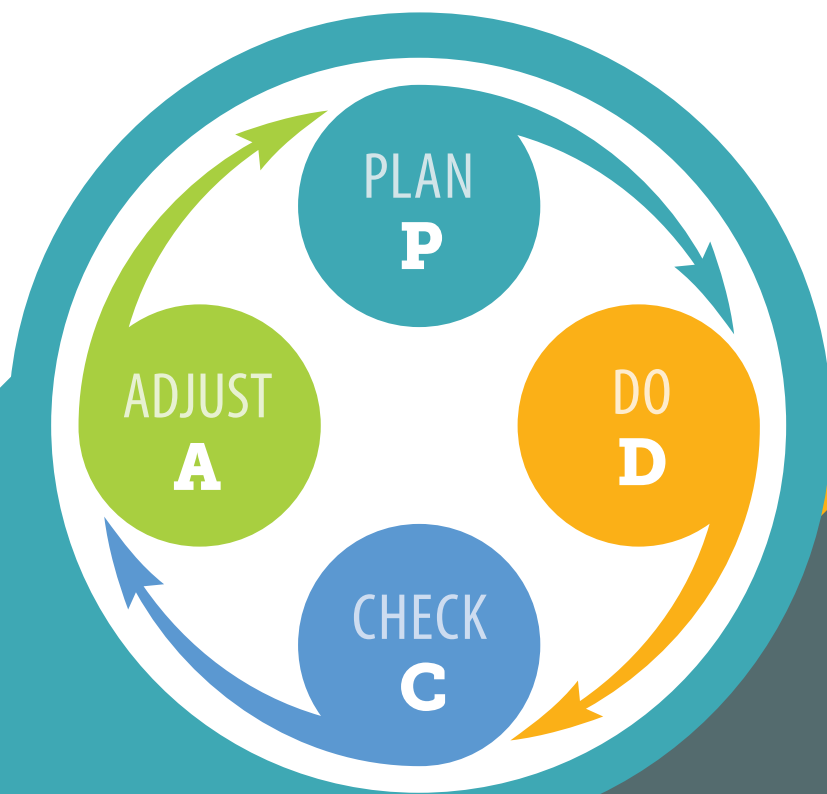


It **starts** with a **process**

A guide to using PDCA for continuous improvement



Office of the Washington State Auditor

January 2026

Center for
Government
Innovation

PDCA

Introduction

Nearly every task in an organization involves a workflow or process. Over time, staff turnover, customer needs or technology can make processes less efficient or effective. When that happens, it's time to review and improve those processes. This is where Lean helps.

Lean is a method for improving processes in all types of work. It encourages innovation, makes existing work more efficient and creates services that are more customer-focused and empowering for staff.

A core Lean tool is the PDCA cycle: Plan-Do-Check-Adjust. PDCA gives teams a clear, repeatable way to test changes, learn from results and keep improving continuously.

Lean provides the mindset for solving problems, and PDCA offers the structure to make progress visible and sustainable. Together, they help organizations move from reacting to problems toward systematically improving outcomes, starting small, learning fast and building better processes over time.

1. What is PDCA, and why does it matter?

Just like IT policies lay the foundation for secure operations, PDCA (Plan-Do-Check-Adjust) lays the foundation for resilient, efficient processes. PDCA is a four-step, repeatable cycle that helps teams improve processes, solve problems and build critical thinking.

This cycle is derived from the scientific method and encourages small, thoughtful tests of change. Statistician Walter Shewhart introduced the method, and W. Edwards Deming later popularized it. Originally called "Plan-Do-Study-Act," many organizations now say "Check" or "Adjust" to focus on practical review and ongoing improvement.

PDCA offers a simple but powerful framework that teams can use in almost any setting: whether solving operational challenges, reducing waste, standardizing processes or fostering innovation. Most importantly, it helps teams move from guessing to learning.

This shift turns "We think this will help," into "We tried it, we measured it and here's what we'll do next." This guide includes key questions to help teams use the PDCA tool to create better workflows, make faster decisions and gain more reliable results.

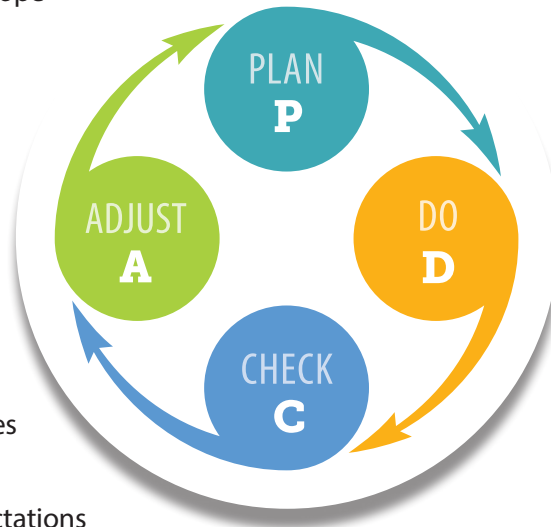
PDCA Improvement Cycle

Step 1. PLAN the change

- Create "what/why" problem statement
- Define target conditions and scope
- Identify players and roles
- Understand current state
- Create improvement plan
- Share plan with stakeholders

Step 4. ADJUST to standardize

- Establish adjusted process
- Update roles and responsibilities
- Provide training
- Communicate status and expectations
- Create or update documentation
- Capture lessons learned



Step 2. DO the trial

- Evaluate the result of the change
- Measure progress to target
- Identify unforeseen consequences

Step 3. CHECK for improvement

- Risk based roll out
- Communication plan
- Collect data and monitor results

2. Why use PDCA?

Ideas often go untested or unmeasured. We jump to solutions without understanding the root cause. We make big changes without checking if they work, or we get stuck in planning and never try anything at all.

PDCA gives teams a reliable way to move from problem to progress. It brings structure and discipline to improvement work so teams can try changes on a small scale, learn from what happens and adjust based on real-world results. Instead of spending weeks or months rolling out a solution that may not work, PDCA helps teams learn quickly, then build from success or pivot if needed.

By using PDCA, you reduce risk, improve buy-in and increase your chance of lasting

success. You also create a culture in which teams ask questions, test ideas and keep improving; not just once, but over time. In that way, PDCA supports not just better projects, but better thinking.

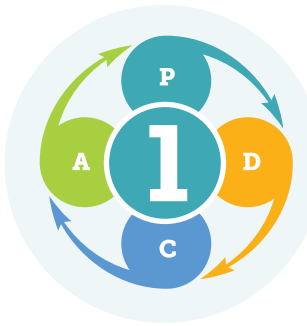
PDCA helps you:

- Solve the right problem
- Test before committing
- Include people closest to the work
- Make data-driven decisions
- Improve continuously

In short: PDCA is how good ideas grow into better outcomes.

3. What are the stages of PDCA?

Stage 1: PLAN



What are you trying to improve, and how will you know it worked?

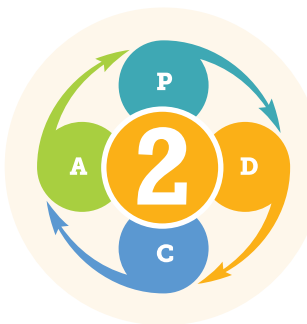
In this step, identify and define the problem or opportunity. Gather facts and current-state data, dig into the root causes and decide what change you want to test. The planning stage is about getting specific and aligning the team.

The plan should include:

- What the goals are
- How we are going to do it
- What resources we need
- Who is responsible for what work
- When the actions will take place

Example: Staff are spending eight hours each week fixing form errors. We think redesigning the form with clearer instructions will reduce errors by 50% within one month.

Stage 2: DO



Try it. Document what you do. Start small.

The “Do” stage is about testing the change. Don’t overhaul the whole system — pilot it. Stay curious, not committed. Make notes as you go.

What to include in the “Do” stage:

- Who did what, when and how
- Any unexpected issues that came up

- Observations and notes, not just results
- Think of “Do” as a learning lab, not a performance review

Example: The team tested the redesigned form with one department for two weeks. Staff used the new version and noted any confusing sections or recurring mistakes. They recorded the number and type of errors in a shared log during daily processing.

Stage 3: CHECK



What happened? What did you learn?

Compare your results to what you expected. Did your change make a difference? If not, why? If it did, was it better, faster or easier?

In the “Check” stage, answer:

- Did we meet our goal?
- What does the data say?
- What did the team observe?
- What should we celebrate or reconsider?

Check = learn. If you skip this, you’re not improving, you’re just guessing.

Example: After two weeks, form errors dropped from an average of 20 to eight per week. Most remaining errors came from missing signatures, not unclear instructions. Staff said the new layout was easier to follow, though some fields needed better spacing. The team met its goal of reducing errors by 50%.

Stage 4: ADJUST



Decide. What’s next?

Now decide what to do based on what you learned:

- **Adopt** — It worked. Make it the new standard.
- **Adapt** — It’s promising. Adjust and retest.
- **Abandon** — It didn’t help. Try a new approach.
- Update others: document the improvement, update training or checklists, and share the lessons.

PDCA is a cycle, not a one-time event. The “Adjust” step sets you up for your next round.

Example: The team adopted the new form and added a simple checklist to prevent missing signatures, which was the last major source of errors. They updated the training materials and shared folder, then rolled out the change to all departments. The team will recheck error rates in one month to confirm the results stay consistent.

4. How teams use PDCA

Frontline Teams

- Identify and fix recurring issues
- Make small tests of change before standardizing
- Use visual templates, such as an A3 report (as defined in the Glossary) or Project Charter, to keep the entire team aligned

PDCA helps staff reduce frustration, waste and rework, and improve the work they do every day.

Managers and Leads

- Coach staff through problem-solving
- Monitor metrics and cycle progress

- Tie changes to operational goals

Managers can use PDCA to lead more effectively, not by having all the answers, but by guiding the learning process.

Executives and Directors

- Align improvement with strategic priorities
- Scale successful PDCA cycles across departments
- Create a culture of experimentation and learning

Leaders use PDCA to build accountability, trust and momentum, from the front lines to the boardroom.

Conclusion

PDCA works best when teams commit to applying it consistently and using each cycle as an opportunity to build better processes and results. The power of PDCA is not in a single round of improvement, but in repeating the cycle over time. Each turn builds knowledge, reduces risk, and strengthens both the process and the people doing the work.

By starting small, learning quickly and adjusting with evidence, organizations can move from reacting to problems toward creating lasting solutions. Whether at the front line, in management or at the executive level, PDCA offers a clear structure to test ideas, measure progress and keep improving.

In short: PDCA is more than a tool, it's a habit of thinking that helps teams deliver better outcomes today and build the capacity for tomorrow.

A3 Report

A one-page problem-solving or improvement report used in Lean. Named after the A3 paper size, it summarizes the issue, analysis and plan in a visual, concise format.

Abandon

In PDCA, stopping an idea that didn't work to try a new approach.

Adapt

In PDCA, making changes to an idea that shows promise, then testing again.

Adopt

In PDCA, making a successful change the new standard practice.

Lean

A method for improving processes by eliminating waste, focusing on value for the customer and continuously improving.

PDCA

Plan, Do, Check, Adjust. A four-step cycle for making improvements by testing changes, learning from results and refining as needed.

Project Charter

A short document that defines a project's purpose, goals, scope and roles, used to align teams before work begins.

Root Cause

The underlying reason a problem happens.

Standardizing

Creating consistent methods or processes so work is done the same way every time.

Glossary



Additional resources:

- [SAO's Resource Library](#) offers a variety of free guides, checklists, best practices and tools to help Washington governments improve internal controls, grants management, procurement practices, financial reporting and cybersecurity.
- [SAO's Lean Services webpage](#) connects you with Lean Specialists who can help you make your government's work processes more effective and sustainable. Whether it's permitting, payroll, purchasing or any other workflow, we can help you develop unique solutions that mean greater success for your organization at no cost to Washington Governments.

For assistance

This resource was developed by the Center for Government Innovation, a service of the Office of the Washington State Auditor. Please send any comments, questions or suggestions to the Center Team at Center@sao.wa.gov.

Disclaimer

This resource is provided for informational purposes only. It does not represent prescriptive guidance, legal advice, an audit recommendation, or audit assurance. It does not relieve governments of their responsibilities to assess risks, design appropriate controls and make management decisions.



“Our vision is to increase **trust** in government. We are the public’s window into how tax money is spent.”

– Pat McCarthy, State Auditor

Washington State Auditor’s Office
P.O. Box 40031 Olympia WA 98504

www.sao.wa.gov

564-999-0818



Office of the Washington State Auditor