

Workflow Metrics Tracking Worksheet

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Business Information

Business Name:

Tracking Start Date:

Process Being Measured:

Completed By:

Baseline Measurements & Targets

Metric	What It Measures	Your Baseline	Your Target	Ideal Range
Cycle Time	Total time from task start to completion			Varies by process
Throughput	Completed tasks per time period			Depends on team size
First Pass Yield	% completed correctly without rework			Above 90%
Capacity Utilization	% of time on productive work			75% to 85%
Cost Per Transaction	Cost to complete one unit of work			Lower over time

Monthly Tracking (Record Your Measurements Each Month)

Metric	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
<i>Date (MM/YYYY)</i>						
Cycle Time (days/hours)						
Throughput (units/period)						
First Pass Yield (%)						
Capacity Utilization (%)						
Cost Per Transaction (\$)						

Monthly Review Notes (Complete During Your 15-Minute Monthly Review)

Review Question	Your Response	Action Items
What improved this month?		
What still needs attention?		
What one change will you make next month?		
Any process bottlenecks identified?		

= Input field (fill in your data)

Tip: Start with one metric. Measure for 2 to 4 weeks to establish your baseline before setting targets.