About Us

We specialize in:
- Business Process Analysis & Improvement
- Project Facilitation
- Organizational Productivity Improvement
- Information Technology Planning and Design

- Specific services include Team Facilitation, Consulting, and Training and Mentoring Programs.
- Extensive expertise in the financial services, insurance, manufacturing, and direct response industries.
Your Turn

- Take a Moment to…
  - Introduce yourself to your neighbor
  - Share an experience you’ve had –either positive or negative - in the realm of process improvement
  - Be prepared to share any insights or questions you encounter
Course Objectives

It's our goal to...

- help you be a better facilitator.
- introduce you to a collaborative framework for process assessment.
- give you hands-on practice with key models used in process improvement efforts.
Workshop Overview

Part 1 - Productive Meeting Practices
- Apply Effective Meeting Controls
- Get the Right People Involved
- Improve the Meeting Process

Part 2 - Facilitative Modeling
- Process Decomposition
- Process Mapping
- Wrap Up
Ground Rules- Contract for Working Together

Your Part
- Manage Your Participation
  - Pagers & cell phones on "stun"
  - Return from breaks and lunch on time
  - Limit side-conversations
  - Speak up if you have additional insight or don't agree
- Interact with Respect
  - Keep comments brief
  - Avoid dominating
  - Draw out others
  - Maintain your sense of humor

Our Part
- Manage the Process
  - We will start and end on time
  - We will manage the conversation to ensure we get through the material
  - We will help you interact with respect
- Interact with Respect
  - We will value your insights and knowledge
  - We will ask permission to table conversations or alter direction
  - We will not force you to participate
  - We, too, will maintain our sense of humor
## Workshop Scope

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Our Bias

➢ Improvement shouldn’t happen in a vacuum
➢ Improvement shouldn’t be adhoc in nature
➢ Process improvement & projects go hand-in-hand
➢ Project managers, business analysts, team leaders, and others could benefit from improved facilitation skills
➢ Technology is a process enabler, not the process
Collaborative Process Improvement

Opportunities for:
- Information Exchange
- Discussion and Debate
- Creative Exploration
- Review and Validation

Continuous Process Improvement

Need for Change Identified

Set the Scope & Context of Change

Analyze the Processes

Identify Improvement Opportunities

Select Improvements

Launch Improvement Projects

Evaluate Performance

Opportunities for:
- Information Exchange
- Discussion and Debate
- Creative Exploration
- Review and Validation
What’s a Work Session?

A series of highly structured “meetings” intended to produce specific improvement deliverables.

- Usually longer than a regular meeting
- Best led by a capable facilitator
- Has cross-organizational participation

A TEAM WITH A SHARED VISION & PURPOSE

A NEW OR IMPROVED PROCESS DESIGN including:
- Roles & Responsibilities
- Metrics
- High-level Technology Requirements
Part 1

Productive Meeting Practices
YOUR TURN

- Facilitate a discussion at your table around the following questions.
  - Do you feel the time you spend in meetings is on average valuable or a waste?
  - If valuable, come to agreement on 3 factors you believe contribute most to making them productive.
  - If a waste, come to agreement on 3 situations or behaviors that cause them to be less productive than they could be.

- Document the key agreements on a flipchart.
Voice of the Customer

- 55% of meetings are dominated by one or two people
- 32% of people feel they could get fired for speaking the truth in a meeting
- 39% of decisions are made once the meeting is over
- 80% of the discussion is about things people already agree on

Source: 2004 survey commissioned by IMS (Interactive Meeting Solutions, Inc.)
Root Cause Analysis

Causes of Meeting Ineffectiveness

- Lack of Effective Meeting Controls
  - Going Off on Tangents
  - Multi-tasking During Meeting
  - Side-bar Conversations
  - Late Arrivals
  - Dominating Participants

- Solve this by...
  - Having the Right Facilitator
  - Applying Meeting Management Techniques

Lack of Effective Meeting Controls 49%
Incorrect or Inadequate Attendance 32%
Poor Preparation 14%
Other 5%

Source: 2006 Resource Alliance Survey
What is a Work Session Facilitator?

Responsible for the end-to-end Work Session process

- Define session objectives*
- Identify required deliverables*
- Determine meeting approach*
- Determine decision-making process*
- Clarify roles/responsibilities*
- Identify participants*
- Set date, time & location*
- Develop agenda*
- Send invitation and agenda
- Create meeting materials*
- Prepare participants*
- Confirm meeting logistics and required technology
- Send meeting materials
- Confirm attendance
- Arrive early to make certain all is ready

- Welcome
- Confirm objectives and agenda
- Introduce participants
- Review meeting ground rules
- Handout meeting materials
- Perform the "work" of the meeting - Lead meeting dialogue - Create deliverables - Confirm decisions - Confirm action items/owners/due dates - Validate meeting decisions and outcomes - Gain agreement on next steps

- Backup all meeting documentation
- Review deliverables with sponsor and/or project manager
- Obtain meeting feedback
- Distribute meeting deliverables to attendees and other appropriate recipients
- Incorporate "next steps" into project plan*
- Incorporate the meeting outcomes into the project plan*
- Continue followup on open issues and action items*
- Manage deliverable updates/revisions*

* Items noted with an asterisk are typically performed in conjunction with the project manager. If the project meeting facilitator is also the project manager, then the same person is playing two roles with respect to meeting facilitation.
Facilitator Core Competencies

A good facilitator for process improvement must be able to:

- See the bigger “improvement” picture
- Understand what models & outcomes are necessary along the way
- Collaboratively facilitate those models
- Work with Execs & SME’s
- Create a collaborative environment
- Multi-task
- Serve as an objective process guide
- Manage passionate group dynamics
- Be self-aware

Additional Facilitation Resources:
- National Facilitators Database - www.nfd.com
- International Association of Facilitators “Find a Facilitator” – www.iaf-world.org
Playing Two Roles—Expert & Facilitator

If you can...
- Remain objective about the issues being discussed during the meeting.
- Allow the team to make decisions that are contrary to your opinion.
- Use your knowledge to ask questions rather than suggest solutions.
- Manage the group dynamics and politics without fear of reprisal to your career.
- Guide rather than dictate.
- Handle challenges to the process and/or agenda without taking it personally.
- Not lose sight of the meeting process when contributing to discussion
- Lead the team in required modeling, diagramming, or analysis techniques.

And the team can...
- View you as unbiased or objective regarding the outcome.
- Allow you to play the role of process guide rather than just content expert.
- Give you the same respect they would an external consultant.
Apply Meeting Management Techniques

Ways to...

- Keep the team on topic
- Aid in managing momentum and group dynamics
- Assist in assuring clear, unambiguous communications
- Aid in making objective decisions

I had an agenda and an objective, but somehow things got off track?

They can talk a topic to death. How do I get them to either make a decision or move on?

I thought we had agreement but now it sounds like we’re talking about different things?
Clarifying Communication

**Scope Table or Frame**
A technique for clarifying the boundaries of the project or meeting.

Use it to:
- Identify political or organizational boundary issues
- Provide a first-cut at stakeholder / team identification
- Limit conversation or guide discussion throughout the meeting

<table>
<thead>
<tr>
<th>In Scope</th>
<th>Out of Scope</th>
<th>Pending Discussion</th>
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**Glossary**
A record of definitions for terms, acronyms and phrases used during the meeting.

- Add to the list throughout the project.
- Attach the Glossary to documentation to clarify intentions and meanings for those not in the meeting.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
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<tbody>
<tr>
<td>Decision Rules</td>
<td>Criteria or processes used to govern the process of decision making.</td>
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<tr>
<td>Goal</td>
<td>An aim or intended result of a strategy, used interchangeably with objective. A broad statement describing a desired future condition or achievement without being specific about how much and when. Often begins with the preposition &quot;To...&quot;</td>
</tr>
<tr>
<td>Objective</td>
<td>Used interchangeably with the term &quot;Goal&quot;.</td>
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<tr>
<td>Step</td>
<td>A single activity that must occur in a process or procedure.</td>
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<tr>
<td>Strategy</td>
<td>A long term plan of action designed to achieve a particular goal.</td>
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Clarifying Communication

Paraphrasing
- Restating someone’s comment in your own words.

Summarizing
- Identifying the “themes” of conversation and defining their current state.

Drawing People Out
- Asking questions to elicit additional insight, clarity or information.
  - Can you say more about that?
  - What do you mean by...?
  - What’s coming up for you now?
  - Can you give me an example?
  - What’s important to you about that?

Keeping On Topic

Objectives

- The stated goal or purpose of the meeting.
- Use them as a measuring stick for every conversation to see if it has value.
  - Ask the team how the conversation is relevant to the objective
  - If it’s not, ask if there’s anything that should be captured for future discussion

Meeting Objectives

- We’re here today to...
  - Understand the current process for shipping products ordered online
  - Identify potential areas of improvement
Keeping On Topic

Agenda*

- The high-level activities that will get you to the objectives.
  - Use it as a checklist for progress.
  - Use it to postpone conversations that need to happen later in the Agenda.

*Template available on www.facilitatingprojects.com
Managing Momentum

**Ground Rules**
These rules set the stage for how the team will interact during the meeting. They enable reminders when the group loses focus or needs to be re-grounded in acceptable behaviors.

*Template available on [www.facilitatingprojects.com](http://www.facilitatingprojects.com)

**Time-Boxing**
Use this technique when the team can’t seem to reach closure on a topic or decision.

- Announce that the group has X more minutes of discussion before they need to make a decision.
- If a decision cannot be reached, assign an action item and move on.
Managing Momentum

Parking Lot
A temporary storage place for ideas, concepts, desires, and thoughts that are tangential to the objectives of the meeting.

- Ensures items “don’t get lost”
- Enables them to re-surface at the appropriate time
- Include them in Action Item List for follow up

<table>
<thead>
<tr>
<th>#</th>
<th>Parking Lot Item</th>
<th>Contributor Name</th>
<th>Plan for this Item</th>
<th>Status</th>
<th>Comments</th>
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Managing Momentum

**Action Items**

Capture an Action Item when…

- A decision can't be made without additional information.
- More thought or work is required to finish a task.
- Additional people (who are not currently available) are needed to give input or validate information.

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*Template available on [www.facilitatingprojects.com](http://www.facilitatingprojects.com)
YOUR TURN

- Take a moment to think about a project you're working on or will be working on in the near future.
  - Which of the 11 techniques we've discussed will be of most value to you and why?
  - What will be your biggest challenge in implementing this technique?

- Have a facilitated discussion of your insights with the others at your table.
  - FACILITATOR
    - Determine how you'd like to structure sharing (i.e., round the table, speaker hand-off, etc.)
    - Time box each interaction so everyone has time to share and get feedback on their thoughts.
    - Consciously use Paraphrasing, Summarizing and Drawing Out techniques as appropriate.

- You have 20 minutes.
Help the Group Make Decisions

- Get clarity ahead of time about...
  - What decisions are vital to the meeting?
  - Is the result a decision or a recommendation?
  - What decision-making method will be used?
  - What process will be used if the group cannot come to a decision?

"We can try to avoid making choices by doing nothing, but even that is a decision."
- ThinkExist.com Quotations. Gary Collins
Techniques to Aid in Decision-Making

WARNING: These techniques won't make the decision but will aid in reducing emotion and helping the group objectively assess their ideas

Decision-Aiding Techniques:
- Pros / Cons list
- Force Field Analysis*
- 9-block Diagram*
- Impact Matrix (Decision Matrix, Pugh Matrix)
- Gradients of Agreement

*Templates available on www.facilitatingprojects.com

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Lessons Learned about Process Improvement Work Sessions

**DO:**
- Start with clear objectives and targets
- Involve those who know, those who are impacted, and those who'll support the development and implementation
- Understand the purpose, boundaries and goals of the process before attempting improvement.
- Select improvement opportunities carefully – focused vs. shotgun approach
- Consider multi-generational implementation

**DON'T:**
- Map the “to be” process until you understand the current problems and future goals of the process.
- Assume that the “real” process matches the written procedures.
- Assume that the causes you identify are really the “root”. Back up your assumptions with data.
- Change team members mid-process or you’ll have to back-track.
- Try to implement all the changes – be selective.
- Allow pre-mature discussions around solutions or supporting technology.
Is Facilitation Necessary?

“You can do a project without facilitation. But, you can also cut your own hair, do your own dentistry…

it just takes longer, is more painful, and you probably won’t get the best results.”

Mary Wayne Bush,
Organization Change Specialist
Lockheed Martin Corporation’s
Space Systems Company
Part 2

Facilitative Modeling

[Diagram]

[Diagram]

[Diagram]
Before You Model...

- Know the *purpose* and capabilities of the model
- Know the *conventions* of the model
- Understand how the model *contributes to objectives*
- Understand the output of the model and *how it will be used*
- Choose an appropriate *level of detail* to accomplish the objectives at hand
- Create “draft models” or “seed materials” if appropriate
- Recognize your own “J-Curve”
The “J-Curve” Effect

Introduction of any new concept, organization, method, technique, technology or tool results in a **loss of productivity** as people work through the learning curve.

Once through the learning curve, **productivity typically increases rapidly.**
Process Decomposition

Sometimes you can’t see the forest for the trees. Decomposition allows you to see both – forest and trees.

Book Chapter 29
Identify the Business Processes

- **Process Decomposition**
  - A way of understanding and visually representing the components of a process so you can easily understand what’s involved
  - Does not indicate “how”, “when”, or “where”

- **Best Used To:**
  - Communicate scope
  - Provide a “road map” for large or complex initiatives
  - Assist in depicting where resources fit into the overall picture
  - Give structure to what can be mentally overwhelming
  - Help people to focus
What Does The Model Look Like?

CONVENTIONS

- Always maintain consistency with the defined area of scope
- Keep detail within a level consistent.
- The sum of the parts = the whole
- Ensure that items are non-redundant
- Use Verb-Object phrases, especially on Level 2 and below
- Structure is typically tree-like (hierarchical).
Process Decomposition

Compensation Planning and Delivery
Project Scope and Roadmap

SAMPLE

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How To Facilitate It…

1. Put the name of the process in a large Post-it, and place it on a wall (rather high up, since you'll be building out the decomp structure below it.

2. Ask for a description of the process.

3. Describe the next part of the activity as…
   - Breaking down the components of the process area / scope of the initiative
   - We are looking for the 5-to-7 things (sub-processes, “chunks of work”) that comprise the process
   - We will continue breaking down each Sub-process (chunk) into it's 3-to-5 sub-processes, etc. etc.
   - U.S. Map Example
4. Guide the group in brainstorming possible Level 2 sub-processes
   ➢ Add Sticky notes for each sub-process on the wall (no specific order)

5. Review each item and confirm whether it’s a Level 2 or Level 3 sub-process
   ➢ Arrange Sticky note either beside (Level 2) or under (Level 3) the appropriate sub-process

6. Confirm that the Level 2 sub-processes fully encompass the process.

7. Repeat for Level 3.
YOUR TURN
Practice the Technique

- Facilitate further development of one branch of the “Acquiring New Talent for the Company” decomposition.
  - Get agreement on the branch to further decompose
  - Identify Level 2 sub-processes
  - Use paraphrasing, ask others to help capture, anything that makes your facilitation process better

- You will have 20 minutes. Feel free to ask questions as you go.

- Be prepared to share your learning’s with the group.
Collaborative Process Improvement

Use Decomp to:
• Define the scope of improvement analysis
• Identify the business processes within scope
• Serve as a framework for process mapping

Continuous Process Improvement

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Lessons Learned
about Facilitating Process Decomp

**DO:**
- Allow the group time to brainstorm and analyze
- Reinforce that items are non-redundant
- Keep items at the “same level of detail” within a level of the hierarchy
- Ensure that each set of “chunks” is sufficient to describe the item above

**DON'T:**
- Get “hung up” on sequence when laying out the Post-it Notes
- Let the discussion focus on “how”, “when” or “where” the work gets done… this is only structure!
Process Mapping

*Understanding how it works and who does it*

Book Chapters 30 & 31
Mapping the Process

**What is it?**
- A visual picture of “how” a process works
- Describes the “sequence” of processing
- May be further annotated to show discrete or cumulative costs, time, and “who” does the work

**Best Used When:**
- When you’re changing the way people do their work (i.e., adding automation)
- When you’re combining entities that have differing approaches (i.e., mergers, acquisitions, reorganizations) and want a standard “blueprint”
- When you’re introducing new or revising old products or services and need to understand the resulting impacts to people, tasks, and technologies
- When you’re attempting to reduce waste, improve efficiency or reduce costs (i.e. quality initiatives)
What Does The Model Look Like?

CONVENTIONS

- Map left-to-right in time.
- Stack symbols vertically when they occur in approximately the same period of time.
- Use verb-object phrases to name the process steps.
- Annotate process maps to enhance understanding.
- Number process steps (when map is stabilized)
Use Your Decomp

When you're mapping ...

- Level 0 is the major business process
- Level 1 is major steps – no decisions
- Level 2 includes major decisions
- Level 3 more detailed with decision points, deliverables, and perhaps timing
- Level 4 may be procedures and may not be necessary for every process
Standard Mapping Symbols

- Stick with the standard symbols to ensure clarity
- Feel free to set off areas within dotted boxes or use color to emphasize or communicate
- Create a legend on your map to document anything unusual
How To Facilitate It...

Define the Boundaries

1. Write the process name on a flip chart
2. Write either “current” (as is) or “target” (future state)
3. Determine whether this process has alternate views and which one you’ll map
   - Online vs. In Person, In US vs. In Europe, Individually vs. In Bulk
4. Create a concise description of the purpose of the process
5. Identify the start and end points
   - “What triggers the process to start?”
   - “How do we know when it’s done?”
6. Document the process inputs & outputs
   - What’s used in and produced by the process (this is iterative)
YOUR TURN
Set the Boundaries

Each year your division holds an annual get-together to discuss the highlights of the year, announce the next year’s goals, and build the team. Each year someone new heads up the planning process and, as a result, each year things slip through the cracks. You’ve been asked to create a repeatable process that can be reused every year.

- You have 10 minutes to work with the person next to you and set the boundaries of the process.
How to Facilitate It, cont’d

Map the Process

7. Identify initial process steps
   - Use nominal group, facilitated discussion, free form brainstorming, or other techniques
   - Don’t be overly concerned about sequence at this point… just get some of the steps identified

8. “Work the map”
   - Start to organize the steps in sequence while asking about key decision points, etc.

9. Review “segments” of the map – looking for consistency of detail and completeness

10. When the map is deemed “complete”, overlay with roles to understand “who” does the work

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How to Facilitate It, cont’d

10. Walkthrough the map one more time using an actual business scenario to validate it
    - If working an “ideal process”, check for contribution to targets, objectives, and CTQs
    - If working a “current process”, begin to highlight the process steps (areas of the process) that are contributing to the problem

11. Optional: Insert “measurement activities” at the point where key performance indicators would be captured or known
At this point it may look something like ...
YOUR TURN
Map the Process

Continuing the conference scenario...

- Take the next 15-20 minutes to work with the person next to you and draw out the process. Don’t forget...
  - Keep the tasks at relatively the same level of detail
  - Phrase in verb-object statement (i.e., brush teeth, schedule meeting, define requirements, etc.)

- We’ll debrief as a group at the end of the activity.
How to Facilitate It, cont’d

Document the Process

12. Transcribe wall map into desktop flowcharting tool.
   - This can be done at intervals so that the team can “see it in print”
   - Additional changes can be made real-time via projecting your flowchart and updating electronically. But don’t attempt this unless you’re extremely comfortable using the software. Do not make the team wait for you.
   - If a scribe or co-facilitator is available, capture Process Detail Table information in the background.
Why Bother with Swimlaning?

- Consider this process map sample…
  - How many job roles participate in this process?
  - Also… what do you notice about “verb-object” phrasing?

```
Process Mapping

Why Bother with Swimlaning?

1. Consider this process map sample…
   - How many job roles participate in this process?
   - Also… what do you notice about “verb-object” phrasing?

2. Process Mapping Diagram

   - Purchasing sends Purchase Order to Vendor
   - Purchasing sends Purchase Order copy to Accounts Payable
   - Goods are received in Receiving
   - Receiving document is sent to AP
   - Vendor sends invoice
   - Invoice received in AP
   - Do all documents match?
   - Send payment to Vendor
   - Reconcile PO, Receiving Doc, and Invoice

```

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Collaborative Process Improvement

Use Mapping to:
- Understand and document “As is” business processes and associated baseline measures
- Identify areas of concern or opportunity
- Reflect “Target” business processes which incorporate improvements
- Establish key performance indicators to support targets
- Continue improving

Continuous Process Improvement
Lessons Learned
about Facilitating Process Mapping

**DO:**
- Level set the team that reaching a comfort level with completeness will take multiple sessions.
- Understand the purpose and boundaries of the process before mapping.
- Map at the level of detail needed to control variability.
- Review and feedback “segment by segment” as the map is being built.
- Know who will “own” the process maps.
- Store all process-related information in an accessible repository.

**DON’T:**
- Get “hung up” on exact sequence of steps too early in the discussion.
- Change team members mid-mapping or you will be re-mapping the process.
- Leave “maps” as sticky notes on a wall. Transcribe it into tools that are readily available within the organization so it can be easily updated when needed.
- Number the steps of the process map until you have reached a stable state.
Thanks for Your Participation

For additional information feel free to contact:

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For more info, check out our book & website…

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"The Project Meeting Facilitator" coming in October, 2007