Process Improvement Plan

Document the current process, identify friction, and design a practical future state.

CLIENT / ORGANIZATION: _____ **PREPARED BY: Trey Germano / Ground to Oak**

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1. Process Definition

Process name	Name the process being reviewed. _____
Process owner	Who is accountable for the process. _____
Customer / user	Who relies on the process and what they need. _____
Trigger and endpoint	What starts the process and what marks completion. _____
Review boundary	Teams, locations, systems, and period included. _____

2. Current-State Map

Step	Role / system	Input → activity → output	Pain point / wait
[Document current state]	[Document current state]	[Document current state]	[Document current state]
[Document current state]	[Document current state]	[Document current state]	[Document current state]
[Document current state]	[Document current state]	[Document current state]	[Document current state]
[Document current state]	[Document current state]	[Document current state]	[Document current state]
[Document current state]	[Document current state]	[Document current state]	[Document current state]
[Document current state]	[Document current state]	[Document current state]	[Document current state]
[Document current state]	[Document current state]	[Document current state]	[Document current state]

3. Evidence & Root-Cause Analysis

Observed issues	Describe specific errors, delays, rework, handoffs, or confusion. _____
Baseline measures	Cycle time, volume, error rate, cost, satisfaction, or other available data. _____

Likely root causes	Separate evidence from hypotheses; use 5 Whys or another method if useful. _____
Constraints	Policy, technology, compliance, staffing, or budget limitations. _____

4. Future-State Recommendations

Change	Expected benefit	Effort / risk	Owner
[Recommendation]	[Recommendation]	[Recommendation]	[Recommendation]
[Recommendation]	[Recommendation]	[Recommendation]	[Recommendation]
[Recommendation]	[Recommendation]	[Recommendation]	[Recommendation]
[Recommendation]	[Recommendation]	[Recommendation]	[Recommendation]
[Recommendation]	[Recommendation]	[Recommendation]	[Recommendation]

5. Implementation & Controls

Pilot / rollout plan	How changes will be tested and introduced. _____
SOP / training needs	Documentation, communication, and training required. _____
Controls	Quality checks, approvals, and exception handling. _____
Performance review	Measure, target, data source, owner, and review frequency. _____
Risks & open questions	What must be resolved before implementation. _____