

MANUFACTURING LEADERSHIP WORKSHEET

The Critical Success Factor Finder

A structured facilitated session for manufacturing leadership teams to identify the 3–5 Critical Success Factors that will determine operational and commercial performance over the next 12 months.

90–120 MINUTE FACILITATED SESSION

3–5

Critical Success Factors identified

90 mins

Structured leadership session

12 months

Performance horizon

BEFORE YOU BEGIN

How to Use This Worksheet

This worksheet is designed for facilitated group use by manufacturing leadership teams. Read the guidance below before convening your session.

Who

Complete as a manufacturing leadership team — Operations, Finance, Commercial, Supply Chain, and HR — not individually. This is a facilitated conversation, not a solo exercise.

Time Required

Allow 90–120 minutes for a full session. Do not compress this — the quality of debate is the process.

Output

A shortlist of 3–5 agreed Critical Success Factors with clear rationale and ownership assigned to a named leader.

Ground Rule

Everything on the table. No initiative is sacred until it survives the process — including ongoing capital programmes.

FOUNDATION

What Is a Critical Success Factor?

A Critical Success Factor (CSF) is a condition that must be true for your manufacturing organisation to achieve its goals over the next 12 months. It is not a project, a KPI, or an an improvement initiative — it is a strategic imperative.

> "If we get this right, everything else becomes possible. If we get this wrong, nothing else matters."

❌ Not a CSF

"Improve OEE across all lines"

Too broad. Impossible to own. No clear threshold for success.

✅ A CSF

"Achieve and sustain ≥85% OEE on Lines 1–3 by end of Q2 to meet contracted volume commitments."

Specific. Owned. You will know unambiguously whether you succeeded.

STEP 1 OF 5

Step 1 — Brain Dump: List All Competing Priorities

Give each team member **5 minutes** to write down every priority, initiative, or operational challenge they believe is critical for the next 12 months. Think across: production performance, quality, cost, people, capital, supply chain, and customer commitments. No filtering yet.

- Use sticky notes, a whiteboard, or the table below — one priority per item.
- Aim for **15–30 items** across the group before moving on.

#	Priority / Initiative	Raised by
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

STEP 2 OF 5

Step 2 — Cluster and Deduplicate

As a group, review the full list and group similar items. Eliminate duplicates and combine overlapping priorities into single, clearly worded statements. Watch for items that are really the same operational challenge described from different functions (e.g. "reduce scrap" and "improve first-pass yield" may be the same underlying issue). Target: reduce to **8–12 consolidated priorities** before the next step.

Cluster Prompt

"Are these two items really the same underlying operational condition, or are they genuinely distinct challenges?"

Rewrite Prompt

"Can we state this in one sentence that every function leader in this room would agree on?"

Consolidated Priorities List

Use the space below to record your 8–12 consolidated priorities after clustering.

#	Consolidated Priority	Score (Step 3)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		

STEP 3 OF 5

Step 3 — Apply the Prioritisation Matrix

Score each consolidated priority against **two dimensions**. Use a scale of **1–5** for each. Total scores range from 2–10. Higher scores indicate stronger candidates for CSF status. Score **independently first**, then compare — divergence between functions (e.g. Operations vs. Finance) often reveals misaligned assumptions about what the business most needs to protect.

Priority	Strategic Impact (1–5)	Consequence of Failure (1–5)	Total Score (out of 10)	Rank

SCORING REFERENCE

Scoring Guide

Use these definitions to score consistently across the team. Score **independently first**, then compare — divergence between functions reveals hidden assumptions worth surfacing.

Strategic Impact (1–5)

How significantly does success here advance our 12-month operational and commercial goals?

- **1** — Marginal: Incremental improvement, limited strategic movement
- **2** — Moderate: Contributes to one performance area
- **3** — Significant: Advances multiple goals (e.g. cost and quality)
- **4** — High: Core to our site or business unit strategy
- **5** — Transformational: Defines the year's performance outcome

Consequence of Failure (1–5)

How severe is the downside if we underperform here?

- **1** — Recoverable: We can course-correct without lasting damage
- **2** — Noticeable: Some disruption to output or cost targets
- **3** — Damaging: Missed customer commitments or significant cost overrun
- **4** — Severe: Threatens contract retention or site viability
- **5** — Existential: Failure here puts the business at serious risk

Scoring Rule

Items where scores diverge by 2+ points between functions reveal hidden assumptions. Surface and discuss these before averaging — they are often the most important conversation of the session.

Tie-Breaker

When scores are equal, ask: "Which of these would our customer, our board, or our parent company hold us most accountable for failing to deliver?"

STEP 4 OF 5

Step 4 — The Gut-Check Questions

Before finalising, run your top-ranked priorities through these four questions. A true CSF should pass all four. If a priority fails any single test, it is a supporting objective or improvement initiative — not a Critical Success Factor.

1

Necessity

If we fail here, do we fail the year — *regardless of what else we deliver on the shop floor or in the business?*

2

Influence

Do we have meaningful control over this outcome, or is it largely dependent on external factors such as customer demand, raw material supply, or group-level decisions?

3

Clarity

Could every function leader — from Operations to Finance to HR — explain this priority in exactly the same way?

4

Measurability

Will we know — unambiguously, using existing data — whether we have succeeded by year-end?

⚠ **Any priority that fails the Necessity or Measurability test should be reclassified as a supporting KPI or improvement programme, not elevated to CSF status.**

STEP 5 OF 5

Step 5 — Name Your Critical Success Factors

Write your final 3–5 CSFs below. Each should be a **single, precise sentence** — not a category, a theme, or a programme name. Assign a named function leader to each CSF; collective ownership means no ownership.

CSF #	Critical Success Factor (one sentence)	Why it made the cut	Owner	How we will measure it
1				
2				
3				
4				
5				

FINAL CHECK

The Tension Test — A Final Sanity Check

Read your CSFs aloud as a list. Then put a single question to the group:

> **"Do these 3–5 factors genuinely represent the make-or-break conditions for our manufacturing performance over the next 12 months?"**

1

Yes — Commit

You have your CSFs. Commit to them publicly, communicate them to your wider teams, and build a quarterly review into your leadership rhythm.

2

Uncertain — Revisit

Return to Step 3 and re-examine items that scored 7–8. One may have been underweighted — particularly if it relates to a constraint that cuts across multiple functions.

3

Reads Like a Plan — Elevate

If the list reads like a project plan or improvement programme, you have activities — not CSFs. Elevate the language from actions to conditions of success.

⚠ **Warning sign:** If your list contains programme names ("Lean rollout", "ERP implementation", "headcount review"), you are describing activities. A CSF describes the *condition* those activities are designed to achieve.

NEXT STEPS

From CSFs to Action

Agreeing your CSFs is the beginning, not the end. In a manufacturing environment, the gap between strategic intent and shop-floor reality is where performance is won or lost. These steps close that gap.

Communicate — Within One Week

Share the finalised CSFs with all function leaders and their teams. Alignment starts with visibility. Post them in the production office, not just the boardroom.

Cascade — Into Every Function

Each CSF should map to at least one team-level objective and one individual accountability — in Operations, Quality, Supply Chain, Finance, and HR. If a CSF cannot be cascaded, it is not yet specific enough.

Review — Quarterly

Build a quarterly CSF review into your leadership calendar. Use your existing operational data — OEE, OTIF, scrap rates, cost per unit — to assess progress honestly.

Reconvene — When Conditions Shift

If a major customer changes requirements, a key input becomes constrained, or the business faces a structural shift, reconvene this process. CSFs are not set-and-forget.

FACILITATOR REFERENCE

Facilitator Notes

These notes are for the session facilitator. Review before convening the group. In manufacturing leadership teams, certain failure patterns appear consistently — knowing them in advance lets you redirect before the session stalls.

Common Failure Mode: Improvement Programmes vs. Conditions

Manufacturing teams frequently list programmes ("implement TPM", "roll out 5S", "upgrade the MES") rather than the conditions those programmes are designed to achieve ("achieve a stable, predictable production system capable of meeting contracted volumes at target cost"). Push for the underlying condition. Ask: "What does success look like when this programme has worked — not what will we do?"

If Consensus Stalls: Use a Dot-Vote

Give each leader 3 votes to allocate across the consolidated list. Reveal simultaneously to avoid anchoring bias. This is particularly effective in manufacturing teams where Operations may dominate the conversation — the dot-vote surfaces conviction from Finance, HR, and Commercial that might otherwise go unspoken.

If the List Won't Shrink Below 6: Force a Trade-Off

Ask: *"If we could only resource three of these properly — with dedicated leadership time and capital — which three would they be?"* In manufacturing, resource and management bandwidth are finite. The answer to this question usually reveals the true top 5.

A well-facilitated CSF session in a manufacturing business will surface genuine tension between functions — Operations wanting to protect output, Finance wanting to protect margin, Commercial wanting to protect the customer. That tension is not a problem to manage. It is the data. The CSFs that survive it are the ones the organisation will actually commit to.

NEXT STEP

Ready to Turn Your CSFs into Unstoppable Momentum?

This worksheet is the first step. The **Implementation Engine** by New Way Growth is the 90-day programme that guarantees your CSFs land on the shop floor — not just in the boardroom. Built specifically for £5m–£25m engineering and manufacturing firms, it bridges the gap between strategy and daily reality.

Phase 1 — The IE-OS Workshop

A focused, hands-on session to surface your CSFs, build your VTA Matrix™, and align your leadership team around a single operating system.

Phase 2 — 90-Day Framework

Structured check-ins at 10, 30, 60, and 90 days. Clear OKRs, KPIs, owners, and deadlines. Accountability that keeps momentum going.

Investment

Full 90-Day Programme — Strategic Focus Workshop + IE-OS Framework. £5,200 (excl. VAT and travel). Payment options available.

> **"Adam has helped tremendously in moving the dial in that process — his simplistic, no-nonsense approach works."** — Gary L., CEO

Book Your Free 30-Minute Vision-to-Results Diagnostic Call

https://bit.ly/nwgImpEngOS

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