ROGER BOWN
OPERATIONS / SUPPLY CHAIN / ERP

TEAM WORKSHEET

Where is performance getting lost?

Use these questions with your team to review service, stock, flow, cost and accountability. Tick a statement only when you can support it with evidence.

Business / site: ______________________ **Date:** ______________

Participants: ______________________________________

01 Customer delivery and service reliability

- [ ] We can see on-time, in-full delivery against the original customer promise.
- [ ] We understand which customers, products and locations account for missed deliveries.
- [ ] We can distinguish material shortages, production delays and fulfilment failures.
- [ ] Teams agree which service failures need action first and who owns the response.

Evidence / gap: ______________________________________

Measure to review: OTIF, overdue orders, backlog age and customer complaints.

02 Inventory and planning decisions

- [ ] Stock is visible by item, location and demand, including slow-moving and obsolete items.
- [ ] Replenishment rules reflect actual demand variability and realistic lead times.
- [ ] Demand, supply and finance agree one set of priorities through a regular planning process.
- [ ] The team can explain why shortages and excess stock exist at the same time.

Evidence / gap: ______________________________________

Measure to review: Inventory value, stock availability, aged stock and forecast error.

Start with facts. Use a shared period and agreed definitions. Treat missing evidence as a question to investigate, rather than a conclusion about poor performance.

Turn the gaps into priorities.

Look for constraints and repeated causes. Link each proposed action to customer service, profitability, cash or capacity.

03 Production and fulfilment constraints

- [ ] We know where work waits and which constraint limits end-to-end throughput.
- [ ] Capacity plans include changeovers, downtime, quality losses and labour availability.
- [ ] Material and information reach the next step when needed, without repeated expediting.
- [ ] Improvement work is assessed against total business flow, not only local utilisation.

Evidence / gap: ______________________________

Measure to review: Throughput, queue time, schedule adherence and first-pass quality.

04 Cost visibility and ownership

- [ ] We understand cost to serve by relevant customer, channel, product or service group.
- [ ] We can identify expediting, rework, overtime and handling costs that hide in totals.
- [ ] Every improvement has a clear owner, a baseline and an agreed measure of success.
- [ ] Finance and operations distinguish cash released, cost avoided and realised savings.

Evidence / gap: ______________________________

Measure to review: Contribution, cost to serve, working capital and verified benefits.

Agree the next three actions

Priority / evidence to resolve	Owner	Review date
1.		
2.		
3.		

A useful first step: agree one important gap, the evidence needed, the person responsible and the date you will review it. If you need support, discuss a performance review with Roger Bown.