

The baseline worksheet

A fill-in template for defining the metric before anything is built. Prints to a usable A4 worksheet.

How to use this worksheet

This is the document we complete in week one of a pilot, before anything is built. It exists because a result is only a result relative to something agreed in advance. A baseline written after the fact is a negotiation, and the vendor usually wins that negotiation, which does not serve you even when the work was good.

Print it, or download the PDF and fill it in on screen. Allow twenty minutes and have the person who owns the number in the room. If you cannot complete section three, stop: measuring the current state is your first project, and it is smaller and cheaper than the one you were about to start.

One workflow per sheet. A baseline covering "our intake process" across three teams is not a baseline, it is a topic. If two teams do the work differently, they need two sheets and they will produce two different numbers.

1. The workflow

Describe the work in one sentence, starting with the trigger and ending with the finished state.

What starts it, and what system does it arrive in?

What counts as finished, and what system records that?

Who does it today, and how many people are trained to do it?

2. The metric

One primary metric. Not three. If you cannot choose, the group does not yet agree what the problem is, and that disagreement will surface at the worst possible moment.

The primary metric is:

Its unit is (minutes per item, items per person per day, days elapsed, dollars per item, per cent of items):

Two guardrail metrics that must not get worse. These exist so that "faster" cannot be bought with "wrong" or "more expensive".

3. The current number

Volume: how many times does this happen in a month?

Current value of the primary metric:

Spread: the best and worst you have seen, or the tenth and ninetieth percentile if you have the data.

Period this covers, with dates:

Loaded hourly cost used for any dollar figures, and where it came from:

Record the spread, not just the average. Most operational workflows have a long right tail, and the tail is usually where both the cost and the improvement are. An average alone will hide whether anything changed for the items that hurt.

4. The measurement method

The after figure has to be produced the same way as the before figure. Write the method down now so that nobody can improve the number by changing how it is counted.

Where does the number come from (system report, time tracking, manual sample, export)?

Who pulls it, and how often?

What is explicitly excluded from the count, and why?

If the measurement is a sample rather than a census: sample size, and how items are selected.

What else is changing in this period that could move the number on its own?

5. The target and the stop condition

Target value of the primary metric, and the date you will read it:

The stop condition. Complete this sentence: we will stop this work and not deploy if, by the read date, the following is true.

Maximum acceptable exception rate, meaning the share of items a person has to correct or redo:

What happens to the freed capacity: is it redeployed, is headcount held, or is volume expected to grow into it?

The stop condition is the most valuable line on this sheet. A project with no agreed way to fail does not have a way to succeed either; it has a way to continue. Write a stop condition you would actually act on and get the owner to initial it.

6. Sign off

ROLE	NAME	DATE
Owner of the metric		
Team lead for the work		

ROLE	NAME	DATE
Person who pulls the number		
Implementation partner		

How baselines go wrong

Four failures account for most disputed results, and all four are avoidable at this stage rather than at the end.

- **The definition moves.** The before figure counted every item; the after figure quietly counts only the ones the agent handled. Section four exists to prevent this, which is why the exclusions line is there.
- **The baseline period is unusual.** A baseline captured over the Christmas fortnight or during an outage flatters everything that follows. Use a period the team recognises as ordinary, and write the dates down.
- **Something else changed too.** A new system, a restructure, a staff departure or a pricing change in the same window will take credit that belongs elsewhere. Note them now, not later.
- **Nobody owns the number.** If the person who pulls the figure has no stake in it, the figure arrives late, in a different format each time, and eventually as an estimate.

A completed sheet is a short document, and that is the point. It should fit on two pages, be readable by somebody who was not in the room, and be settled before a single line of anything is built.