A close up of a sign

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current state MAPPING FACILITATION GUIDE

# IN ADVANCE

* With the lead subject matter expert, determine team necessary for process review and secure proper level of cross-functional participation
* Refer to the event planning guide to track the following details:
  + Schedule meeting with appropriate room (projector, whiteboard, wall space, capacity); Make sure an Outlook meeting is sent to all participants
  + Publish agenda and send via e-mail at least 3 days in advance.
  + Prepare flipcharts /worksheets for the workshop, check supplies, including candy for the meeting
  + Paper (butcher), Flip Chart Paper, Scissors, Tape, Markers, Candy
* Gather and review existing documentation such as:
  + Current process maps or documents outlining important processes or procedures
  + Departmental/functional schedules or monthly checklists that identify key tasks and responsibilities in your processes
  + Documents used within the process
  + Relevant cost information, metrics, headcount, etc.
* Conduct one-on-one or roundtable meetings to answer these questions:
  + For each process, what triggers it? For example, is it a prospect phone call or response to a marketing campaign or an online application? Is it the receipt of a vendor invoice?
  + What ends the process?
  + What roles (positions within departments) are involved in the process? If colleagues in other departments are involved, use their role rather than their department name.
  + What purpose does this process serve?
  + What are the key steps in the process?
  + Are there any of these steps that are important internal controls?
  + What works well? Why? What does not work well? Why?
  + How many transactions flow through the process? Approximately how long does it take to complete the work?
  + Are there many different scenarios to the process? For example, what causes this process to be performed in a different manner?
  + What are the top 3 things about the process that you would like to change?

If you can spend a few minutes ahead of a process workshop going through these questions to help focus on the workshop agenda, the benefit to the process analysis is greatly enhanced.

# during the meeting – facilitation

Facilitator guides the participants through the following steps

* For the selected process:
  + Recap why we are doing this project
  + On a flip chart, before the meeting, define the Start, Stop and **Scenarios**
  + Summarize beginning and end of process and what is the purpose/objective of the process
  + Who are the “players” (ROLES) in the process
  + What triggers the process to begin (an event or triggering activity)
  + What happens next (and next, and next…)
  + Be sure to identify how handoffs occur (Email, Walk over, workflow/queues)
  + What concludes the process
  + Does the process trigger other processes?
  + Approximately how frequently is this performed (on a daily, weekly or monthly basis) and how long do the activities take
  + What cost, quality, service and speed issues exist?
* Wrap up: thank the participants for their time. Remind them that “this makes a difference”. If you’ll allow us and this project, this can help to build a legacy Then talk about next steps

# Facilitator Behavior:

* Find an opportunity to compliment the participants
* Cell Phones off/away (wear a watch for timekeeping or use documenter for time keeping)
* Be Enthusiastic – Engage participants
* ACQ (Ask Clarifying Questions)
* Write/Document Clearly
* Pace will be rapid – we will need to:
  + Arrive prepared
  + Avoid atomic level of definition
* Steer clear of Analysis Paralysis by:
  + Focusing on “Whales” versus “Minnows”
  + Focus on the Process, not the Players
  + Understand context – does this happen always, sometimes or once in a “blue moon”
  + Be aware of potential rabbit holes (use a flipchart parking lot)
* Embrace a spirit of team-based improvement - no “wrong” answers or suggestions
* Stay focused on how it works today
* Be aware of the scenarios/domains

# during the meeting – documentation

* Arrive 30 minutes early
* Help facilitator prepare the walls (add any needed prep information on the board)
* If a new stakeholder group, pull up the “Intro to BPI” PowerPoint presentation
* Open up a new or existing Visio As Is/Current State template (saved in Box Toolkit)
* Save your file at the beginning and save often!
* Communicate with your facilitator throughout the session (clarification of concepts, need for change of pace, prompt to assist with filling in the process, tracking time, etc.)
* Keep track of time. Let your facilitator know when there are 30 minutes left, 15 minutes, and 5 minutes (or other pre-arranged times).
* Before you leave the room:
  + Take pictures of the process maps and flip charts
  + **Tape Post its in place!! (if applicable)**
  + Roll up process maps and label for future retrieval. (if applicable)
    - Keep the process maps in good condition. You will use them again.
  + If you have a project space, leave the process maps up for comment and review.
* Determine roles for cleaning and finalizing maps for review with the facilitator.

# Documenter Behavior:

* Be welcoming and introduce yourself
* Cell Phones off/away (keep a way to track time for your facilitator throughout the session)
* Be Enthusiastic
* ACQ (Ask Clarifying Questions): be sure to communicate with your facilitator any needs during the session – clarification of concepts, need for change of pace, prompt to assist with filling in the process, tracking time, etc.
* Document in the proper Visio As Is / Current State template (in Box BPI Toolkit)
* Pace will be rapid – we will need to:
  + Arrive prepared (know what is in prior maps, have mouse, save file, do your homework!)
* Embrace a spirit of team-based improvement - no “wrong” answers or suggestions

# After session

* Before you leave the room:
  + Take pictures of the process maps and flip charts
  + **Tape Post its in place!!**
  + Roll up process maps and label for future retrieval.
    - Keep the process maps in good condition. You will use them again.
  + If you have a project space, leave the process maps up for comment and review.
* Immediately document and distribute meeting notes and action items; establish “due by” date for action items
* Close out action items including:
  + Collect remaining data
  + Follow up on open items
  + Amend worksheet as needed.
* Review metrics and the “self-evident” issues and determine how to go forward:
  + Keep as a “priority process” - continue to analysis stage
  + Reduce priority of process
  + Defer analysis or additional investigation to a later date.
* Email all participants thanking them for their time in the mapping session, remind them of the upcoming sessions and what to expect going forward.