SALES PDCA A3

Team Name:

Sales Cycle ID:

S: Select the initial Problem Perception

What is the problem to be solved? Describe the problem, issue or need that your project is intended to address.

A: Analyze the current process

Review the Critical to Quality (CTQ) issues facing this value stream and how they apply to this cycle. What should be involved in this step? Have customers' expectations and specifications been examined and documented? What are the points of concern?

L: Locate the people who understand the process

List the members of your team, including position and role they will play.

Name	Position	Role

E: Empower the Team

The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team (Team Charter) to accomplish process.

S: Select the Improvement

The team must fully understand not only the CTQ's of the overall Value Stream but the CTQ's of this particular cycle. Define the Gap that is to be completed in this cycle.

P: Plan

What are the detailed steps you will take to make an improvement?
Clarify the problem, breaking down customer decision process and people involve.
Locate the point of concern or cause through Who, What, Where, When
Identify root cause and verify with data.
Develop countermeasures utilizing user stories and place on Kanban board, prioritize.

D: Do the plan

Build Project Plan or iteration through user stories. Use a Kanban board to visualize work flow and who is doing what. Pull tasks into doing as needed. Use daily stand-ups or Andon to signify problems or hang-ups.

C: Check (Study) to see if an improvement was made

Did the plan work? Collect and analyze data to demonstrate if gap was closed or not. Determine which changes worked and which did not.

A: Act (Adjust)

Has Gap been closed? Have Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer be handed off to next stage? Document the steps that will need to be taken for this and complete hand off.