*Context (background for others to understand the Problem or Opportunity)*

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| *Company, Customer, Product Line, Location, Department, etc*. |

*Situation Summary Statement (what is the perceived Problem or Opportunity)*

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| ***When***  *When did the Situation start, or when should it start (Date, Event, etc.)* | ***Process/Action***  *What action is occurring/occurred/should occur (think in terms of ‘verbs’)* | ***Output/Impact***  *What is/was/will be the impact of the action (think in terms of ‘nouns’)* | ***Who***  *What parties are/was/will be affected (customers, internal, vendors, etc.)* |

*Quantitative Measurements (how do we know this is a Problem or Opportunity)*

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| ***Quantifiable Metric***  *Describe the Quantifiable Metric that you want to affect (cost per unit, accuracy rate, hourly output, etc.)*  *It is best if you can have one Metric, but maybe two are required* | ***Quantifiable Value - Today***  *What is the Quantifiable Value of that metric right now? (.10/unit, 99.2% accuracy, 2000 units/hr)*  *What is the source of this data?* | ***Desired Value - Future***  *What is the Future Desired Value of this Metric? (.5/unit, 99.9% accuracy, 3000 units/hr)*  *How did you determine this was the desired value?* | ***Quantified Impact***  *Calculate a business-level impact, like dollars earned or dollars saved.*  *(saving .05/unit @ 100,000 units per day will save $5,000 per day)* |

*Solution Parameters (what are the boundaries around a possible solution)*

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| ***Must-Have Critical to Quality (CTQ)***  *(eg, Manufacturing Quality must not decline, Fill Rates are not effected, Safety is maintained)* | ***People Constraints***  *(eg, IT can only give us a day per week to develop and implement)* | ***Timing Constraints***  *(eg, the solution can not start implementation until Jan of next year and should be operational by May)* | ***Budget Constraints***  *(eg, solution must pay for itself in the same fiscal year)* |

*Solution Stakeholders (who needs to be involved in developing a solution) Other**Measurements (other aspects of the Situation)*

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| ***Department: Person’s Name***  *Operations: Megan Manager*  *HR: Henry Helpful*  *Finance: Bill Counter*  *Maintenance: Willy Wrench*  *Purchasing: Paul Order* | ***P/A/B***  *Participates*  *Approves*  *Both* | ***Quantitative Measures***  *Those that may be part of the Situation and can be quantified (safety rates, employee turnover, energy consumption)* | ***Qualitative Measures***  *Those that may be part of the Situation and need to be considered (employee morale, customer responsiveness, market perception)* |