



CPI Event / Project Tollgate Template



- Template is to provide a starting point for new CPI practitioners.
 - Final Out Briefs should include all DMAIC phases.
 - Use background / format according to your command's standards.
- Tollgates / Out Briefs will be viewed by others outside your command.
 - Tell the whole story to ensure those unfamiliar with your event / project can easily understand.
- Keep presentations within reasonable time frame.
 - Recommend no more than 1 hour for final brief.
 - Allow time for questions.



[Phase] Tollgate/Final Brief Template



[Enter Command (ex. MCINCR-MCBQ P&I)]

[Project Name]

[Briefing Date]



Agenda



- Overview
- Define Phase
 - Charter
 - Other Tools/Topics
- Measure Phase
 - Data/VOC
 - Current State Map
 - Other Tools/Topics
- Required Items
- Analyze Phase
 - Data Analysis
 - Root Cause Analysis
 - Findings
 - Other Tools/Topics
- Improve Phase
 - List of Improvements
 - Future State Map
 - Improvement Data
 - Other Tools/Topics
- Control Phase
 - Control Plan
 - Follow on actions



Overview



- Use this section to discuss the following:
 - Background – review initial reason(s) behind problem
 - Task – review initial tasking
 - Business Impact – describe impact if problem is not remedied
 - Team Members – identify team members and roles
 - Terms & Definitions – identify uncommon terms



Define Phase – [Tool/Topic]



- Include significant tools used, such as:
 - **Charter**
 - SIPOC – list out suppliers, inputs, process, outputs and customers.
 - Communication Plan – identify key stakeholders and how project status is conveyed.
 - Voice of the Customer – review how customers view the process.
 - Etc.
- Most Define tools can be shown in bullet or tabular form.



Define Phase - Charter



- Include Major Aspects of Charter
 - Problem Statement – what is the problem?
 - Goal Statement – how will the process operate after the event / project?
 - Scope Statements (In & Out) – what was and wasn't addressed in the event / project?
 - Timeline & Milestones - review objectives, actions and milestones.
- Charter items can be displayed in multiple ways
 - Bullet Style
 - Quad Chart
 - PDF Version of Signed Charter



Measure Phase – [Tool/Topic]



- Include significant tools used, such as:
 - **Current State Map**
 - Data Collection Plan
 - Statistical Sampling Plan
 - Measurement System Analysis (MSA)
 - Spaghetti / Circle Diagrams
 - Value Analysis (can be included in value stream map)
 - Photos showing area before improvements
 - Etc.



Measure Phase – Current State Map



- **Current state maps** can be displayed in multiple ways:
 - Map created during event/project (paper / sticky notes)
 - Map created using software:
 - Excel
 - iGrafx
 - Visio
 - May include value analysis
- Ensure maps are legible
 - Large maps difficult to read
 - May require separate handout



Analyze Phase – [Tool/Topic]



- Include significant tools used, such as:
 - **Root Cause Analysis**
 - Fishbone Diagram
 - 5 Whys
 - Histograms / Pareto Charts
 - Failure Modes and Effects Analysis
 - Statistical Analysis
 - ANOVA, Regression, Hypothesis Tests
 - Process Capability
 - Statistical Process Control / Control Charts
 - Etc.



Analyze Phase – Tips



- Analyze Phase tips:
 - Simple slides are the best
 - Use common statistical terminology.
 - Don't put too much info on one slide.
 - One chart per slide.
 - Use limited wording on slide to allow for large charts.
 - Uncommon / complex charts will require additional explanation.
 - May have to review purpose of tool prior to addressing in presentation.



Improve Phase – [Tool/Topic]



- Include significant tools used, such as:
 - List of Improvements
 - Future State Map
 - 5S
 - Pull System / Kanban
 - Mistake Proofing
 - Streamlined forms
 - Analytical Batch Sizing
 - Total Productive Maintenance
 - Design of Experiments (DOE)
 - Piloting
 - Etc.



Improve Phase - Tips



- Use visuals if audience is unfamiliar with process / work place.
- Most improvements aided by pictures
 - 5S: before and after
 - Pull System / Kanban: illustrate process
 - Shop / Office Layout: before and after
 - Mistake Proofing ideas
- Provide templates / examples for other improvements
 - Streamlined forms (printout if electronic)
 - Kanban Cards
 - Current and Future State Maps (comparison)



Control Phase – [Tool/Topic]



- Include significant tools used, such as:
 - **Control Plan**
 - Standard Work Instructions / Standard Operating Procedures
 - Control Charts
 - Statistical Process Controls
 - Replication
 - Feedback / Lessons Learned
 - Etc.



Control Phase – Tips



- Control Phase topics should include:
 - How will improvements be maintained
 - Who is responsible to maintain improvements
 - Supervisor / Entire Office
 - Creation, maintenance and retrieval of:
 - Work instructions
 - Control charts
 - Metrics
 - Feedback on CPI / DMAIC process
 - Overall satisfaction with event / project



Additional Items – Project Benefits



- Review benefits of event / project
 - Return on Investment
 - Before and after metrics
 - Just-do-its
 - Reductions in:
 - Space used
 - Time spent
 - Resources allocated
 - Funds spent
 - Items repurposed
- Identification of additional opportunities



QUESTIONS?