

Initiative Plan Worksheet

Initiative Manager	Team Members	Date
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Initiative Name/Topic	
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Current State What is the purpose or reason for the initiative? What is the problem or issue that needs to be solved? Include data as available.

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List of Symptoms Evidence or indication of a problem that will be addressed in this initiative.

1.	
2.	
3.	
4.	
5.	
6.	

To what do you attribute the root cause? Based on the symptoms listed above, conduct a root cause analysis.

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Desired State What quantifiable measurements will indicate successful implementation of the plan? Desired state should be the solution(s) to the current state.

1.	
2.	
3.	
4.	
5.	
6.	

A. Resources Required What are the physical and human resources needed for the initiative? Include labor hours and equipment.

1.	
2.	
3.	
4.	
5.	
6.	

B. Initiative Time Line What actions need to take place?	C. Plan Execution
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Important: Include a task to monitor initiative success (recommended within six months of initiative implementation)

	Action/Task (include leader)	Start Date	Measurement	Status (R/Y/G)	Percent Complete	Forecast Due Date
1.						
2.						
3.						
4.						
5.						
6.						

CHECK	D. Confirm Success Was the desired state achieved? Confirm how.		
		Performance Measure	Observation
	1.		
	2.		
	3.		
4.			

Plan Approved by (type name):

Date:

ACT	E. Adjustments needed for successful completion What is required to ensure the desired outcome is achieved? Go back to section B to include any additional tasks required for successful completion.

Summary of initiative completion including performance results (from section D).

INSTRUCTIONS

Action plan How will the objective be accomplished? Use the Plan-Do-Check-Act process approach. The desired outcome will be accomplished by carrying out the following:

A. Define initiative resource requirements	}	Plan (Approach*)
B. Establish initiative time line		
C. Execute plan	}	Do (Deployment*)
D. Monitor plan to actual achievements	}	Check (Learning*)
E. Adjust activities to fulfill plan objectives	}	Act (Integration*)

What is the status of the task? Status relates to the original plan date, or baseline. G = On Track, Y=At Risk, R=Missed or Will Miss. Type the appropriate letter (G=Green, Y=Yellow, R=Red) and shade the table cell with Green, Yellow or Red color. *Baldrige Criteria Terminology

Hard copies of this procedure are for reference only. Please use electronic document to ensure the most current version. For more information, please contact Jim Kastama & Associates LLC at www.jkastama.com.