

# OPERATIONAL EXCELLENCE IMPLEMENTATION PLAN TEMPLATE

ORGANIZATION / DEPARTMENT NAME	LAST UPDATED BY	DATE OF LAST UPDATE

ACTION	PARTY RESPONSIBLE	PRIORITY	STATUS	START DATE	END DATE	NOTES
Phase 1: ORGANIZE		High	In Progress			
Recruit team members		High	Complete			
Assign Roles		High	Overdue			
Define Mission and Vision		High	Not Started			
Phase 2: ASSESS AND DOCUMENT		Medium	In Progress			
Identify most important processes		High	In Progress			
Meet with frontline team to get input		Medium	On Hold			
Learn the process		Low	Not Started			
Document current state using metrics		Low	Not Started			
Phase 3: IDENTIFY IMPROVEMENTS						
Articulate process improvement initiatives						
Outline culture changes needed to support						
Document project steps						
Create timeline						
Assign roles and responsibilities						
Phase 4: SET GOALS						
Define most important KPIs						
Establish SMART goals						
Assign tracking and monitoring responsibilities						
Phase 5: EXECUTE						
Communicate plans to management						
Communicate plans to all staff						
Culture building exercises						
Identify needed resources						
Implement steps outlined in Phase 3						
Phase 6: EVALUATE IMPACT						
Document improvements						
Get feedback from frontline staff on successes and failures						
Track performance vs goal						
Report to management and organization on progress						
Phase 7: CONSOLIDATE						
Review operational excellence framework to see if changes needed						
Create plan to continue learning and improvements						
Steps to continue to build culture						
Determine next operational excellence initiative						