A close up of a sign

Description automatically generated

current state analysis

Guide for Stakeholder Participation

# logistics

Thank you for your participation in business process improvement for [PROCESS]. We will hold the Analysis of Current State session on [ADD DATE] from [START TIME] to [END TIME]. We will meet virtually at: [ADD VIRTUAL LOCATION LINK] or in person at: [ADD BLDG AND ROOM]

*Virtual tips:*

As we transition to a virtual process improvement environment, we recommend that each participant log in to our meeting on an individual laptop in a location that allows for clarity with audio and please enable your video, we want to see everyone if possible!

Conducting this session via Zoom may be difficult to anticipate when others will speak, so please be patient! A few features that we will use and monitor:

1. Chat feature
2. Raise your hand (click on “participants” and then you can raise your hand, or see who else has their hand raised)
3. Use “reactions” this will add a thumbs up or a clapping emoji to your video square for a brief time

\*link to Zoom tutorial

In addition to reviewing the current state map together, we will use a shared Google Doc during the session to enhance transparency and collaboration for collection analysis content. You can participate with this document during the session by opening this link: [ADD LINK].

# Purpose of Analysis session

During the current state mapping session, we defined what you do, how you do it, how often you do it, and who does the work. During the Analysis session, we will explore why you do the work in the way that you currently do it. We will foster a deep discussion to better understand the root causes of why we do the work in the way we do it. This will open up opportunities for change. We will gather pain points, opportunities for improvement (OFIs), areas of waste or inefficiency, and metrics or desired metrics.

# before our session

Review the current state map to become familiar with the format. We will use this map to drive our discussion.

Considering the process as a whole, begin to think about following:

* How many people/roles (swim lanes) are involved?
* How many times do we have to “restart” the process or “go back” for clarification, additional info, or error correction?
* How many hand-offs are observed? Do these hand-offs add-value?
* What tasks consume the greatest amount of time?
* Are there any “hang ups” or bottlenecks?
* Are there any missing or redundant reviews and/or approvals?
* Are there any quality issues?
* What is the “customer” experience during this process? *(This may vary depending on process – customer, employees, students, staff, etc.)*
* What complaints and /or compliments did “customers” deliver?
* What is the percentage of manual to automated tasks?

# duRIng session

We will start by discussing the process as a whole. Our observations from the current state mapping session and other things we have identified since our meeting.

We will then discuss the current state as “chunks” or groupings of work to narrow our discussion and allow us to dig deeper. Some examples of the questions we will use to guide the discussion are below:

* **Why does this activity exist? Is it a:** 
  + Necessary Business Function
  + Legal or Regulatory Requirement
  + Technical Limitation
  + Other: Have always done it this way or another reason, department silo, etc.
* **Does the activity add value\* to the customer or advance the process, or can it be:**
  + Eliminated or substituted or combined
  + Automated
  + Completed by someone else
* **What steps should be added to…** 
  + Improve communication
  + Prevent problems (e.g., if we add a step, it improves the process dramatically)
* **What steps should not be changed?** 
  + Best practice(s) already in place
  + Excellent feedback from customers
  + Provide high value to customers

**Other analysis questions we may touch on:**

* What data do you use, that is currently available, to track this process’s performance?
* What is the average cycle time?
* How do you measure quality? How should we?
* What do you measure customer satisfaction? How should we?

\*We will share information on how to determine if something adds value to a process

# After session

After the session, we will provide the spreadsheet of information we collected during our discussion. This will summarize all of the pain points, opportunities for improvement, metrics or performance measures we captured during the session and will guide us as we design the desired future state. To design the future state we will – how should work be done, or how would you want work to be done if we eliminate current state limitations.

Please review and let us know if we missed anything…(language from post meeting)

**Future State Mapping**

Date

Time

Location