

“Define” Tollgate Review and Deliverables...

Define Tollgate Review:

1. Has the Project Team has been developed? _____ (Yes or No)
 - Is the team and project sponsored by a champion or business leader? Yes / No
 - Who is the Champion? _____
 - Is the team comprised of SME's? _____ (Yes or No)
 - Who are the SME's

 - Have they had the Yellow Belt Training? _____ (Yes or No)
2. Has the “Project Charter” been developed? _____ (Yes or No)
(The following questions should help determine the answer?)
 - Business Case:
 - What are the compelling business reasons for embarking on this project?

 - Is the project linked to key business goals and objectives? _____ (Yes or No)
 - What key business process output measure(s) will the project leverage and how?

 - What are the rough order estimates on cost savings/opportunities on this project?

 - Problem Statement (Starting Line):
 - What specifically is the problem?

 - Where does it occur?

“Define” Tollgate Review and Deliverables...

- When does it occur?

- What is its extent?

- Goal Statement (Finish Line):

- What is the goal or target for the improvement team's project?

- Do the problem and goal statements meet the SMART criteria (specific, measurable, attainable, relevant, and time-bound)? _____ (Yes or No)
 - Has anyone else (internal or external to the organization) attempted to solve this problem or a similar one before? _____ (Yes or No)
 - If so, what knowledge can be leveraged from these previous efforts?

- How will the project team and the organization measure complete success for this project?

- Project Scope:

- What are the physical boundaries of the scope?

- What is in bounds and what is not?

“Define” Tollgate Review and Deliverables...

- How does the project manager ensure against scope creep?

- Is the project scope manageable? _____ (Yes or No)
 - What constraints exist that might impact the team?

- Milestones:

- When was the project start date? _____
- When is the estimated completion date? _____
- Is the project currently on schedule according to the plan? _____ (Yes or No)
 - If No, Why?

- Has a project plan with milestones been developed? _____ (Yes or No)
- Is there a critical path (due dates to each phase of the DMAIC) to complete the project? _____ (Yes or No)
- How will variation in the actual durations of each activity be dealt with to ensure that the expected project completion date is met?

3. Do we understand the Customers' Requirements? _____ (Yes or No)

- Have the customers been identified? _____ (Yes or No)
 - Who are the customers:

- Has the improvement team collected the 'voice of the customer' (obtained feedback - qualitative and quantitative)? _____ (Yes or No)
- What customer feedback methods were used to solicit their input?

- Have the customer needs been translated into specific, measurable requirements? _____ (Yes or No)

“Define” Tollgate Review and Deliverables...

4. Has a SIPOC diagram been produced describing the Suppliers, Inputs, Process, Outputs, and Customers? _____ (Yes or No)
5. Have you used a Lean tool like the Value Stream Map to Identify Waste in the Process and to help in the Project Scoping process? _____ (Yes or No)

Define Stage Deliverables:

- Project Team has been developed and is sponsored by a champion or business leader.
- Project management charter, including business case, problem and goal statements, project scope, milestones, roles and responsibilities, communication plan.
- Completed SIPOC representation, describing the Suppliers, Inputs, Process, Outputs, and Customers.
- Completed Value Stream Map to show "present state" of Waste in the process and to further scope (If applicable)
- Red flags and recommendations for resolving them defined
- Next steps documented
- Approval of report out signed by Project Champion

Project Champion Approval:

Project Champions Name

Project Champions Signature