SOP WAREHOUSESOP

FREE PRINTABLE CHECKLIST

KPI and SLA Management Checklist

Best practice: no regulation governs this procedure, so none is cited.

FACILITY	AREA OR EQUIPMENT ID	DATE	SHIFT
INSPECTED BY (PRINT)		SIGNATURE	

1. Procedure checks

Tick each step as it is done, in this order.

DONE	CHECK	NOTES
☐	Post yesterday's numbers on the huddle board before the start-of-shift meeting, from the source report, never from memory	
☐	Walk the board in under ten minutes: green gets a nod, yellow gets a comment from the owner, red gets a same-day action	
☐	Use the catalog definition when anyone questions a number; the catalog text settles it	
☐	Log a variance investigation when a metric misses its period target or runs yellow two weeks straight	
☐	Route every systemic miss and every contractual SLA miss into CAPA, not just the meeting minutes	
☐	Send the customer scorecard on its contractual day, good month or bad, through the account manager only	

2. Compliance checks

Tick each item that is in place.

DONE	CHECK	NOTES
☐	Every reported metric appears in the KPI catalog with an exact formula, named data source, pull timing, single named owner, and target with a stated basis	
☐	Internal targets for contractual metrics are set tighter than the SLA commitment so normal variation does not breach the contract	
☐	The daily huddle board is updated before the start-of-shift meeting and every red metric gets a same-day action	
☐	The weekly ops review covers trends and open variance investigations; the monthly management review covers the full catalog, SLA reconciliation, and trailing twelve months	
☐	The SLA register lists each customer's contractual metrics, committed levels, measurement windows, and penalty and credit mechanics, using the contract's definitions	
☐	Customer scorecards are produced from the same source data as internal numbers and delivered on the contractual schedule every month, including bad months	

☐	Every systemic miss and every contractual SLA miss is routed into CAPA with an owner, due date, and effectiveness check	
☐	A metric missing three consecutive months forces either a corrective action plan or a documented retargeting at the management review	
☐	The annual KPI review retires metrics that drove no decisions, resets targets with a stated basis, and lands as a versioned catalog update under document control	
☐	Twelve months of scorecards and management review minutes are retained and retrievable as customer and RFP evidence	

WARNINGS

Never adjust or overwrite a published number quietly; corrections are made visibly with a note

Never let a target move just because it was missed; targets change only at the annual review or with a contract change

Never hold a scorecard back in a bad month; a late or skipped report damages the account more than the miss

SUPERVISOR REVIEW

REVIEWED BY (SUPERVISOR)	SIGNATURE	DATE