

Insert Logo Here	Process Summary Template <i>(with Guidance)</i>
<p>PROCESS PURPOSE AND PRODUCTS</p> <p><i>Why is it important that this process exists?</i></p>	<ul style="list-style-type: none"> • <i>Describe the process in your own words, one or two sentences.</i>
<p>CUSTOMERS AND REQUIREMENTS</p> <p><i>The names of the people who receive the products/services of the process and their requirements.</i></p>	<ul style="list-style-type: none"> • <i>Typical customers include people like clients, volunteers, staff, board. Talk to them and ask what they need.</i>
<p>PROCESS STEPS</p> <p><i>Outline timing and involved people of key steps.</i></p>	<ul style="list-style-type: none"> • <i>List the steps in a simple way. If necessary, create a flowchart or model or use a separate page to document the steps. You can add PACE info here too if desired.</i>
<p>TOOLS/TEMPLATES</p> <p><i>Tools used to execute the process.</i></p>	<ul style="list-style-type: none"> • <i>Tools are structure that help you manage the work. It can be as simple as a standard agenda.</i>
<p>MEASURES</p> <p><i>What measures are used to know if the process is performing and that customer requirements are being met?</i></p>	<ul style="list-style-type: none"> • <i>Identify 1-3 metrics including outcome and process metrics. Commit to tracking one. Keep it simple.</i>
<p>ASSESSMENT OF SYSTEM PERFORMANCE</p> <p><i>How is the process performing?</i></p>	<ul style="list-style-type: none"> • <i>Use a color, e.g. green, yellow or red. Then describe the system performance in a sentence.</i>
<p>IMPROVEMENT PLAN</p> <p><i>What is the plan to improve the effectiveness of the process?</i></p>	<ul style="list-style-type: none"> • <i>Capture improvement ideas here as you develop this page. If facilitated, some new ideas will almost definitely emerge.</i>