

Managing to Learn — Detailed A3 Template

Title: What change or improvement are you talking about?		Owner/Date <table border="1"> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>								
1. Background: What are you talking about and why? <p>What is the purpose, the business reason for choosing this issue? What specific performance measure needs to be improved? What is the strategic, operational, historical, or organizational context of the situation?</p>		5. Recommendations: What do you propose and why? <p>What are the options for addressing the gaps and improving performance in the current situation? → Always start with two or three alternatives to evaluate. How do they compare in effectiveness, feasibility, and potential disruption? What are their relative costs and benefits? Which do you recommend and why? → Show how your proposed actions will address the specific causes of the gaps or constraints you identified in your analysis. The link should be clear and explicit!</p>								
2. Current Conditions: Where do things stand now? <p>What is the problem or need—the gap in performance? What is happening now versus what you want or needs to be happening? Have you been to the gemba? What facts or data indicate there is a problem? What specific conditions indicate that you have a problem or need? Where and how much? Can you break the problem into smaller pieces? → Show facts and processes visually using charts, graphs, maps, etc.</p>		6. Plan: How will you implement? (4Ws, 1H) <p>What will be the main actions and outcomes in the implementation process and in what sequence? What support and resources will be required? Who will be responsible for what, when, and how much? How will you measure effectiveness? When will progress be reviewed and by whom? → Use a Gantt chart (or similar diagram) to display actions, steps, outcomes, timelines, and roles.</p>								
3. Goal: What specific outcome is required? <p>What specific improvement(s) in performance do you need to achieve? → Show visually how much, by when, and with what impact. → Don't state a countermeasure as a goal!</p>		7. Followup: How will you ensure ongoing PDCA? <p>How and when will you know if plans have been followed and the actions have had the impact planned and needed? How will you know if you meet your targets? How will you know if you reduced the gap in performance? What related issues or unintended consequences do you anticipate? What contingencies can you anticipate? What processes will you use to enable, assure, and sustain success? How will you share your learnings with other areas?</p>								
4. Analysis: Why does the problem or need exist? <p>What do the specifics of the issues in work processes (location, patterns, trends, factors) indicate about why the performance gap or need exists? What conditions or occurrences are preventing you from achieving the goals? Why do they exist? What is (are) their cause(s)? → Use the simplest problem-analysis tool that will suffice to show cause-and-effect down to root cause. From 5 Whys to 7 QC tools (fishbones, analysis trees, Pareto charts) to more sophisticated SPC, 6 Sigma, and other tools as needed. → Test the cause-and-effect logic by asking "why?" downward and stating "therefore" upward.</p>										