***Process Assessment Worksheet***

*“A worksheet to assess a given process to form the basis for improvement of that process”*

|  |  |
| --- | --- |
|  **Process Title**:  |  |
| Organization Name:  |  |
| Functional Area:  |  |
| Preparer:  |  |
| Preparer Contact Info:  |  |
| Date:  |  |
|  |  |
|  |  |

***Instructions****: Identify a team to review a subject process. As a team, read each question, pick the closest true response(s), add any desired comments, define any improvement actions. Work toward consensus and where that is not possible, capture any differences of opinion. When appropriate, have other stakeholders review the completed worksheet and make comments or approvals. Use the resulting worksheet contents to develop specific improvement actions with accountabilities and due dates.*

|  |  |
| --- | --- |
|  |  |
| **Assessment Questions** | Comments or Specific Change Needed or Question to be Answered |
|  |  |
| **Work Repeatability – Process Feasibility** |  |
| Make notes on the fact (or lack thereof) that the area of work being considered is sufficiently repeatable so that a process is feasible at this time. |  |
| **The Organization Environment – Process Acceptance** |  |
| Make notes on the organization environment that will or will not allow a new process or a modified process to be implemented. |  |
| **Process Status** |  |
| Make notes on the status of the current process as to satisfactory, needing minor or major improvements. |  |
| **Process Documentation, Training and Support** |  |
| Make notes on the sufficiency of documentation, training and support for the respective process. |  |
| **Process Tools and Systems** |  |
| Make notes on the adequacy of currently implemented tools (checklists, templates, etc.) and any systems (financial, etc.) to make this process function in an acceptable manner. |  |
| **Process Roles** |  |
| Make notes on the status and adequacy of currently defined roles for completing this process. |  |
| **Current Skills** |  |
| Make notes on the availability of skills needed to perform this process. |  |
| **Process Step Handoffs** |  |
| Make notes as to the adequacy of definition of what physical or information transfers happen from one process step to the next. |  |
| **Process Enhancement Goals** |  |
| With the assumption that this process is working as defined but we want it to work better, make notes on what end results or conditions are desired from a process improvement in terms of speed, costs, quality and other pertinent process measures. |  |
| **Process Deficiency** |  |
| With the assumption that this process is NOT working as defined and we want to fix it, make notes on what end results or conditions are desired from a process repair in terms of speed, costs, quality and other pertinent process measures. |  |
| **<< Your Added Categories >>** |  |
| xx |  |
| **<< Your Added Categories >>** |  |
| xx |  |
| **<< Your Added Categories >>** |  |
| xx |  |

|  |
| --- |
| **Additional Comments / Recommendations / Actions Needed**1. xx
2. xx
3. xx
 |