

Tally Sheet



What is a tally sheet?

A tally sheet is a simple, low-tech tool that you can use to count and visually represent the frequency of an event or error in a process.

When should I use it?

- When you want to gather data about the type of problems occurring
- When you want to understand what kind of errors, problems, or complaints occur most frequently compared to less frequent errors and problems
- When doing a rigorous analysis of data is too time consuming or not feasible, and you want staff to get a quick count by hand
- When processes or events need to be monitored and recorded as they occur

How do I facilitate or create it?

- **Decide which obstacles you want to observe.** Write down the obstacle(s) you want to track on a piece of paper and make sure the team using the tally sheet understands what each category means.
- **Decide the time horizon over which you want to track the obstacle(s) on your tally sheet.** You can decide to keep a tally of the obstacle(s) over the span of one day, a week, a month, or even a year.
- **Make sure you know who owns the tally sheet.** You don't want two different people marking the same instance twice!
- **Post the tally sheet** in an area where you or the tally sheet owner can easily add tally marks to the sheet throughout the work day.
- **Begin observation.** Each time that you notice the obstacle or event occurring, write a tally mark next to the obstacle or event category to which the observed obstacle or event belongs.
- **Identify events with unusually high or low occurrences.** Decide whether you want to analyze those occurrences further.

TYPE OF COMPLAINT	FREQUENCY
Personal details incorrect in database	
Error in salary calculation	
Leave history not updated	
Delayed training arrangements	
Pension not remitted	
Incorrect tax calculation	
Working conditions not favourable	
Other	

“Example of a Tally Sheet that can be used to track events and or obstacles that occur”

Tips

- Tally sheets don't always have to come in the form of a hard copy sheet. You can track the frequency of an event by putting beans in a jar every time an event or obstacle occurs or a hashmark on a virtual whiteboard! Get creative with the way you implement tally sheets; tailor it to your team's needs.
- Consider a tally sheet to fill in gaps in your metrics or data. If the database does not allow you to track errors easily, can a staff person track errors manually for a week and report back the findings? You can easily replicate such tracking after solutions have been implemented.