

Checksheet Development Instructions

Purpose: Use in data collection to categorize and measure/track frequency of processes, problems, causes, or other performance factors. Serves as “starting point” for Pareto charts and other graphical display tools.

Tools: Graph Paper, Pen/Pencil, Excel, Word or other

Who: Process Owner, Practitioner, Team

Inputs: Sampling Definitions and Sampling Worksheets

Instructions:

1. Determine data to be gathered
 - a. Types of problems in the process
 - b. Possible causes of one or more problems
 - c. Satisfaction of customer requirements
 - d. Other process measures
2. Decide on frequency (hour, shift, day, week, month, etc.) from Sampling Worksheets
3. Design the checklist(s) matrix of form for your team
 - a. One axis for categories and the other for frequency
 - b. Use complete dates (e.g. 10/10/02 or week of 10/10/02)
 - c. Include space for data collectors' full name
 - d. Include space for stratification factors
4. Ensure effectiveness (train the users)
5. Collect the data
6. Compile the results
7. Chart and analyze data as needed

Examples of data checksheets and collection forms:

- Checksheets
- Frequency Plots
- Confirmation Checksheets
- Concentration Diagrams