Break the Bottlenecks

## Bottlenecks cause inefficiencies and present obstacles to scaling. Use this assessment to identify the current (or potential) problem points in your research program, then outline a plan for overcoming those problem points to enable a more scalable approach.

#### Step 1: Identify Bottlenecks. Answer the following questions to help identify bottlenecks:

|  |  |  |
| --- | --- | --- |
| **Assessment Question** | **Yes** | **Notes** |
| **People-related Bottlenecks** |  |  |
| -Are any tasks overly reliant on you (the PI/ leader)? |  |  |
| -Are team roles and responsibilities unclear? |  |  |
| -Are any team members overwhelmed? |  |  |
| -Are any team members underutilized? |  |  |
| **Process-related Bottlenecks** |  |  |
| -Are there steps that take longer than expected? |  |  |
| -Are any recurring steps/tasks missing SOPs? |  |  |
| -Is delegation consistent and effective? |  |  |
| **Tool/Equipment-related Bottlenecks** |  |  |
| -Are tools/equipment/platforms you use effective? |  |  |
| -Are there gaps in technology adoption among team members? |  |  |
| -Is finding information or troubleshooting tools/equipment/platforms a frequent issue? |  |  |

#### Step 2: Root Cause and Action Plan. For any questions where you answered yes above, you may have a bottleneck to address. What is the specific bottleneck, and what is the root cause? Keep asking "Why?" until you reach a fundamental issue that is driving the problem.

#### Next, see if you can determine an action that you or your team can take toward alleviating this bottleneck. Remember, small shifts tend to be easier to adopt than major overhauls, but sometimes major overhauls are necessary.

Finally, assign a priority level (low, medium, urgent) and a target date for taking steps to address this pressure point.

1. Bottleneck: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Root Cause: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Potential Action: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Priority level: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Target date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Bottleneck: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Root Cause: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Potential Action: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Priority level: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Target date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Bottleneck: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Root Cause: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Potential Action: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Priority level: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Target date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_