


ets Process Documentation Method (PDM) Steps and Checkpoints – A Systematic Approach for Documenting an Existing Process

Steps	PDM Checkpoints	
1. Select Process	1. Key work processes were identified and prioritized according to stakeholder impact and need for improvement.	PLAN
	2. Top priority process was selected.	
	3. Process champion was identified.	
	4. Process objective was stated.	
2. Identify Indicators	5. Customers and participants were identified.	
	6. Customer needs and requirements were identified and prioritized.(e.g. SIPOC Analysis)	
	7. Quality outcome and in-process indicators were assigned, and considered (Quality, Cost, Delivery, Timeliness, Safety, Security, and Environment). <ul style="list-style-type: none"> a. Quality indicators represent Customer requirements. b. Process input and output requirements are evaluated for integration. 	
	8. In-process indicators were linked to quality outcome indicators.	
	9. Standards, targets or limits were established for indicators.	
	10. Method of obtaining data was established (survey, focus group, other customer information).	
3. Construct Process Flow Chart	11. Process flow was shown.	
	12. Process steps / time frames were identified.	
	13. Process flow was reviewed for efficiency. (e.g. Best Path) <ul style="list-style-type: none"> a. Define the best path to the desired outcomes. b. Create bridges to reduce time and waste. c. Determine the innovations, technology, and training required to build the bridges. 	
	14. Quality and process indicators were noted on flow chart.	
	15. Contingency plans to ensure control were noted (if necessary).	
	16. Control system was reviewed with supervisor / manager.	
4. Implement Process Control System	17. The Process Control System was finalized: <ul style="list-style-type: none"> a. Develop a procedure for managing the process control system. b. Develop checksheets to facilitate data collection and analysis. c. Train employees to: a) monitor; b) evaluate; c) improve; d) document learning; e) apply contingencies. d. Commence data collection and monitor indicators. e. Review initial results and adjust data collection or process as needed. 	DO
5. Monitor Process Control System	18. Process was evaluated for stability (e.g. six interpretation approaches).	CHECK
	19. Process was evaluated for capability (e.g. histograms).	
6. Improve Process	20. Systematic improvement techniques were used, e.g.: <ul style="list-style-type: none"> a. ets DMAIC method / Lean tools b. Statistical Tools and Techniques c. Qualitative Analysis 	ACT
	21. An action plan was established to get back into control or improve the process.	
7. Standardize Process	22. Method was established to ensure process standards continuously reflect customer requirements. (e.g. Procedures and training)	
	23. Specific areas for replication were considered.	
	24. Applied P-D-C-A to lessons learned.	