PLANNING AND OPERATIONS

Process Improvement Agenda

[Process name]

MEETING DATE
[Month day, year]

LENGTH
60 minutes

Time	[00:00] to [00:00]	**Location**	[Room or video link]
Process owner	[Name]	**Facilitator**	[Name]
Attendees	[Names]		

Objective

Find the biggest bottleneck in [process], choose one change to test, and agree how we'll know it worked.

Change one thing at a time. If you change three, you won't know which one helped.

Before the meeting

- Process owner: bring the current numbers (time taken, error rate, volume).
- Invite at least one person who does the work every day.
- Everyone: note the step that frustrates you most, with a real example.

Agenda (60 minutes)

NO.	MIN	ITEM	LEAD	PURPOSE
1	**15**	**Map the current process** Step by step, as it really runs, not as documented.	[Process owner]	Discuss
2	**15**	**Find the bottlenecks** Where work waits, gets redone, or goes wrong.	All	Discuss
3	**15**	**Choose one improvement** Biggest effect for the least effort.	[Process owner]	**Decide**
4	**10**	**Decide how to measure it** The number now, the target, and when to check.	[Facilitator]	**Decide**
5	**5**	**Owner and trial dates** Who runs the trial and when it ends.	[Notetaker]	**Decide**

Current process

STEP	WHO	TIME TAKEN	PROBLEM SEEN
1. [Step]	[Role]	[0 hours]	[Waiting, rework, errors]
2. [Step]	[Role]	[0 hours]	[Waiting, rework, errors]
3. [Step]	[Role]	[0 hours]	[Waiting, rework, errors]
4. [Step]	[Role]	[0 hours]	[Waiting, rework, errors]

MEETING RECORD

Process Improvement Agenda

NOTETAKER
[Name]

Current numbers

MEASURE	NOW	TARGET	SOURCE
[Time from start to finish]	[0 days]	[0 days]	[Where the number comes from]
[Error or rework rate]	[0%]	[0%]	[Where the number comes from]

Improvement to test

FIELD	RECORD
Change	[What we'll do differently]
Measure	[Number now] to [target] for [metric]
Trial	[Start date] to [end date], run by [name]
Check on	[Date], at [meeting]
If it works	[Who updates the process documents]

Decisions, actions and parking lot

TYPE	WHAT WAS AGREED	OWNER	DUE
Decision	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Parked	[Topic, and where it goes next: meeting, email, next agenda]	[Name]	[Date]

Notes

[Anything else worth keeping: numbers quoted, open questions, who to follow up with]