

Prioritization worksheet: setup and gate

Use with the HKN-CIM-001 guide. Fill in the setup, then run the gate for every idea (guide Section 3.1). Choose one gate result per idea. Gated ideas are not scored. Copy the numbers to page 2 for the ideas that pass.

Site or value stream		Quarter	
Chair		Gate answered by (QA)	
Hours available		Gated hours	
		Hours left	

No.	Idea: problem and proposed change	Owner	Pass	G1 QMS path	G2 Design	Capital (G3)
01			☐	☐	☐	☐
02			☐	☐	☐	☐
03			☐	☐	☐	☐
04			☐	☐	☐	☐
05			☐	☐	☐	☐
06			☐	☐	☐	☐
07			☐	☐	☐	☐
08			☐	☐	☐	☐
09			☐	☐	☐	☐
10			☐	☐	☐	☐
11			☐	☐	☐	☐
12			☐	☐	☐	☐
13			☐	☐	☐	☐
14			☐	☐	☐	☐
15			☐	☐	☐	☐

Gate questions. G1: responds to an open nonconformance, complaint trend, CAPA, audit finding, or an unacceptable risk in the risk management file? G2: changes device design, labeling, or intended use? G3 (flag only): spend above the site capital approval limit? If G1 or G2 is yes, route the idea to your QMS and don't score it.

Prioritization worksheet: scores

Enter whole numbers 1 to 5 using the anchors in guide Section 3.3. Impact = sum of each I score times its weight. Effort = sum of each E score times its weight. Index = impact minus effort. Quadrant code: QW Quick Win, MP Major Project, FI Fill-in, RC Reconsider.

No.	I1	I2	I3	I4	I5	E1	E2	E3	E4	Impact	Effort	Index	Quad.
Wt.	20	30	25	15	10	25	20	20	35	% weights, each group totals 100			
01													
02													
03													
04													
05													
06													
07													
08													
09													
10													
11													
12													
13													
14													
15													

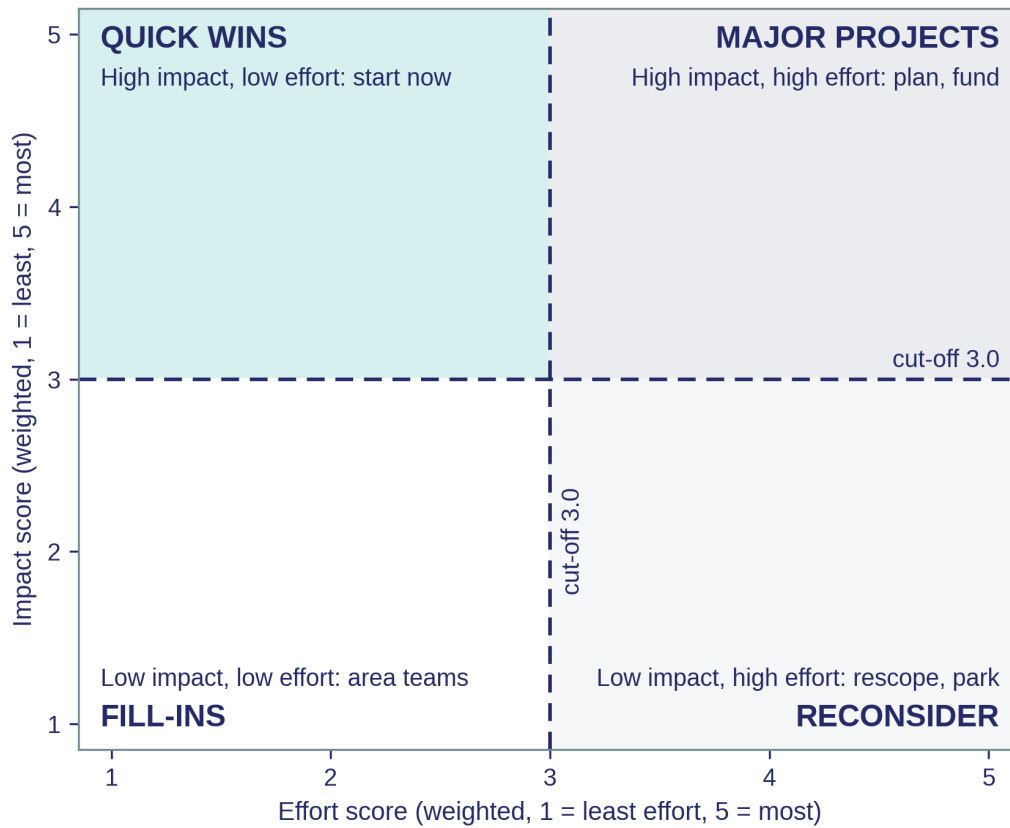
Counts

Quick Wins Major Projects Fill-ins Reconsider

Cut-off 3.0 on both axes; exactly 3.0 counts as high. Discuss any idea 0.25 or less from a cut-off before accepting its quadrant. Order inside a quadrant: highest index, then higher impact, then lower E4, then lower idea number.

Prioritization worksheet: matrix and decision

Plot each scored idea by its number. Effort runs left to right, impact bottom to top. Then record the decision and sign off.



Start this quarter (IDs, in order)

Major Projects to scope

Parked or rescoped

Notes and ideas flagged Discuss

Assessed by

Date

Scores are structured estimates. This worksheet supports a management decision; it is not a business case, risk assessment, or change approval, and it never overrides the QMS.