Problem Statement Worksheet: example

Illustrative example, not customer data. The same worksheet, blank, is on the next page.

	Answer
Ideal state	Items arrive undamaged: damaged-on-arrival complaints at or under 1.5% of orders (1.2% over the past year)
Current state	Damaged-on-arrival complaints are 4.8% of orders: 486 complaints on 10,125 orders in the week of 18 May
Since when	Three weeks: since the week of 4 May
Where it happens (is)	Orders shipped from our warehouse; 394 of the 486 complaints (81%) are on orders over 2 kg
Where it does not (is not)	Orders shipped by marketplace sellers: no change
Impact	About $15,100 in replacements and reshipping in the week of 18 May; damage is the top topic in 1- and 2-star reviews
Evidence	Ticket tags, order data, review topics
Still unknown	Whether one product line or one carrier is over-represented
Problem statement	Damaged-on-arrival complaints rose from 1.2% to 4.8% of orders shipped from our warehouse in the three weeks since the week of 4 May, mostly on orders over 2 kg, costing about $15,100 a week in replacements.

Next: find the cause with the 5 Whys template, then fix it with the corrective action plan template (same example).

Need the numbers behind your problem statement? Pivony groups all of your tickets, reviews and survey comments by topic and shows how each one trends. Get a free root cause audit on your own data: pivony.com/free-rca-audit

Problem Statement Worksheet

Facts and numbers only. Leave the cause and the solution for later.

Question	Prompt	Answer
Ideal state	What should happen? Use the usual number.	
Current state	What happens now, with numbers?	
Since when	When did it start?	
Where it happens (is)	Which products, sites, channels or customers?	
Where it does not (is not)	Where would you expect it, but it is not there?	
Impact	What does it cost customers and the business?	
Evidence	Where do the numbers come from?	
Still unknown	What do you not know yet?	
Problem statement	One or two sentences: what, where, since when, how much against the baseline, and the impact.	

Next: find the cause with the 5 Whys template, then fix it with the corrective action plan template (same example).

Need the numbers behind your problem statement? Pivony groups all of your tickets, reviews and survey comments by topic and shows how each one trends. Get a free root cause audit on your own data: pivony.com/free-rca-audit

Six problem statements, before and after

Before	What is wrong with it	After
Customers are unhappy with delivery.	Vague: no number, no scope, no baseline	Delivery complaints rose from 2.1% to 3.6% of orders in October, mostly on next-day orders to rural postcodes.
We need a new CRM because tickets get lost.	Contains a solution	14% of support tickets in Q3 got no first reply within 48 hours (target: under 2%), across all channels.
The night shift is careless with returns.	Blames people; no data	Refunds take 9 days on average (target: 3) for returns received after 18:00; returns received in the day take 3.
Our app rating dropped because of the new update.	Assumes the cause	The app rating fell from 4.5 to 3.9 in the two weeks after version 6.2; 1-star reviews that mention logging in rose from 12 to 140 a week.
Hotel guests complain about the Wi-Fi.	No size, no scope	Wi-Fi comes up in 24% of business travellers' reviews last quarter (74 of 312), mostly about rooms on floors 5 and 6.
Call volume is too high.	Not specific: which calls, compared with what?	Repeat calls (same customer, same issue, within 7 days) are 38% of all calls in November, up from 22% a year ago.

Checklist: is it a good problem statement?

#		Yes / No
1	It describes the gap between what should happen and what happens	
2	It has a number and a baseline	
3	It says where and since when, and where it does not happen	
4	It names the impact on customers or the business	
5	It has no cause in it (no "because")	
6	It has no solution in it (no "we need a new...")	
7	It blames no person or team	
8	Someone outside the team would understand it	

Need the numbers behind your problem statement? Pivony groups all of your tickets, reviews and survey comments by topic and shows how each one trends. Get a free root cause audit on your own data: pivony.com/free-rca-audit