
- Identifies quick wins that build momentum early
- Filters out 'big project, small return' ideas

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

IMPACT VS EFFORT MATRIX

Classify solutions by impact (1–10) and effort (1–10) to prioritise using the quick wins / major projects / fill-ins / hard slogs framework. IMPACT VS EFFORT MATRIX

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS IMPACT VS EFFORT MATRIX?

The Impact vs Effort Matrix places each potential solution into one of four quadrants based on its impact (1–10, higher = better) and effort required (1–10, higher = more effort). Quick Wins (high impact, low effort) should be actioned first. Hard Slogs (low impact, high effort) should be deprioritised or dropped.

QUADRANT GUIDE

Quick Wins High impact, low effort — do first

Major Projects High impact, high effort — plan and resource carefully

Fill-Ins Low impact, low effort — do if time and resource allow

Hard Slogs Low impact, high effort — deprioritise or drop

IDEA DATA TABLE

Impact = benefit if implemented (1 low → 10 very high) · Effort = resource / difficulty required (1 easy → 10 very hard)

#	Solution / Idea	Impact (1–10)	Effort (1–10)	Quadrant
1	Investigation checklist	9	2	Quick Wins
2	Standard closure communication script	8	2	Quick Wins
3	Publish authority levels guide	7	2	Quick Wins
4	Complaint triage checklist	7	2	Quick Wins
5	Agent refresher training programme	7	4	Quick Wins
6	Redesign closure process	8	3	Quick Wins
7	Improve CSAT survey trigger timing	5	3	Quick Wins
8	Knowledge base and FAQ for agents	6	5	Major Projects
9	Real-time SLA alert in CRM	8	6	Major Projects
10	CRM-email channel integration	9	9	Major Projects

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IMPACT VS EFFORT MATRIX

IMPACT VS EFFORT MATRIX

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

QUADRANT GUIDE

Quick Wins
Major Projects
Fill-Ins
Hard Slogs

IDEA DATA TABLE

#	Solution / Idea	Impact (1–10)	Effort (1–10)	Quadrant

TEMPLATE 05 OF 13 · IMPROVE

PILOT PLAN TEMPLATE

WHAT IT IS

A Pilot Plan defines the parameters for a controlled trial of a proposed solution. It establishes the pilot scope, objective, success criteria, key activities, data to be collected and the Go/No-Go decision criteria — ensuring the pilot generates valid, actionable results before full-scale implementation.

WHY WE USE IT

A Pilot Plan defines how a solution will be tested in a limited setting before full rollout — scope, success criteria, duration, measures. It prevents expensive full-scale failures.

BENEFITS

- Catches design flaws before they affect the whole business
- Generates real-world evidence for the rollout decision
- Builds confidence with sponsors before scaling

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PILOT PLAN TEMPLATE

Define the scope, activities PILOT PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

PILOT SUMMARY

Pilot Name Structured Investigation Checklist —...
Pilot Owner James Carter
Location / Scope Customer Service Team A (6 agents)
Duration 2 weeks (01 Apr – 14 Apr 2026)
Objective Validate that the investigation...
Scope (in / out) Team A (6 agents)

SUCCESS CRITERIA

Define measurable targets the...

Metric / Success Criterion	Target	Current Baseline			
Average complaint response time	≤ 3.5 days	5.2 days			
Repeat contact rate	≤ 30%	38%			
Customer CSAT score	≥ 72%	67%			
Agent usability rating	≥ 4 / 5	N/A — new process			
KEY ACTIVITIES			Ordered list of pilot activities with...		
#	Activity	Owner	Start Date	End Date	Notes
1	Week 0 — Team A briefing and...	James Carter	28 Mar 2026	31 Mar 2026	Briefing pack and demo
2	Week 1–2 — Live pilot with daily...	James Carter	01 Apr 2026	14 Apr 2026	Daily CRM data pull
3	Week 2 — Mid-point check-in...	James Carter	07 Apr 2026	07 Apr 2026	TL debrief; flag any issues
4	Data collation and statistical analysis	Data Analyst	14 Apr 2026	17 Apr 2026	Compare pilot vs control
5	Go/No-Go decision and executive review	Sarah Mitchell	18 Apr 2026	18 Apr 2026	Present results to sponsor

DATA TO COLLECT DURING PILOT

Response time per case (CRM)

PILOT RISKS AND MITIGATIONS

Risk Mitigation / Contingency
Pilot group volume higher than usual —... Pre-assess volume; scale scope...
Agents revert to old habits... Daily check-in; TL observation;...
Confounding factors Exclude outlier weeks in analysis;...

GO / NO-GO DECISION CRITERIA

At least 2 of 3 KPI success...

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PILOT PLAN TEMPLATE

PILOT PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

PILOT SUMMARY

Pilot Name
Pilot Owner
Location / Scope
Duration
Objective
Scope (in / out)

SUCCESS CRITERIA

Target Current Baseline

KEY ACTIVITIES

#	Activity	Owner	Start Date	End Date	Notes
1					
2					
3					
4					
5					

DATA TO COLLECT DURING PILOT

PILOT RISKS AND MITIGATIONS

Risk

GO / NO-GO DECISION CRITERIA

TEMPLATE 06 OF 13 · IMPROVE

RISK MITIGATION PLAN

WHAT IT IS

A Risk Mitigation Plan documents each risk, scores it by likelihood (1–5) and impact (1–5), calculates the risk score (L × I, max 25) and defines a mitigation action to reduce the risk and a contingency plan in case the risk materialises. Review regularly throughout the project.

WHY WE USE IT

A Risk Mitigation Plan takes each significant project risk and specifies the preventative action, contingency, owner and trigger. It turns the risk register into an active management tool.

BENEFITS

- Moves risks from 'logged' to 'managed'
- Names an owner and trigger for each contingency
- Reduces the chance of a risk becoming an issue

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First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

RISK MITIGATION PLAN

Identify RISK MITIGATION PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS RISK MITIGATION PLAN?

A Risk Mitigation Plan documents each risk

RISK SCORE GUIDE (L × I)

1–2 Very Low · 3–5 Low · 6–11 Medium · 12–19...

RISK REGISTER

Score Likelihood and Impact 1 (very unlikely / minor) → 5

Risk	Category	L (1–	I (1–	Score	Mitigation	Contingency	Owner	Target Date	Residual	Status
Pilot fails to achieve KPI targets	Process	2	4	8 Medium	Pilot design checklist; pre-pilot agent...	Revert to current process; investigate root...	James Carter	14 Apr 2026	Medium	Active
CRM integration project exceeds budget or timeline	Technology	3	4	12 High	Detailed IT scoping; resource sign-off before start	Prioritise interim email workflow; escalate...	IT Lead	30 Apr 2026	Medium	Active
Agent resistance to new investigation process	People	2	3	6 Medium	Involve agents in checklist design;...	Investigate concerns; adjust process based on feedback	James Carter	07 Apr 2026	Low	Active
Low CSAT survey response rate continues to distort data	Measurement	3	3	9 Medium	Survey trigger fix and timing change; target...	Accept lower sample during transition; review monthly	IT Lead	28 Apr 2026	Low	Active
Project scope creep — additional change requests added	Project	3	3	9 Medium	Change control process; scope document...	Defer out-of-scope items to Phase 2; escalate to sponsor	James Carter	Ongoing	Low	Active

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RISK MITIGATION PLAN

RISK MITIGATION PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

RISK SCORE GUIDE (L × I)

RISK REGISTER

Risk	Category	L (1–5)	I (1–5)	Score	Mitigation	Contingency	Owner	Target Date	Residual	Status

TEMPLATE 07 OF 13 · IMPROVE

Before and After Comparison

WHY WE USE IT

A Before and After Comparison shows the same metrics pre- and post-change side by side. It is the simplest, most credible way to show improvement.

BENEFITS

- Makes improvement undeniable in a single view
- Communicates success to any audience without analysis skills
- Becomes the headline asset for the final project sign-off

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Before and After Comparison

SimplicityHub™ — Before & After Comparison

Document what the process looked like before and after the change so improvements are clearly visible.

Stage: Improve | Level: Beginner | Best for: Showing stakeholders the difference an improvement has made in a simple side-by-side view.

Process Area	Before (Current State)	After (Future State)	Improvement	How Measured	Evidence
Order checking	Manual check, 3 mins per order	Barcode scan, 45 secs per order	75% time reduction	Time study	Study completed 01/04/2026

TEMPLATE 08 OF 13 · IMPROVE

Change Checklist

WHY WE USE IT

A Change Readiness Checklist verifies that everything needed for a successful change — people, process, system, communication — is in place before go-live.

BENEFITS

- Catches missing prerequisites while there is still time to fix them
- Prevents 'we forgot to tell X' style failures at cutover
- Provides a sign-off trail for sponsors

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Change Checklist

SimplicityHub™ — Change Readiness Checklist

Check whether the team, process and environment are ready before implementing a change.

Stage: Improve │ Level: Beginner │ Best for: Avoiding surprises on go-live day by thinking through readiness in advance.

Readiness Area	Question	Yes / No / Partial	Action Needed	Owner	Due Date
Training	Has everyone been trained on the new process?	Partial	Run session for night shift	L. Harris	14/04/2026
Communication	Do all affected staff know the change is happening?	Yes	None	-	-
Equipment	Is all equipment tested and in place?	No	Order 2 additional scanners	M. Patel	12/04/2026
Documentation	Are updated work instructions available?	Partial	Finish v2 of SOP	K. Jones	13/04/2026
Sign-off	Has the process owner approved go-live?	No	Schedule review meeting	Project Lead	11/04/2026
Contingency	Is there a rollback plan if it does not work?	Yes	Documented in project file	-	-

TEMPLATE 09 OF 13 · IMPROVE

Quick Win Tracker

WHY WE USE IT

A Quick Win Tracker logs small, low-effort improvements implemented during the project.

BENEFITS

- Captures value early, before the main solution lands
- Builds stakeholder confidence in the project's ability to deliver
- Creates a short, visible list of 'things already better'

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Quick Win Tracker

SimplicityHub™ — Quick Win Tracker

Track small, fast improvements that can be done immediately without waiting for the full project to finish.

Stage: Improve │ Level: Beginner │ Best for: Building early momentum and showing visible progress while bigger changes are planned.

Quick Win	Problem It	Owner	Date Identified	Target Date	Done?	Result
Move printer closer to packing desk	Walking time between prints	T. Wilson	05/04/2026	08/04/2026	Yes	Saved 12 mins per shift

TEMPLATE 10 OF 13 · IMPROVE

Simple Solution List

WHY WE USE IT

A Simple Solution List is a brainstormed inventory of candidate solutions, ready to be evaluated by Impact vs Effort or a prioritisation matrix.

BENEFITS

- Gets every idea on the table before evaluation begins
- Encourages breadth — divergent thinking before convergent
- Becomes the input for solution prioritisation

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Simple Solution List

SimplicityHub™ — Simple Solution List

Capture all potential solutions in one place so the team can compare options before deciding what to try.

Stage: Improve │ Level: Beginner │ Best for: Collecting and organising ideas from brainstorming before formal selection.

Solution Idea	What It Would	Ease (Easy/Med/Hard)	Cost (Low/Med/High)	Impact (Low/Med/High)	Quick Win?	Notes
Add barcode scanning at packing	Wrong item errors	Med	Med	High	No	Needs hardware purchase

TEMPLATE 11 OF 13 · IMPROVE

Stakeholder Feedback Log

WHY WE USE IT

A Stakeholder Feedback Log captures comments, concerns and suggestions raised by stakeholders during the project, with status and owner.

BENEFITS

- Stops feedback being lost between meetings
- Shows stakeholders their input is taken seriously
- Surfaces patterns that may reveal hidden resistance or unmet needs

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Stakeholder Feedback Log

SimplicityHub™ — Stakeholder Feedback Log

Record feedback from stakeholders about proposed changes so concerns are captured and addressed properly.

Stage: Improve | Level: Beginner | Best for: Making sure voices are heard and objections are managed before rolling out changes.

Stakeholder	Role	Date	Feedback / Concern	Support Level	Action Taken	Resolved ?
Sarah K.	Shift Supervisor	10/04/2026	Worried about extra steps slowing things down	3	Showed time comparison data	Yes

TEMPLATE 12 OF 13 · IMPROVE

SOLUTION PRIORITISATION MATRIX

WHAT IT IS

The Solution Prioritisation Matrix helps teams objectively compare and rank solutions by scoring each against Impact, Feasibility, Cost, Speed and Risk (all rated 1–5, where 5 = most favourable). The total score (max 25) produces a ranked list to guide solution selection in the Improve phase.

WHY WE USE IT

A Solution Prioritisation Matrix scores each candidate solution against multiple weighted criteria — impact, effort, risk, alignment — to produce a defensible ranking.

BENEFITS

- Removes 'who shouted loudest' from solution selection
- Makes the criteria — and their weights — explicit
- Produces a ranking that can be defended to sponsors

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

SOLUTION PRIORITISATION MATRIX

Score solutions against five criteria to identify and rank priority options. SOLUTION PRIORITISATION MATRIX

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS SOLUTION PRIORITISATION MATRIX?

The Solution Prioritisation Matrix helps teams objectively compare and rank solutions by scoring each against Impact, Feasibility, Cost, Speed and Risk (all rated 1–5, where 5 = most favourable). The total score (max 25) produces a ranked list to guide solution selection in the Improve phase.

Scoring guide Impact: 5 = very high · Feasibility: 5 = very easy · Cost: 5 = very low cost · Speed: 5 = very fast · Risk: 5 = very low risk

SCORED & RANKED SOLUTIONS

Sorted by total score descending — top 3 ranked solutions highlighted

Rank	Solution / Option	Impact (1–5)	Feasibility (1–5)	Cost (1–	Speed (1–	Risk (1–	Score /25	Notes
1	Implement structured investigation checklist	5	5	5	5	5	25	Quick win — high impact, low cost, agent-driven
2	Develop standard closure communication script	4	5	5	5	5	24	Very quick win; minimal resource required
3	Define and publish authority levels	3	5	5	5	5	23	Quick win: guidance doc, comms and briefing
4	Redesign closure process — require root cause coding	5	5	4	4	5	23	High impact; minor process change
5	Agent refresher training programme	4	5	3	4	4	20	Quick to deploy; L&D resource needed
6	Improve CSAT survey trigger timing	3	4	4	4	5	20	Low risk; improves measurement quality
7	Deploy real-time SLA alert in CRM	4	4	3	3	4	18	Dependent on IT sprint resource
8	CRM-email channel integration project	5	3	2	2	3	15	High impact but IT project required

For downloadable templates go to https://www.simplicityhub.co.uk/templates.html
For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

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SOLUTION PRIORITISATION MATRIX

SOLUTION PRIORITISATION MATRIX

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Scoring guide

SCORED & RANKED SOLUTIONS

Rank	Solution / Option	Impact (1–5)	Feasibility (1–5)	Cost (1–5)	Speed (1–5)	Risk (1–5)	Notes

TEMPLATE 13 OF 13 · IMPROVE

SOLUTION TESTING PLAN

WHAT IT IS

A Solution Testing Plan documents every test needed to validate the solution before full-scale implementation. For each test case, define what is being tested, the acceptance criteria (the definition of pass), the test method, data required, owner and planned date. Record the result and outcome once the test has been run.

WHY WE USE IT

A Solution Testing Plan defines what 'success' looks like for the pilot, the tests that will be run, and the decision rules for whether to proceed.

BENEFITS

- Sets the bar for go/no-go before emotions get involved
- Forces structured testing rather than 'see how it goes'
- Generates clear evidence for the rollout decision

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

SOLUTION TESTING PLAN

Define test cases with... SOLUTION TESTING PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS SOLUTION TESTING PLAN?

A Solution Testing Plan documents every...

Total	8	Pass	2	Fail	0	Pendin	6			
TEST CASE REGISTER			Document							
Test ID	Test Name	What Is Being Tested	Acceptance Criteria	Test Method	Data Required	Owner	Planned Date	Result	Outcome / Observations	Notes
TC-01	Checklist Usability Test	Investigation checklist can be...	Avg completion time ≤ 2 minutes; agent...	Timed observation with 3 agents;...	Draft checklist; 3 test complaints	James Carter	01 Apr 2026	Pass	Avg 1.6 min; minor label edits made	Passed with minor edits
TC-02	CRM Checklist Integration UAT	Checklist fields save correctly in CRM...	100% of test cases save all checklist...	End-to-end UAT in CRM test environment	CRM test environment; test case list	IT Lead	05 Apr 2026	Pending	—	Pending IT build
TC-03	SLA Alert — Trigger Accuracy	SLA alert fires within 15 minutes of a...	100% trigger accuracy across 20...	Create test cases; time alert...	CRM test environment	IT Lead	08 Apr 2026	Pending	—	Pending IT build
TC-04	Closure Script — Customer Response	Customers rate communication ≥ 4/5...	Post-call survey rating ≥ 4/5 for ≥...	Mystery shop (6 calls); post-call survey	Agent script; mystery shopper;...	Sarah Ahmed	10 Apr 2026	Pending	—	Awaiting script sign-off
TC-05	Pilot — Response Time	Pilot group achieves average complaint...	Avg response time ≤ 3.5 days	2-week controlled pilot; data...	Pilot group live cases (Team A)	James Carter	14 Apr 2026	Pending	—	Pilot 01–14 Apr
TC-06	Pilot — Repeat Contact Rate	Pilot group repeat contact rate...	Repeat contact rate ≤ 30%	2-week pilot; CRM repeat contact...	Same live cases as TC-05	James Carter	14 Apr 2026	Pending	—	Pilot 01–14 Apr
TC-07	Pilot — CSAT Score	Pilot group CSAT score improves to...	CSAT score ≥ 72% (current baseline: 67%)	Post-resolution CSAT survey data	CSAT survey data; pilot period filter	Data Analyst	14 Apr 2026	Pending	—	Pending pilot completion
TC-08	Authority Guide — Knowledge Check	90% of agents correctly identify their...	≥ 90% of agents score ≥ 4/5 on...	Written knowledge check (5 scenarios)	Authority guide; knowledge check form	James Carter	05 Apr 2026	Pass	11/12 agents 5/5; 1 agent 4/5	Passed — 92%

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SOLUTION TESTING PLAN

SOLUTION TESTING PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

Total	0	Pass	0	Fail	0	Pending	0

	Acceptance Criteria	Data Required	Owner	Planned Date	Result	Notes

STAGE 05 OF 05

CONTROL

Lock in the gains and hand the process over

The Control stage protects the improvement. We standardise the new way of working, monitor key metrics, build escalation routes, and formally hand the process to the business. Without Control, processes drift back to baseline within months.

TEMPLATES IN THIS STAGE

12 templates

The pages that follow take each control template in turn. Read the description, the rationale and the benefits; study the completed example; then use the blank version to apply it to your own project.

TEMPLATE 01 OF 12 · CONTROL

AUDIT CHECKLIST

WHAT IT IS

An Audit Checklist is used to conduct a structured review of whether the improved process is being followed as intended. For each item, record the category, the audit question or item, whether it is compliant (Yes/No/Partial/N/A), the evidence observed, any findings or gaps, the corrective action required, the owner and the due date. Use audit results to identify and address slippage early.

WHY WE USE IT

An Audit Checklist is a periodic verification that the new process is being followed as designed and producing the expected results.

BENEFITS

- Catches process drift before it becomes performance loss
- Gives operational leaders a structured way to spot-check
- Creates an audit trail for governance and compliance

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

AUDIT CHECKLIST

Conduct a structured process audit —... AUDIT CHECKLIST

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS AUDIT CHECKLIST?

An Audit Checklist is used to conduct a...

Items audited 9 Yes 7 No 1 Partial 1 Compliance % 78%

AUDIT FINDINGS REGISTER

Complete one row per audit item

Category	Audit Item	Compliant ?	Evidence	Findings	Corrective Action	Owner	Due Date
Process Compliance	Investigation checklist completed for 100%...	Yes	10/10 sampled cases had checklist...	—	—	—	—
Process Compliance	Root cause coded at closure for 100%...	Partial	9/10 cases coded; 1 case missing root cause code	1 agent did not apply root cause code —...	Coach agent on return; re-audit this...	CS Team Lead	01 May 2026
Controls	I-MR control chart reviewed weekly by...	Yes	Run chart reviewed w/e 05 Apr 2026 — no control...	—	—	—	—
Controls	CRM SLA alert active and triggering correctly at...	Yes	IT confirmed alert active; tested 07 Apr...	—	—	—	—
Documentation	SOP CS-SOP-001 v1.0 accessible to all...	Yes	Available on intranet; 3 agents asked to...	—	—	—	—
Documentation	Authority levels guide published and current	Yes	Published 02 Apr 2026; confirmed...	—	—	—	—
Training	All CS agents (12) have completed investigation...	Yes	12/12 agents on training register;...	—	—	—	—
Data & Reporting	CSAT survey trigger firing at correct...	No	Survey currently firing at 3-day resolution point	Survey trigger timing not yet corrected — IT...	IT to deploy trigger update by 28 Apr 2026 —...	IT Lead	28 Apr 2026
Data & Reporting	Monthly performance dashboard shared with...	Yes	Dashboard distributed to CS manager and...	—	—	—	—

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AUDIT CHECKLIST

AUDIT CHECKLIST

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

AUDIT FINDINGS REGISTER

Category	Audit	Evidence	Findings	Corrective	Owner	Due

TEMPLATE 02 OF 12 · CONTROL

CONTROL PLAN

WHAT IT IS

A Control Plan documents how each Critical-to-Quality (CTQ) characteristic will be measured, monitored and controlled after improvement. For each process step, define the CTQ, the specification or target, how it is measured, how frequently, the sample size, the control method (e.g. control chart, CRM alert, audit), the owner, and the reaction plan to follow if the CTQ goes out of specification.

WHY WE USE IT

A Control Plan documents the key process metrics, their specification limits, monitoring methods, and reaction plans. It is the operating manual for sustaining improvement.

BENEFITS

- Translates the improvement into day-to-day operating discipline
- Defines exactly what to do when a metric drifts
- Survives team changes — the discipline lives in the document

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

CONTROL PLAN

Specify how each CTQ will be measured, controlled and what the reaction plan is if it goes out of specification. CONTROL PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS CONTROL PLAN?

A Control Plan documents how each Critical-to-Quality (CTQ) characteristic will be measured, monitored and controlled after improvement.

CONTROL PLAN REGISTER

Complete one row per CTQ / process step

Process Step	CTQ / Characteristic	Specification / Target	Measurement Method	Frequency	Sample Size	Control Method	Owner	Reaction Plan (if out of spec)
1 — Complaint receipt & acknowledgement	Acknowledgement time	≤ 4 hours from receipt	CRM timestamp (case open → ack sent)	Daily auto-report	All cases	CRM SLA alert + real-time dashboard	CS Team Lead	If ≥ 5 breaches in one day: investigate reason and escalate to manager
2 — Investigation (checklist)	Checklist completion rate	100% of cases	CRM mandatory completion field	Real-time (CRM)	All cases	CRM mandatory field — cannot close case without completing	CS Agent / Team Lead	If rate drops below 95%: TL spot-check + coaching session within 2 days
3 — Resolution & closure	Time to resolution (TTR)	≤ 3.5 days average	CRM case open → close date	Weekly I-MR chart	All closed cases	I-MR Control Chart on TTR — reviewed weekly	Process Owner	3 consecutive points above UCL: RCA and escalate to CS manager
4 — Root cause coding	Root cause recorded at closure	100% of closed cases coded	CRM closure screen mandatory field	Monthly audit sample (n=30)	30 sampled cases	CRM mandatory field + monthly audit	CS Agent / CS Team Lead	If >5% uncoded in audit: system alert + TL review + coaching
5 — CSAT survey	Customer satisfaction score (CSAT)	≥ 72% (target; current 67%)	Post-resolution CSAT survey	Monthly average	Target ≥ 50% response rate	Monthly run chart — Process Owner reviews	Process Owner	If CSAT below 70% for 2 consecutive months: RCA + senior review

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CONTROL PLAN

CONTROL PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

CONTROL PLAN REGISTER

Process Step	CTQ / Characteristic	Measurement Method	Frequency	Sample Size	Control Method	Owner

TEMPLATE 03 OF 12 · CONTROL

HANDOVER CHECKLIST

WHAT IT IS

A Handover Checklist ensures that everything required to sustain the improved process has been put in place before the project team hands responsibility back to the process owner. Use this to confirm: documentation is complete and accessible; training has been delivered; controls are active; data and reporting is in place; technology changes are live; stakeholders have been communicated with; and ongoing actions have been assigned.

WHY WE USE IT

A Handover Checklist confirms that everything required to run the new process — documentation, training, dashboards, ownership — has been transferred to the business.

BENEFITS

- Prevents the 'project ends, problem returns' pattern
- Forces explicit acceptance by the receiving team
- Creates a clean closure point for the project

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

HANDOVER CHECKLIST

Confirm all documentation, training HANDOVER CHECKLIST

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY		
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter		
BUSINESS AREA	Customer Service						
WHAT IS HANDOVER CHECKLIST?	A Handover Checklist ensures...						
Total items	18	Complete	17	Not Complete	1	% Ready	94%
HANDOVER CHECKLIST ITEMS			Record status for each item — Complete				
Category	Checklist Item	Status	Notes				
Documentation	SOP (CS-SOP-001 v1.0) finalised and...	Complete	Published 01 Apr 2026 — accessible to...				
Documentation	Authority levels and escalation...	Complete	Distributed 02 Apr 2026				
Documentation	Standard closure communication...	Complete	v2 approved and uploaded 03 Apr 2026				
Documentation	Control Plan reviewed and signed off...	Complete	Signed off by James Carter 05 Apr 2026				
Training	All 12 CS agents trained on...	Complete	100% attendance — training records filed				
Training	Agent refresher training programme...	Complete	Delivered week of 21 Apr 2026				
Training	Team Lead trained on CRM...	Complete	Briefed 01 Apr 2026				
Process & Controls	Investigation checklist embedded as...	Complete	Confirmed live and mandatory...				
Process & Controls	Root cause coding dropdown active as...	Complete	Confirmed with IT — live from...				
Process & Controls	CRM SLA alert triggering correctly at...	Complete	IT confirmed active and tested...				
Data & Reporting	Monthly performance dashboard template...	Complete	Dashboard distributed 02 Apr 2026;...				
Data & Reporting	I-MR control chart for TTR set up...	Complete	Chart set up by Process Owner;...				

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HANDOVER CHECKLIST

HANDOVER CHECKLIST

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

HANDOVER CHECKLIST ITEMS

Category	Checklist Item	Status	Notes

TEMPLATE 04 OF 12 · CONTROL

LESSONS LEARNED LOG

WHAT IT IS

A Lessons Learned Log captures the key learning points from a project — both positive and negative — so future project teams can build on what worked and avoid what didn't. For each lesson, record the category, DMAIC phase, what happened, the impact, the type (positive/negative/neutral), the root cause, the owner, and the recommendation for future projects.

WHY WE USE IT

A Lessons Learned Log captures what worked, what didn't, and what should be done differently next time — for future projects to benefit from.

BENEFITS

- Compounds organisational learning across projects
- Surfaces process improvements for the improvement function itself
- Honours the time the team invested by extracting reusable insight

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

LESSONS LEARNED LOG

Capture what went well, what didn't LESSONS LEARNED LOG

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS LESSONS LEARNED LOG?

A Lessons Learned Log captures the key...

Total lessons 8 Positive 4 Negative 4

LESSONS LEARNED REGISTER

Complete one row per lesson learned

Category	DMAIC Phase	Impact	What Happened	Type	Root Cause	Owner	Recommendation for Future Projects
Process	Improve	High	Involving front-line agents in checklist design...	Positive	Agents felt ownership of the change	James Carter	Always co-design process tools with the people who...
Measurement	Measure	High	CSAT response rate of 24% was too low to produce...	Negative	Survey trigger fired too early in the resolution...	Data Analyst	Validate measurement systems thoroughly before relying...
Project Management	Define	Medium	Initial problem statement was too broad — needed to be...	Negative	Insufficient VOC data at project start; scope set...	James Carter	Invest more time in VOC and problem scoping —...
Process	Analyse	High	Pareto analysis of root causes revealed 3...	Positive	Good quality baseline CRM data; well-structured...	James Carter	Always run Pareto analysis before solution...
Technology	Improve	High	CRM integration project took approximately...	Negative	IT resource allocation not confirmed before project...	IT Lead	Get written confirmation of IT resource availability and...
People	Improve	Medium	Agent refresher training had 100% attendance and very...	Positive	Good L&D brief, clear scheduling	L&D Lead	Schedule training during quieter periods —...
Measurement	Improve	Medium	2-week pilot period was insufficient to capture enough...	Negative	CSAT survey trigger not yet fixed when pilot ran —...	James Carter	Fix measurement systems before running the...
Project Management	Control	High	Weekly project reviews maintained team momentum and...	Positive	Clear agenda, pre-read discipline	Process Owner	Embed weekly reviews into the Control Plan — name...

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LESSONS LEARNED LOG

LESSONS LEARNED LOG

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

LESSONS LEARNED REGISTER

Category	DMAIC Phase	Impact	Type	Root Cause	Owner

TEMPLATE 05 OF 12 · CONTROL

MONITORING DASHBOARD

WHAT IT IS

A Monitoring Dashboard provides a single view of the key performance indicators (KPIs) being tracked after the project. For each KPI, record the description, owner, target, current and previous values, trend direction (improving/stable/declining), RAG status (Green/Amber/Red), data source, review frequency and any notes. Review this dashboard at the agreed frequency to identify KPIs that need attention or escalation.

WHY WE USE IT

A Monitoring Dashboard shows the key metrics for the improved process at a glance, refreshed on a regular cadence. It is the day-to-day eyes on performance.

BENEFITS

- Makes drift visible immediately, not at the next quarterly review
- Gives operational owners a single screen for status
- Cuts the time from problem to detection from weeks to hours

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

MONITORING DASHBOARD

Track KPIs with targets, current performance MONITORING DASHBOARD

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS MONITORING DASHBOARD?

A Monitoring Dashboard provides a single view of the key...

KPIs tracked 7 Green 1 Amber 6 Red 0

KPI REGISTER

Complete one row per KPI

KPI	Description	Owner	Target	Current	Previous	Trend	RAG	Data Source	Review Freq.	Notes
Average Response Time (TTR)	Average days from complaint receipt to case closure	James Carter	≤ 3.5 days	3.8 days	5.2 days	↑ Improving	Amber	CRM weekly report	Weekly	Approaching target — pilot effect visible.
Repeat Contact Rate	% of cases where customer contacts again within 30 days	James Carter	≤ 30%	34%	38%	↑ Improving	Amber	CRM repeat contact flag	Monthly	Improving — closure script and authority levels...
CSAT Score	Customer satisfaction score — post-resolution survey	James Carter	≥ 72%	69%	67%	↑ Improving	Amber	Post-resolution CSAT survey	Monthly	CSAT survey trigger not yet fixed — response rate low.
Checklist Completion Rate	% of complaints with investigation checklist completed	CS Team Lead	100%	97%	N/A	→ Stable	Amber	CRM mandatory field audit	Weekly	3% gap traced to 1 agent — coaching session scheduled.
First Contact Resolution (FCR)	% of complaints resolved without requiring escalation	CS Team Lead	≥ 65%	62%	58%	↑ Improving	Amber	CRM escalation flag	Monthly	Improving following authority levels publication and...
Escalation Rate	% of complaints escalated to management	CS Team Lead	≤ 8%	11%	14%	↑ Improving	Amber	CRM escalation field	Monthly	Reducing — authority levels guide enabling agents to resolve...
Average Handling Time (AHT)	Average agent time spent on a complaint (investigation + closure)	CS Team Lead	≤ 12 min	10.5 min	13.2 min	↑ Improving	Green	CRM case timer	Weekly	Ahead of target — checklist is guiding agents more efficiently.

For downloadable templates go to https://www.simplicityhub.co.uk/templates.html
For simulated calculators go to https://www.simplicityhub.co.uk/tools.html

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MONITORING DASHBOARD

MONITORING DASHBOARD

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

KPI REGISTER

KPI	Description	Owner	Target	Current	Previous	Trend	RAG	Data Source	Notes

TEMPLATE 06 OF 12 · CONTROL

PROJECT CLOSURE REPORT

WHAT IT IS

A Project Closure Report formally closes the project and summarises everything achieved. It covers: project details (dates, team); project summary; objectives vs results; financial summary (benefits and costs); what went well and could be improved; key lessons learned; outstanding actions and next steps; and formal sign-off by the project manager, sponsor and process owner.

WHY WE USE IT

A Project Closure Report formally ends the project — summarising results vs goal, benefits delivered, key learnings and ownership of the new process.

BENEFITS

- Provides a definitive record of what was achieved
- Confirms benefits realisation to sponsors and finance
- Marks the boundary between project and business-as-usual

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

PROJECT CLOSURE REPORT

Formal project closure document —... PROJECT CLOSURE REPORT

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

PROJECT DETAILS

Planned Start Date 05 Jan 2026
Planned End Date 28 Mar 2026
Actual Closure Date 04 Apr 2026
Project Manager James Carter
Sponsor Sarah Mitchell
Department Customer Service

TEAM MEMBERS

James Carter (Project Manager)

PROJECT SUMMARY — WHAT WAS DONE AND DELIVERED

A Lean Six Sigma Improve project...

OBJECTIVES AND RESULTS

How did actual results compare...

Objective	Target	Result / Actual	Status
Reduce average complaint response time	≤ 3.5 days	3.8 days (post-pilot; continuing...	Partially Achieved
Improve first contact...	≥ 65%	62% — improving trend; not yet at target	Partially Achieved
Investigation checklist compliance	100%	97% (1 agent gap — coaching in progress)	Partially Achieved
CSAT score	≥ 72%	69% — improving from baseline of 67%	Partially Achieved
Control plan and SOP in place and live	By 01 Apr 2026	Completed 01 Apr 2026	Achieved

FINANCIAL SUMMARY

Target Annual Benefit £180,000 per year
Realised Benefit (to date) Estimated £95,000 annualised in...
Benefit Notes Benefits realisation review scheduled...
Projected Project Cost £28,500 (project management time
Actual Project Cost £31,200 (IT CRM integration took...
Cost Notes Budget overrun driven by IT resource...

WHAT WENT WELL

Co-design of the investigation...

WHAT COULD BE IMPROVED

Problem statement scope was too broad...

KEY LESSONS LEARNED — FOR FUTURE PROJECT TEAMS

Always co-design process tools with the...

OUTSTANDING ACTIONS (OWNER AND DUE DATE)

IT to deploy CSAT survey trigger...

NEXT STEPS / PHASE 2

3-month benefits realisation review...

SIGN-OFF

Formal closure confirmation

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PROJECT CLOSURE REPORT

PROJECT CLOSURE REPORT

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

PROJECT DETAILS

Planned Start Date
Planned End Date
Actual Closure Date
Project Manager
Sponsor
Department

TEAM MEMBERS

PROJECT SUMMARY — WHAT WAS DONE AND DELIVERED

OBJECTIVES AND RESULTS

Objective	Target	Result / Actual	Status

FINANCIAL SUMMARY

Benefit Notes

Actual Project Cost
Cost Notes

KEY LESSONS LEARNED — FOR FUTURE PROJECT TEAMS

OUTSTANDING ACTIONS (OWNER AND DUE DATE)

NEXT STEPS / PHASE 2

SIGN-OFF

Sign-Off Date
Sign-Off Notes

TEMPLATE 07 OF 12 · CONTROL

Daily Check Sheet

WHY WE USE IT

A Daily Check Sheet is the simplest possible Control tool — a short list of items to verify each day to confirm the process is running as designed.

BENEFITS

- Embeds the discipline of the improvement into daily routines
- Catches small deviations before they compound
- Requires no system — just a printed sheet and a pen

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Daily Check Sheet

SimplicityHub™ — Daily Check Sheet

Use a simple daily checklist to make sure the new process is being followed correctly after go-live.

Stage: Control │ Level: Beginner │ Best for: Embedding new habits in the first weeks after a change has gone live.

Check Item	Mon	Tue	Wed	Thu	Fri	Issue	Action Taken
Barcode scanned before packing	✓	✓	✓	×	✓	Yes — Thu	Scanner battery died, replaced

TEMPLATE 08 OF 12 · CONTROL

Escalation Guide

WHY WE USE IT

An Escalation Guide tells operational staff exactly when and to whom to escalate when a metric breaches its limits or an issue arises.

BENEFITS

- Removes hesitation about escalating — the rules are written down
- Speeds up response to problems by naming the right person
- Reduces the chance of issues being absorbed and hidden

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Escalation Guide

SimplicityHub™ — Escalation Guide

Define what to do when performance drops or issues arise so the team knows how to respond quickly.

Stage: Control | Level: Beginner | Best for: Giving frontline teams clear steps to follow when something goes wrong after go-live.

Trigger / Condition	Action Required	Who To Contact	Response Time	Escalate To (if unresolved)	Notes
Accuracy drops below 93% for 2 days	Review error log and check scanner	Shift Lead	Same day	Process Owner	Check if retraining needed

TEMPLATE 09 OF 12 · CONTROL

Project Summary One Pager

WHY WE USE IT

A Project Summary One-Pager condenses the whole project — problem, solution, results, owner — onto a single page for leadership and future reference.

BENEFITS

- Communicates the project's value in 60 seconds
- Provides a reusable artefact for benefits reviews and roadmaps
- Forces sharp summarisation — if it doesn't fit on a page, it isn't clear

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Project Summary One Pager

SimplicityHub™ — Project Summary One-Pager

Summarise the entire project on one page — problem, solution, results and next steps — for stakeholders.

Stage: Control │ Level: Beginner │ Best for: Communicating what was done and what was achieved without a lengthy report.

Section	Detail
Problem	Order accuracy was 87%, causing 45 customer complaints per month
Goal	Improve order accuracy to 98% within 3 months
Root Cause	No barcode verification at packing stage; manual checking only
Solution	Introduced barcode scanning at packing and updated work instructions
Results	Accuracy improved to 97.1% in first month; complaints reduced by 62%
Sustained By	Daily check sheet, weekly metric review, updated SOP
Next Steps	Roll out to warehouse B; review again at 90-day mark
Project Lead	J. Smith — completed 01/04/2026

TEMPLATE 10 OF 12 · CONTROL

Results Tracker

WHY WE USE IT

A Results Tracker logs the post-implementation performance of the project's key metrics over time, against the baseline and the target.

BENEFITS

- Proves whether the improvement is being sustained
- Provides the data behind benefits realisation claims
- Triggers a return to the Analyse stage if results regress

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

TEMPLATE

Results Tracker

SimplicityHub™ — Results Tracker

Track the key metrics week by week after the improvement to check whether the change is holding.

Stage: Control │ Level: Beginner │ Best for: Confirming that improvements are sustained and not slipping back to old performance levels.

Week	Date Range	Metric 1 Value	Metric 1 Target	On Track?	Metric 2 Value	Metric 2 Target	On Track?	Notes
Week 1	07/04 – 11/04	96.2%	95%	Yes	1.8 mins	2.0 mins	Yes	Strong start

TEMPLATE 11 OF 12 · CONTROL

STANDARD OPERATING PROCEDURE

WHAT IT IS

A Standard Operating Procedure (SOP) documents the step-by-step process for completing a task or process consistently. It defines the purpose (why the procedure exists), scope (what is included), responsibilities (who does what), required equipment and resources, the ordered steps each with detail, responsible party and expected output, verification criteria (how we know it's being followed correctly), and related documents.

WHY WE USE IT

A Standard Operating Procedure (SOP) documents the new process step by step, with roles, inputs, outputs and exception handling.

BENEFITS

- Eliminates 'how do I do this again?' variation
- Speeds up onboarding for new staff
- Provides the reference point for audits and training

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First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

STANDARD OPERATING PROCEDURE

Step-by-step procedure defining purpose SOP TEMPLATE

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response...	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

SOP DETAILS

SOP Title Structured Complaint Investigation
SOP Number CS-SOP-001
Version 1.0
Effective Date 01 Apr 2026
Review Date 01 Apr 2027
Approved By Sarah Mitchell

PURPOSE

To ensure that all customer...

SCOPE

All Customer Service agents...

RESPONSIBILITIES

CS Agent: Complete the checklist for...

EQUIPMENT AND RESOURCES

CRM system (complaint...

SAFETY / DATA PROTECTION

No physical safety requirements.

PROCEDURE STEPS

Complete one row per step in the...

#	Action / Step	Detail / Instructions	Responsible	Expected Output
1	Acknowledge the complaint	Send acknowledgement to the...	CS Agent	Acknowledgement sent; CRM...
2	Open investigation checklist in CRM	Navigate to the complaint...	CS Agent	Checklist screen open in CRM
3	Gather and document the facts	Record: what happened, when	CS Agent	Facts documented in checklist — fields...
4	Identify the root cause	Determine the root cause of the...	CS Agent	Root cause identified and recorded in...
5	Determine and apply the resolution	Select resolution action from the...	CS Agent / TL	Resolution applied or escalation...
6	Communicate closure to the customer	Use the standard closure...	CS Agent	Closure communication sent; customer...
7	Code the root cause and close...	Select root cause code from...	CS Agent	Case closed in CRM; root cause...
8	Review and escalate if required	If resolution was not possible...	CS Agent / TL	Systemic issues flagged to TL;...

VERIFICATION CRITERIA

Checklist completion rate = 100%...

RELATED DOCUMENTS

CS-SOP-005: Tier-2 Escalation Procedure...

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STANDARD OPERATING PROCEDURE

SOP TEMPLATE

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

SOP DETAILS

SOP Title
SOP Number
Version 1.0
Effective Date

Approved By

PURPOSE

SCOPE

RESPONSIBILITIES

EQUIPMENT AND RESOURCES

SAFETY / DATA PROTECTION

PROCEDURE STEPS

#	Action / Step	Responsible	Expected Output

VERIFICATION CRITERIA

RELATED DOCUMENTS

TEMPLATE 12 OF 12 · CONTROL

SUSTAINABILITY PLAN

WHAT IT IS

A Sustainability Plan defines how each improvement will be kept in place after the project closes. For each improvement, record the control measure (how it is maintained), the named owner, the review frequency, the escalation trigger (the condition under which it is escalated), the last and next review dates, and the current status. Review this plan regularly to confirm improvements are holding and to catch any slippage early.

WHY WE USE IT

A Sustainability Plan defines the ongoing actions, owners and reviews needed to keep the improvement in place over months and years — beyond the formal Control Plan.

BENEFITS

- Names long-term ownership beyond the project team
- Schedules the reviews that prevent slow drift
- Links improvements into the broader operating rhythm of the business

ON THE NEXT PAGES

First, a completed example showing how this template looks when filled in well. Then, a blank version for you to use on your own project.

COMPLETED EXAMPLE

SUSTAINABILITY PLAN

Define how each improvement will be controlled and sustained long-term — with named owners, review frequency and escalation triggers. SUSTAINABILITY PLAN

PROJECT TITLE	PROJECT OWNER	SPONSOR	VERSION	DATE	UPDATED BY
Customer Complaint Response Time Reduction	James Carter	Sarah Mitchell	1.0	01 Apr 2026	James Carter
BUSINESS AREA	Customer Service				

WHAT IS SUSTAINABILITY PLAN?

A Sustainability Plan defines how each improvement will be kept in place after the project closes.

SUSTAINABILITY REGISTER

Complete one row per improvement or control measure

Improvement	Control Measure	Owner	Review Frequency	Escalation Trigger	Last Review	Next Review	Status
Investigation checklist compliance	Mandatory CRM field — case cannot be closed without completion. Weekly compliance report.	CS Team Lead	Weekly	Weekly completion rate drops below 95% — TL coaching + escalate to manager	05 Apr 2026	12 Apr 2026	On Track
Average response time (TTR)	I-MR control chart reviewed weekly by Process Owner. CRM SLA alert triggers at 48 hours.	Process Owner	Weekly	3 consecutive points above UCL — RCA required; escalate to CS manager if unresolved in 1 week	05 Apr 2026	12 Apr 2026	On Track
Root cause coding	CRM mandatory field. Monthly audit sample of 30 cases reviewed by CS Team Lead.	CS Team Lead	Monthly	More than 5% uncoded in monthly audit — agent coaching session required within 5 days	01 Apr 2026	01 May 2026	On Track
CSAT score	Monthly CSAT run chart reviewed by Process Owner. Survey trigger fix deployed by 28 Apr.	Process Owner	Monthly	CSAT drops below 70% for 2 consecutive months — RCA and senior management review	01 Apr 2026	01 May 2026	On Track
Repeat contact rate	Monthly CRM report reviewed by CS Team Lead. Benchmarked against 30% target.	CS Team Lead	Monthly	Repeat contact rate exceeds 35% for 2 consecutive months — process review required	01 Apr 2026	01 May 2026	On Track
Agent refresher training	Annual training schedule maintained by L&D. Training records in HR system.	L&D Lead	Annual	Agent tenure >12 months since last training — schedule refresher within 4 weeks	21 Apr 2026	21 Apr 2027	On Track
CRM SLA alert and dashboard uptime	IT quarterly health check. Alert monitored daily — failure logged in IT incident system.	IT Lead	Quarterly	Dashboard or alert unavailable for >2 business days — IT escalation ticket raised	07 Apr 2026	01 Jul 2026	On Track

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SUSTAINABILITY PLAN

SUSTAINABILITY PLAN

PROJECT TITLE	PROJECT	SPONSOR	VERSION	DATE	UPDATED BY
			1.0		

BUSINESS AREA

SUSTAINABILITY REGISTER

Improvement	Control Measure	Owner	Escalation Trigger	Last Review	Next Review	Status

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