



SCOTT BALES CONSULTING ACADEMY

LEAN SIX SIGMA

GREEN BELT

Professional Workbook

WORKBOOK

Recommended Green Belt Project Qualification Standard: \$25,000 Annualized ROI

Operational Excellence - Lean Manufacturing - Continuous Improvement

Version 1.0

Student Information

Use this workbook while completing the course. Choose one real process whenever possible and apply the tools throughout the workbook. Keep answers factual and process-focused.

Student Name	Company	Department

Supervisor / Instructor

Start Date

Completion Date

Project Title

Project Selection Worksheet

Select a meaningful project with measurable business impact.

Potential Project

Business Problem

Expected Benefits

Estimated Annual ROI

Voice of the Customer Worksheet

Capture customer needs, expectations, and pain points.

Customer Group	Requirement	Current Gap

CTQ Tree Worksheet

Translate customer need into measurable requirements.

Customer Need	Requirement	CTQ Measure	Target

Project Charter

Define the project before detailed work begins.

Problem Statement

Business Case

Goal Statement

In Scope

Out of Scope

Project Team

Stakeholder Analysis

Understand support, influence, and communication needs.

Stakeholder	Influence	Support Level	Action Plan

SIPOC Worksheet

Define high-level process boundaries.

Suppliers	Inputs	Process	Outputs	Customers

Current State Process Map

Document the real process as it operates today.

Step	Owner	Cycle Time	Delay/Waste

Swimlane Process Analysis

Identify handoffs and rework loops across functions.

Department / Function

Activities

Handoffs

Rework Loops

Improvement Opportunities

Data Collection Plan

Plan credible data collection before analysis.

Metric

Operational Definition

Collection Method

Owner

Frequency

Sample Size

Baseline Performance Assessment

Establish current performance before improvement.

Metric	Current State	Target State

Measurement System Review

Assess whether the measurement method can be trusted.

Measurement Method

Potential Sources of Error

Consistency Verified?

Actions Required

Pareto Analysis Worksheet

Focus on the vital few issues.

Issue Category	Frequency	Percentage

Root Cause Validation Worksheet

Validate causes with evidence.

Potential Root Cause	Evidence Supporting	Evidence Against	Validated?

5 Why Analysis

Drill down to a controllable process cause.

Problem Statement

Why #1

Why #2

Why #3

Why #4

Why #5

Verified Root Cause

Cause and Effect Matrix

Prioritize input variables against CTQs.

Input Variable	Impact on CTQ	Priority

FMEA Worksheet

Evaluate risk before and after action.

Step	Failure Mode	Effect	Cause	RPN

Improvement Plan

Convert root causes into actions.

Root Cause	Countermeasure	Owner	Due Date	Expected Result

Pilot Test Plan

Test improvement before full rollout.

Improvement Being Tested

Success Criteria

Start Date

End Date

Pilot Results

Change Management Plan

Plan communication, training, and adoption.

Stakeholder Group

Potential Resistance

Communication Plan

Training Plan

Implementation Tracker

Track implementation to closure.

Action	Owner	Due Date	Status

Control Plan

Define how the process will be sustained.

Control Item

Monitoring Method

Frequency

Owner

Reaction Plan

Financial Validation Worksheet

Document credible project savings.

Savings Category

Description

Annual Savings

Validation Method

Approved By

ROI Calculator

Calculate annual financial impact.

Annual Savings

Project Cost

Net Annual Benefit

ROI Percentage

Meets Recommended Green Belt Standard?

Project Storyboard Planner

Prepare a clear project summary.

Problem

Baseline

Root Cause

Improvements

Results

Control Plan

Green Belt Project Summary

Summarize results and lessons learned.

Project Title

Business Problem

Root Cause

Improvement Implemented

Annual Savings

ROI

Key Lessons Learned

Green Belt Completion Checklist

Confirm completion of Green Belt learning and project work.

Requirement	Complete	Initials