

TOOLS AND TECHNIQUES CHECKLIST

A -- Attended to (yes, OK, answer(s) known, done, etc.)

N -- Not attended to (not applicable, not needed, little or no risk, etc.)

A N FACILITIES

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Do we have a PC and printer available? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Do we have Charting Software available? |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Do we have adequate workspace and tools for preparing charts, etc.? |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Do we have adequate space to display and work with our charts? |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Do we have the forms we need? |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Do we have proper binders, file folders, dividers, etc.? |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Do people know who is to take care of what and when, where and how to do it? |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Do we have a numbering system? |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. Do we have a labeling system? |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. Do we have proper storage space? |

TRAINING

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 11. Do we know which techniques we intend to use? |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. Do we have experience or access to experience with the chosen techniques? |

TECHNIQUES

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 13. Process Charts – To analyze and improve a process in detail. |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. Overview Charts – To provide a process overview. |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Flow Diagram – To analyze routing, backtracking, etc. |
| <input type="checkbox"/> | <input type="checkbox"/> | 16. Time Line – To analyze processing time. |
| <input type="checkbox"/> | <input type="checkbox"/> | 17. Work Distribution Charts – To analyze the use of time by a group of people working together in a unit. |
| <input type="checkbox"/> | <input type="checkbox"/> | 18. Recurring Data Test – To determine if forms, formats, records, etc. should be combined. |
| <input type="checkbox"/> | <input type="checkbox"/> | 19. Forms Analysis Test – to interview users of a form and streamline it. |
| <input type="checkbox"/> | <input type="checkbox"/> | 20. Entries Test – To interview users about the entries on a form. |
| <input type="checkbox"/> | <input type="checkbox"/> | 21. Handwriting Test – To design a productive form for handwriting. |
| <input type="checkbox"/> | <input type="checkbox"/> | 22. Typewriting Test – To design a productive form for typewriting. This test can be adapted to any form of keyboard entry. |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. Operation Chart – To analyze activities at a work place. |
| <input type="checkbox"/> | <input type="checkbox"/> | 24. Work Place Layout – To analyze a work place design. |
| <input type="checkbox"/> | <input type="checkbox"/> | 25. Operator Machine Chart – To analyze the timing of an operator or operators and a machine or machines. |
| <input type="checkbox"/> | <input type="checkbox"/> | 26. Project Record Form – To keep track of a team's ideas and assignments. |
| <input type="checkbox"/> | <input type="checkbox"/> | 27. Benefit and Cost Work Sheets – To determine benefits and costs of recommendations. |
| <input type="checkbox"/> | <input type="checkbox"/> | 28. Activities Checklist – To determine activities required to install recommended changes. |
| <input type="checkbox"/> | <input type="checkbox"/> | 29. Activity List – To assign installation activities. |
| <input type="checkbox"/> | <input type="checkbox"/> | 30. Gantt Charts – To schedule a project. |
| <input type="checkbox"/> | <input type="checkbox"/> | 31. Network Chart – To schedule the activities of a complex installation. |
| <input type="checkbox"/> | <input type="checkbox"/> | 32. Responsibility Charts – To determine, in detail, how the operating people are to work together to accomplish the process. |
| <input type="checkbox"/> | <input type="checkbox"/> | 33. Playscript – To document the process in narrative form, consistent with the process chart. |
| <input type="checkbox"/> | <input type="checkbox"/> | 34. Annotated Forms – To show how to fill out forms. |

For understanding business processes: Graham Process Mapping Software at www.processchart.com

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