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**Process Improvement**

**Kick-Off Meeting**

**facilitation Guide**

# about this guide

This guide is meant to help facilitate the discussion which will result in a thorough understanding of the project background, goals and stakeholders. This meeting format should be structured and respectful of everyone’s time, but also casual and friendly to build trust. **It's a conversation.** You are there to help the team realize their goals!

This guide is organized to align with the CCI Project Charter Template, with these questions feeding information into the relevant sections of the charter.

**Deliverables:** A completed Project Charter (may be finalized after the meeting)

# Introduction: High-Level Overview

When you meet with the project team, give them a brief explanation of the continuous improvement cycle. Here are some talking points:

* Plan > Do > Check > Act
  + **Plan:** Recognize an opportunity and plan a change
  + **Do:** Test the change. Carry out a small-scale study
  + **Check:** Review the test, analyze the results, and identify what you’ve learned
  + **Act:** Take action based on what you learned in the study step. If the change did not work, go through the cycle again with a different plan. If you were successful, incorporate what you learned from the test into wider changes. Use what you learned to plan new improvements, beginning the cycle again
* It is an iterative process that challenges processes, technology, norms and patterns.
* It is a process of forward-thinking action aimed to understand what is happening now in a process, why it is happening, and what is desired to happen in the future.
* It a process that follows a structured approach to define and analyze a predetermined scope of work to improve its performance.

# SECTION 1: Project Background

The project team meets to discuss the background, purpose, and context for the selected engagement.

Discussion questions:

* What is the **background** on how this became a project?
* What is the **problem** we are addressing with this project (what is the issue)?
* What are the **driving factors** for this change (why is this important)?
* Where relevant, indicate all internal departmental goals that this project supports.

# SECTION 2: Defining the Process Area

The project team meets to discuss the details of the process area being improved. At the completion of this phase, collect top pain points and limitations of the process/es.

Discussion questions:

* Generally, **what** work is being completed in this process?
* At a high level**, how** is this work being completed today? (High-level process steps)
  + What are the start and end steps in the process?
* **Who** is completing this work today?
* Who are the **internal and external customers**?
* What **versions** or **“flavors”** of this process exist today?
* Are there particular populations, products or services included?
* What are the biggest pain points present in the work today?

# SECTIOn 3: Defining Project Success

The project team meets to understand the key components of the project and defines metrics and measures for success, including understand the strengths, weaknesses, opportunities, and threats for the project. *Metrics to think about: lead time, cycle/touch time, error rate, customer satisfaction, employee satisfaction, backlog, work in progress, number of hand-offs, number of approvals, number of process steps, cost: freed capacity (FTE) or dollar savings.*

Discussion questions:

* What is the project team’s definition of success for this **project**?
  + How will you measure this success?
* What is the project team’s definition of success for any **business process improvement activities** related to this project?
  + How will you measure this success?
* What does success look like from the perspective of **internal and external customers**?
  + How will you measure this success?
* What does success look like from the perspective of **key institutional leaders**?
  + How will you measure this success?
* What does success look like from the perspective of **other groups or participants** in this project?
  + - How will you measure this success?

# SECTION 4: Organizational Context

The project team meets to understand the organizational context of the project works to understand the strengths, weaknesses, opportunities, and threats for the project.

Discussion questions:

* Who are the **key stakeholders** for this project, how will they be affected?
* Who holds most of the **information** about this project?
* Are there any **challenging** stakeholders?
* Are there any stakeholders that may need **special attention** during this project?
* Who are the project **cheerleaders/advocates**?
* What **positive or negative cultural issues** may we encounter?
* What conditions may limit the project’s/team’s options with respect to resources, personnel, or schedule?
* Does the project success depend on coordination of efforts between the project team and other individuals or groups? Has everyone involved agreed to this collaboration?
* What obstacles may cause the project to fail?

# SECTION 5: Next Steps

After relevant information from sections 1-4 above is gathered, confirm key roles, project charter, next steps, and project timeline that are aligned with the strategic objectives of the project and department.

Discussion questions:

* **Where** do we go from here?
* What will be the **major milestones** for this project?
  + Process Improvement Working Sessions
    - **Day 1**: 3 hour - Current State Business Process Mapping Workshop
      * Deliverable: current state process map
    - **Day 2**: 3 hour - Analysis of the Current State Business Process Workshop
      * Deliverable: excel document including current pain points and opportunities for improvement
    - **Day 3**: 3 hour - Future State Process Design Workshop
      * Deliverable: future state process map, recommended action plan, key functional requirements (for software selection projects)
    - **Day 4**: 1.5 hours – Implementation Plan Development
  + Scheduling Considerations:
    - No preparation needed from participants other than to come ready to talk about how they currently do work within the identified process area
    - Day 1, 2, and 3 do NOT have to be consecutive; however, we recommend that these sessions happen within two calendar weeks.
    - If there are many subprocesses, sometimes it is necessary to schedule more than one Current State Business Process Workshops. The information gathered in this meeting should provide enough context to identify if multiple sessions are needed.
* Communication strategy: specify how the project manager will communicate to the executive sponsor, project team members, stakeholders (eg; frequency of status reports, team meetings, means of communication etc…)

# RESOURCES FOR FACILITATORS

* Project charter template (link)
* Meeting Agenda Template (link)