The printable *CI toolkit.*

Blank, fill-in versions of every continuous-improvement tool in the method, grouped by Plan, Do, Check and Act. Print it, grab a pencil, and fill one in over coffee. Pencil beats perfect. Many of the tools here come from DMAIC (Six Sigma's Define, Measure, Analyze, Improve, Control), and we're grateful for them.

P PLAN

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24 tools, each on its own page. Filled-in examples live in the method.

1 Personal *SIPOC*

• CI tool · SIPOC P · Plan

A living map of your life's work, like a will or a living trust: where the work comes from, what it is, how you handle it, what good looks like, and who it's for. Fill left to right in about twenty minutes, then review it on a set schedule (we suggest quarterly) and update it as life changes.

Reviewed on: _____ Next review (quarterly?): _____

S · Suppliers roles, channels, plans	**I · Inputs** what actually shows up	**P · Process** five steps or fewer	**O · Outputs** what "good" looks like	**C · Customers** who it serves
		Capture → Triage → Decide → Do → File & improve		

Quality · the CTQ

how we expect the thing to be done, built in at the source

_____

_____

_____

Delivery

when it has to arrive, and how often

_____

_____

_____

Quality and delivery measures become the requirements that drive our notifications and the daily newspaper, which feeds the kanban and the daily report-out. Check: does every output serve a named customer? If not, drop it or park it.

2 Stakeholder *analysis*

• CI tool · Stakeholder analysis

P · Plan

Once you know your customers, map what each one needs from you. Start with the C column of your SIPOC. Ideas: family, spouse, work team, close friends, guests, and yourself.

Who	What they need from me	How often	How I keep them in the loop
Myself			

3 Voice of the Customer → *CTQ tree*

• CI tool · VOC → CTQ tree

P · Plan

Listen first: for each customer from your SIPOC, write what they would actually say (their words, feedback, what you notice) and the need underneath. Then write the CTQ, critical to quality: a plain, checkable standard for “good” that also goes into the SIPOC's quality column.

Who	**What they'd say** their words	**What they really need**	**CTQ** how I'll know it's good	**Target**
Myself				

A good CTQ is something you could check on a calendar or a count. “Be more present” → “dinners without screens, most nights.”

4 Macro plan *(Hoshin kanri)*

• CI tool · Macro plan (Hoshin kanri)

P · Plan

Every small thing points up (hoshin kanri). Write top to bottom; each level should name the one above it serves.

Future self · 3+ years

Vision · mission · values

Vision: an ordinary Tuesday, three years out. Mission: this season, one line. Values: three to five filters.

↓

Macro plan · this year

Three or four themes (big rocks)

↓

90-day plan · this quarter

A few rocks

Rock	Serves theme	Done when

↓

This week · one page

Blocks that move a rock

Plus: what's waiting on you, and the day you keep free.

5 Baseline & *data collection plan*

• CI tool · Baseline & data collection plan

P · Plan

Decide exactly what counts before you measure. Then measure two ordinary weeks, before you change anything.

Baseline from: _____ to: _____ Reviewed in: _____

Measure	**Operational definition** exactly what counts	**Source**	**Who collects**	**How often**	**Baseline**

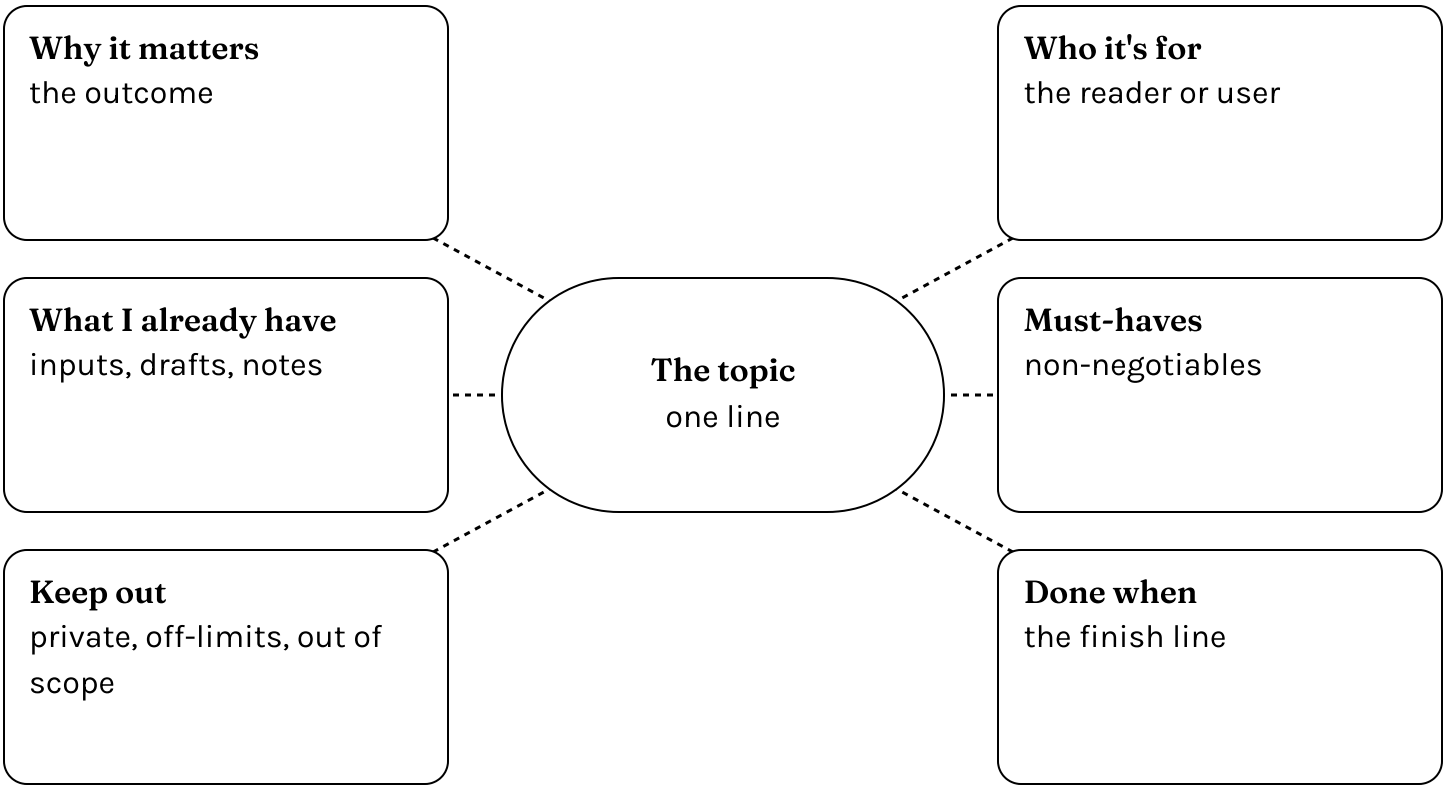
Write the definition before you look at the number.

6 A3 brief & mind map

• CI tool · A3 brief & mind map

P · Plan

An A3 can stand in for a whole plan-do-check-act cycle on one page. Put the one-off in the middle. Fill the branches before you hand it to a deep-work partner; the branches become the brief's headings.



Background why now	Current state what I have	Goal done when	Plan steps, who	Check how I'll know

The A3: the same brief on one page. The mind map's branches fill it in.

7 Virtual 5S

• CI tool · Virtual 5S D · Do

Files, inboxes and notes, organized like a well-run workshop. Do the first pass once; then keep the weekly shine.

Step	What it means	My action	Done
1 · Sort	Delete or archive what you don't need		☐
2 · Set in order	One home for each kind of information		☐
3 · Shine	Weekly clean-up: Downloads, desktop, inbox		☐
4 · Standardize	Naming, and where things go		☐
5 · Sustain	A routine that keeps it tidy		☐

The weekly shine · 15 min

- ☐ Downloads emptied
- ☐ Desktop holds this week's work only
- ☐ Inbox sorted into piles
- ☐ Stray files renamed to the standard
- ☐ Captures filed to a lane
- ☐

My naming standard

_____

_____

Try: date · lane · what it is. My shine day and time: ——————————

8 Standard *work*

CI tool · Standard work

D · Do

The current best way to run a routine, written down. If a step has a clear “done when,” a routine can eventually run it for you.

Routine: _____ Owner: _____ Last revised: _____

Time	Step	Done when	Can a routine run it?

9 Poka-yoke & *jidoka*

• CI tool · Poka-yoke & jidoka

D · Do

For each routine or helper, name what could leave the house (send, spend, book, delete), how we make the safe path the easy one, and where it stops and asks for us.

Routine or helper	**What could leave the house**	**Poka-yoke** how the safe path is the easy one	**Jidoka** where it stops and asks	**If it breaks** how it tells us

Our one rule: if it leaves the house, it waits for a yes. When unsure, the item goes in “Needs you.”

10 Kanban board *& WIP limits*

• CI tool · Kanban & WIP limits

D · Do

One card per item. Set a small limit on Doing and on Waiting on you; when a column is full, nothing new moves in until something moves out.

Week of: _____ Doing limit: _____ Waiting-on-you limit: _____

Captured	Doing · limit ___	Waiting on you · limit ___	Done

The Level-week planner is the same idea at a different level: the week instead of the day-to-day items. Also see Visual management & andon in Act.

11 Level-week planner *(Heijunka)*

• CI tool · Heijunka D · Do

Spread the week evenly: a little deep work, admin, people time and home each day, instead of spikes. Keep one day free.

Week of:

Day	Deep work	Admin	People	Home	Load light · ok · heavy
Mon					
Tue					
Wed					
Thu					
Fri					
Sat					
Sun	Kept free · being present				

Any day marked heavy? Move one block to a light day before the week starts.

Same idea as the Kanban board and other visual boards, at a different level: the whole week.

12 RACI *chart*

• CI tool · RACI chart D · Do

One row per recurring task. Exactly one A per row. If it leaves the house, the A is you.

Task	Me	Chief of staff	Specialist	Specialist

R Responsible · does the work **A** Accountable · owns it, gives the yes **C** Consulted · asked before

I Informed · told after

13 FMEA-*lite*

• CI tool · FMEA-lite D · Do

For each agent or routine: what could go wrong, how bad, how likely, and the guardrail that prevents it. Re-check when a new bot joins the team.

Agent / step	What could go wrong	Effect	Severity H · M · L	Likely H · M · L	Guardrail

Standard guardrails: drafts not sends (poka-yoke) · stops and asks (jidoka) · heartbeat, fail loud.

14 Control Tower *KPI sheet*

• CI tool · Control Tower C · Check

One page that tells you whether the system is working. Pick three to six measures, tie each to your future self or a macro-plan theme, and review them weekly in the week-ahead, not daily. This is also our Check: see where we are and act on anything not performing the way we expect. Your first reading, before you change anything, is your baseline.

Week of: _____ Reviewed in: _____

Measure	**Why it matters** which theme it serves	**Target**	**This week**	**Status** green · amber · red	**Trend**
				G · A · R	↑ → ↓
				G · A · R	↑ → ↓
				G · A · R	↑ → ↓
				G · A · R	↑ → ↓
				G · A · R	↑ → ↓
				G · A · R	↑ → ↓

By specialist · one number each

_____

_____

_____

_____

Color rules

- ☐ Green: handled, no action
- ☐ Amber: needs a glance
- ☐ Red: needs a decision

Ideas: routines on time · decisions waiting on me · inbox calm · rocks on track · first-pass approvals · days kept for being present · time where I meant it.

15 Flow *metrics*

• CI tool · Flow metrics C · Check

Pick a handful of tasks or items. For each one, jot when it was asked for, when we started it, when it was done, and how much of that was real working time. Bring the averages to the Control Tower KPI sheet.

Week of: _____ Reviewed in: _____

Cycle time

How long one task takes from the day we start it to the day it's done. A long one can point to a bottleneck or a place work keeps stopping.

Process time

The time we actually spend working on it, without the waiting.

Lead time

How long from when it's asked for to when it's delivered. A long one can show where delays hide along the way.

Task or item	**Asked for** date	**Started** date	**Done** date	**Process time** hands on	**Cycle time** start → done	**Lead time** ask → done

Average cycle time: _____ Average lead time: _____ Carryover into next week: _____

Short cycle time plus low carryover means work is flowing. If carryover climbs, we take on less, not more.

16 Say vs. do *review*

• CI tool · Say vs. do review C · Check

Do it once before you change anything to capture a baseline, then monthly or quarterly to check and to close the loop. List what you say matters (from your future-self values), then pull the facts from your calendar or a time audit. No grades: one observation, one small experiment, check again next month.

Month / quarter: _____ Facts from: _____ Check again on: _____

What I say matters	Rank	Hours this month	% of time	Gap bigger · smaller · fine	One experiment

One observation

The biggest gap, in neutral words. Facts, not judgment.

One experiment for next month

Small, specific, on the calendar. Then check it (PDCA).

17 Gemba */ waste walk (8 wastes)*

• CI tool · Gemba / waste walk C · Check

Gemba means go and look. Walk one real loop with real data (screenshots, a week of inbox and calendar). For each step, write what really happens and tag the waste with a DOWNTIME letter.

Process walked: _____ Date: _____ Real data used: _____

Step	What really happens	Waste DOWNTIME letter	Idea to remove it
Capture			
Triage			
Decide			
Do			
File			

D Defects **O** Overproduction **W** Waiting **N** Non-utilized talent **T** Transportation **I** Inventory **M** Motion **E** Extra processing

18 Pareto *tally (80/20)*

• CI tool · Pareto 80/20 C · Check

Tally a month of one thing (emails by kind, tasks by type, hours by lane). Sort biggest first, add a running total, and circle the few that make about 80%.

What I'm tallying: _____ Period: _____

Category	Tally	Count	%	Running %

The vital few

_____

_____

One rule that handles them

_____

_____

A filter, a pile, a routine, or an unsubscribe. AI proposes; you approve.

19 5 *Whys*

• CI tool · 5 Whys C · Check

RCA (root cause analysis), part one: 5 Whys pairs with the Fishbone / CEDAC sheet to dive deeper into causes. When something slips, ask why until you reach a cause you can fix. Stop when the answer is a process, not a person.

What happened: _____ When: _____ How often: _____

Why?	Because…	Evidence
Why 1		
Why 2		
Why 3		
Why 4		
Why 5		

Root cause

_____

_____

Countermeasure · check on

_____

_____

Then check it next month (PDCA).

20 Fishbone / *CEDAC*

• CI tool · Fishbone / CEDAC

C · Check

RCA (root cause analysis), part two: CEDAC extends the fishbone and pairs with 5 Whys to dive deeper into causes. Write the problem in the middle. Brainstorm possible causes under each category, then circle the likeliest and test it with 5 Whys.

Method

the routine and its steps

Tools

apps and bots

Inputs

what arrives, from where

The problem →

People

me, my spouse, the team

Timing

rhythms and schedules

Environment

busy seasons, travel weeks

21 Control plan *& signal vs. noise*

• CI tool · Control plan

A · Act

For each Control Tower measure: what normal looks like, who checks it, the signal that means act, and the reaction.

Measure	Normal range	Checked by · how often	Signal: act when…	Reaction

Signal vs. noise: one odd week is noise. A run of three drifting the same way, or a point outside the range, is a signal.

22 Visual management & *andon*

• CI tool · Visual management & andon

A · Act

One glance, not a read. Sort this week's items by color, put anything red in “Waiting on you,” and keep the page short.

Week of:

Waiting on you

○ Green · handled

◌ Amber · needs a glance

● Red · needs a decision

Mon	Tue	Wed	Thu	Fri	Sat	Sun

23 Leader standard work *& tiered rhythms*

• CI tool · Leader standard work & tiered rhythms

A · Act

A steady rhythm of check-ins keeps the system honest. For each tier, write when it happens, what we look at, who brings the numbers, and how we know it's done.

Tier	When	What we look at	Who brings it	Done when
Tier 1 · Daily				
Tier 2 · Weekly				
Tier 3 · Monthly				
Quarterly · the map				

Ideas: a morning brief · a week-ahead · a monthly say-vs-do review · a quarterly SIPOC check-in. Keep one day free, away from screens.

24 PDCA feedback *log*

• CI tool · PDCA feedback log

A · Act

PDCA is kaizen at its core. Every time you edit or turn down a draft, jot what you changed and what the system should keep. Then save it where your AI will read it next time.

Plan	*Do*	*Check*	*Act*
AI drafts from notes	I review: yes / edit / no	What I changed or rejected	Save as style, rule or preference

Date	Draft / task	Check: what I changed or rejected	Act: the lesson	Saved as style · rule · preference

Examples: “warmer, shorter” → style · “never say X” → rule · “always cc Y” → preference.