ENGAGE PROCESS

Whitepaper

Seven steps of a great Process exploration workshop

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Process workshops are vital for any organisation to successfully change. Not only as a one off exercise in mapping, but as a means to continuously improve work done in an organization. Working with teams to generate accurate process maps and ideas for improvements, which can be iterated on multiple times.

These process workshops should form the backbone of your improvement agenda. By engaging team members and getting honest feedback and critical insight into how work is conducted; small changes can then be put into place. These small changes will generate goodwill and a willingness to further improve.

This whitepaper will provide seven key steps to run effective workshops. These methods can be applied without the use of Engage Process, but this whitepaper explains the theory underpinning this tool.

Workshop from home

A process workshop can be easily executed remotely. At the end of this whitepaper you'll find extra tips in case you have to do a remote workshop.

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Contents

Organizing the workshop

Select a process that really matters

Begin with a process that is customer facing, and the benefits can be clearly recognized.

Always plan the process workshop at the beginning of the improvement path

As soon as a team has discussed its processes in a workshop, this serves as an outline for all further discussions about organization, systems, compliance issues, and so on. By all means, don't first talk formonths on end about all sorts of aspects at the individual level. If you do that, the subsequent process will lack a common reference framework.

Set up a brainstorming space

If the brainstorm is conducted in a meeting room, then make it informal. Make sure that the team can get close to the board or screen that will be used for the discussion.

Provide a large board or screen when using a digital tool

A projector can often be used to display a large picture. A 'large TV' is often too small to represent a comprehensive process well and then make it open to discussion.

Have two people lead the workshop

Often four fields of expertise come together during a session: workshop facilitation, process management, domain knowledge and the operation of any tools. If it goes well – and that is often the case right away – then one person can no longer handle all these activities well.

Note: The workshop advisors must themselves not have too much domain knowledge. The content of the discussion must come from the participants.

Set a maximum of 8 to 12 participants

Ensure that all roles within the process, from beginning to end, are directly represented. Direct – so not via the managers but by those who actually carry out the process. Pay attention that there are not too many staff members, not even from IT. Otherwise, employees can feel that they are being watched.

Organize the first session for a time period of 3 to 4 hours

This provides sufficient time for an initial inventory of the process.
Any longer than this can make it difficult for groups to focus.

Let the owner of the process do the kickoff

Explain why the process can be better, what can be better and how. Also, make it clear that the team has the mandate to identify these improvements and to enact them. What does the process owner expect of everyone and provide clear roles and responsibilities for everyone. Try to make the link between the improvement objectives of the process and the general strategy or position of the organization.

Ask a participating manager, if present, to limit him or herself to the main steps

Show respect for the knowledge that the team has about the detail steps.

Always start from the current situation: the IST or the AS IS

Do this even when you want to map a new situation. Place the current situation first, so the team can better experience the existing divisions of tasks, bottlenecks, etc.

First workshop: Drawing the current situations

The team is present. The projector is on or the brown paper is hanging on the wall. What's next? Start with the most obvious. Draw the process with each other, step by step.

Describe WHAT happens

Use simple language and active form and make it immediately visible as a process step.
Use a verb and a noun. So: 'customer call' or 'call the customer'. Keep the initial description concise. So, don't describe HOW the task will be done.

Always directly link a role to the activity

Make sure the role most relevant to the step is telling the story.

- How long do you take? Make note of the experience with the processing time.
- How often does this occur? Note the frequency.
- At which moment? Note whether the action occurs the same day as the previous step, or a day later, or X times per week.

The discussion of this processing time, frequency and moment are important for two reasons:

1) It increases the perception of this process step as well as the entire process

2) Later these values can be used to help calculate various measures.

Spontaneous and first reaction data is good enough to build a picture. This serves as a starting point which can be refined later.

Do not use existing process descriptions

These process descriptions are often made by department staff and lack the detail level of the work floor.

Focus on role changes

A lot of hidden work can take place when there are role changes. Be aware of how often this happens.

Make waiting times separately visible

If a participant indicates that his/her task begins the following day, then show a waiting time of 1 day. The lead time for many processes is namely determined for a large part by waiting for the transfer from one person to the next. By making it visible, you give the team a handle on shortening the lead times without anyone having to work harder.

Map exceptions

Does the described situation always happen? If not, then map what does happen and how often. Discussion of the exceptions is an important element. That's because the sum of the exceptions is often greater than the 'clean case'. Many exceptions in company processes run through the entire normal process plus a couple of extra steps. And because they are exceptions, they require extra steps and more energy than 'regular' process steps. They disturb the rhythm, they stand still longer, etc. In short, if we want to improve company processes, then it's precisely the exceptions that are fascinating!

Split into 'good' and 'not good'

Approval is a split. Many processes have one or more checks or approvals. That actually means that there is always a 'not good' branch. Don't forget to make this split visible and to indicate what percentage fall-out we're talking about here, so what goes to the 'not good' branch.

Note simple empirical data

It is not necessary to use scientifically correct figures. When this is the case, you can always refine the numbers later.

Don't write down too many details

Especially with the focus in recent years on IT systems, we have the tendency to note input, output, names of the IT systems, documents, etc. This level of detail is not needed initially and can always be added later.

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Note whether a step adds value for the customer

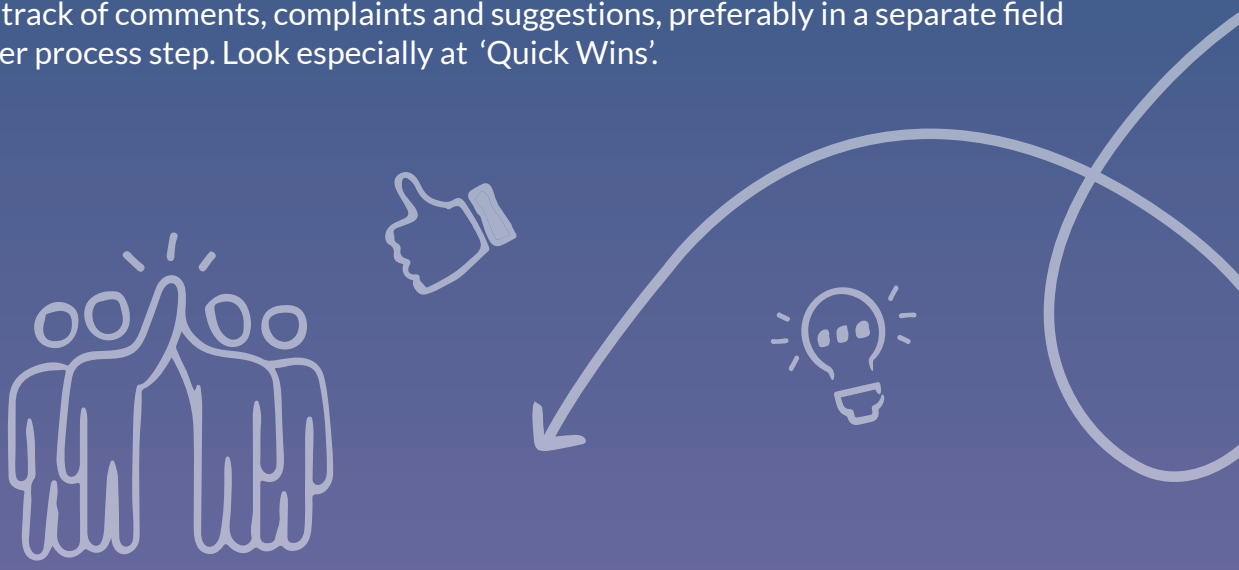
If the step is not value-adding, then this can be a good starting point for an improvement. Why do we do this? Many process steps have crept in over time and once had a good reason. Is that reason still good and valid?

Do not draw a swimlane but rather a value stream

Many of us learned to draw processes mainly in swimlanes. This indicates how the process runs from department to department. But these swimlanes actually emphasize the sense of department and often make the discussion too complex for a workshop. Keep it simple and focused on the customer. Go through the process as the customer experiences it, independent of the departments that are involved. You can always look at swimlanes later, per department, per location, per IT system and so on.

Note suggestions

Keep track of comments, complaints and suggestions, preferably in a separate field and per process step. Look especially at 'Quick Wins'.



Post workshop

In the first process workshop, all information is collected and the IST is created in about 3 to 4 hours. If team members are discussing a process for the first time, then organize a follow-up session after 3 or 4 days.

In the meantime, the team members will do a reality check. They will pay attention to, for example, the frequencies of processing time, realize that there are more exceptions, and so on, without this requiring much extra work. It provides great new insights for the follow-up session.

The second session: insight into the process

In the second session, the team works on improving their insight. This is done based on the information obtained in the first session. More experienced teams can already develop insights into the processes directly at the end of the first session.

Look at the statistics
How many activities, how many role changes, how many splits, how many roles are there in the process?

Look at it from various angles
Is it possible to tilt the process? Look now in swimlanes: swimlanes per location, per IT system, per input and output, etc. Do we get new insights, more bottlenecks, more Quick Wins?

Calculate
What is the lead time for the customer and how much time do we put into that period ourselves? This can be confrontational. Processes definitely don't always have to be performed immediately, but by shortening the lead time, there are almost always great advantages to be had.

Summarize Quick Wins
Look at the list of Quick Wins and try to judge these based on impact and feasibility. Which Quick Win does the team embrace the most?

Publish all the work
Don't let anyone go home empty-handed. There is nothing worse than a workshop where, a few weeks later, the participants wonder what was achieved. Work preferably with a tool that allows the team to use it for modeling as well as take away the results in exactly that format. The transfer from brown paper to, for example, a Visio or PowerPoint slide will unmistakably lead to a lower sense of ownership for the participants.

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Discussion about general improvement methods

After mapping the current situation, it can be handy to brainstorm with the same group about improvement methods. Concepts such as shortening lead times, performing actions in parallel, auditing the source, removing steps that don't add value, combining or eliminating tasks, standardizing, reducing batch sizes, etc. A simulation can be very helpful here. Perhaps some members of the team, often internal staff members, have already had experience with improvement concepts and trainings but the ideas and their advantages are not easily recognized by all team members. The discussion of these concepts is thus important to increase the acceptance and involvement of the team.

Improvements from within or from an advisor?

The best suggestions come from within, from the subject matter experts (those who do the process as their day job) .The trained advisors often quickly see lots of improvement possibilities. But they must not mention these! The acceptance and practical applicability of ideas are much greater when they come from the team itself. And after all, it's not about how many ideas you can collect in the first step; it's about continual improvement in the long term. So, try to explain improvement concepts to the team members and see which ones they find suitable to the written process.

Design of the desired situation

Improve the current situation or start with a clean slate?
There is much to say for both methods. The great advantage in the improvement of the current situation is that, in so doing, the team makes a step toward continual improvement. Look critically together at what you were doing and try to find small improvement steps. This is often very achievable. By contrast, the design of a completely new process often requires much more preparatory work.

Look at all Quick Wins and other improvement concepts discussed
Look at the list from the first workshops and hang the list on the wall. Also hang up the list of general improvement concepts.

Introduce improvements step by step and calculate them directly
See what the impact of a specific improvement is on the process model. Naturally, we focus here especially on the objectives that were mentioned at the kickoff by the process owner.

The implementation begins after the workshops

It is important for teams to know and feel that they have not done their work for no reason. The goal of a process workshop must not be limited to the documentation of a process. It is mainly about what we can do with it in practice, and the motivation of teams to put their own suggestions into place is often significant!

Select a number of improvements and implement them

Don't spend too much time on finding improvements. It is recommended to identify a few that can be realized in the short term. Discuss the implementation and ask permission to introduce these improvements.

Publish all the work, again

The same is true in each phase of the improvement cycle: keep people involved and ensure that they take all information with them to the workplace.

Finally, celebrate success

Reflect on the fact that, with teamwork, you have found improvement methods in a short period of time!

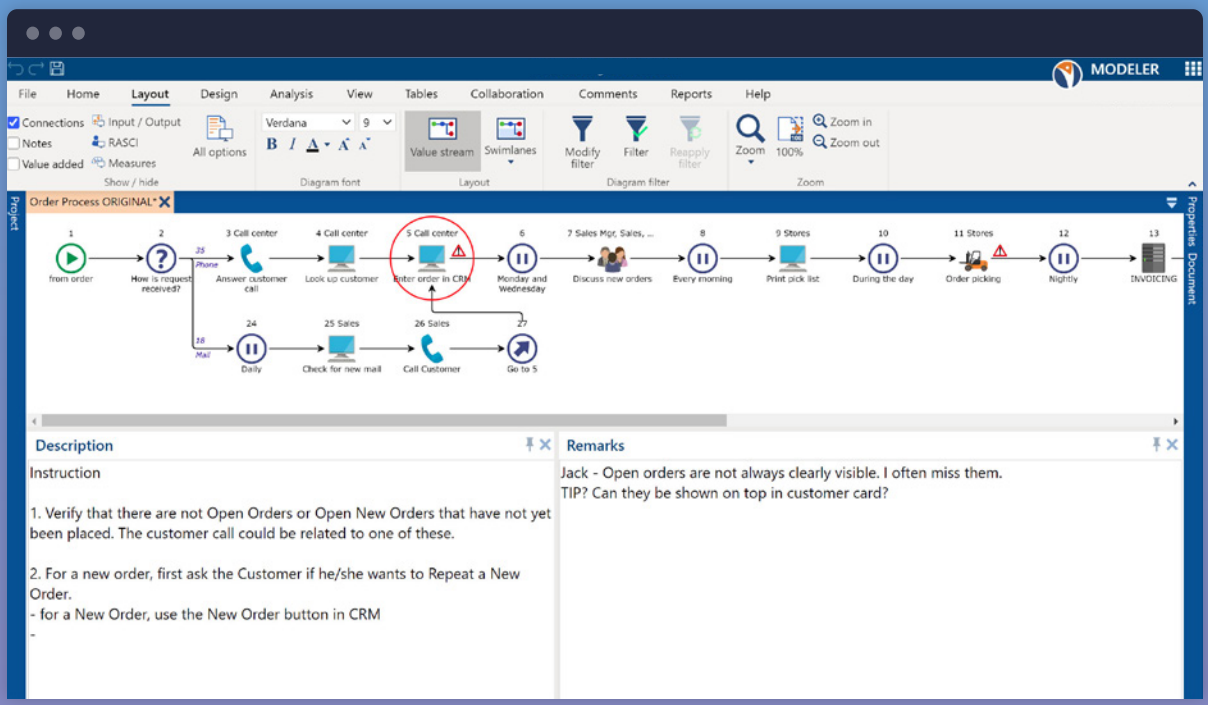
Successful process workshops are those where teams can easily view the work they've done and understand tangible improvements they have devised.

Bonus: Tips for a succesful remote process workshop

Our Modeler is well suited for remote process workshops where participants are not all gathered in one room. You need to use a video conference application like Zoom or Microsoft Teams in addition to the Modeler.

Layout of the Modeler workspace

To get the participants optimally involved in the workshop you have to use a scaled back screen. You only show the panels that are essential: Process steps, Process window, Description field and Remarks field. Also use the 'Full Screen' mode (F11) to hide the browser that you are using. See the example:



Next, you use the field 'Description' to highlight, only if needed, in a few sentences what is done in this specific process step. The use of the 'Remarks' field is very important! Even more so than during a boardroom- workshop. Here you take note of any suggestion, comment and/or critical issue made by participants. Start the comment with listing the name of the participant. You show their participation and make it personal!

Preparation of the remote workshop

Organize the remote meeting and invite a maximum of 1 participant for each role in the process. You can use the brainstorm module and Engage Brainstorm App of the Modeler to gather information beforehand. For example, you can ask for which process steps the process has or which roles are involved in executing the process. This helps to build involvement. You can also do a brainstorm between the workshop in which you've mapped the "As Is" and the workshop in which you're going to map the "To Be" situation of the process. Between these workshops you can collect current bottlenecks, but also improvement suggestions.

The Workshop itself

The remote process workshop should also be done by 2 people. One person to use the Modeler and one as host of the meeting. The host needs to monitor the chat function, and decides who is talking.

Start the session with all cameras active.
Participants can see who is there!

Let the participants do the talking. They can indicate via the chat if they want to contribute.

Use the cameras at the end of the meeting again to share team conclusions and waving good-bye.

The next step

After the meeting you share the process to the Engage Process Viewer. Participants can study the process and use the Feedback function to give input. Always organize a 2nd session to finalize the model and to inventory what needs to be done to get the new process/service going.

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Get in touch with us

Interested to learn how Engage Process can support you in your process management activities, such as process workshops?

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About Engage Process

Engage Process empowers staff to discuss, evaluate and improve processes together. Putting the employee first makes Engage Process a true “human centric” solution. This means proactively exploring and reimagining processes in real time, by the people who are actively working with these processes day-to-day. Processes create the foundation for management programmes such as cost savings, compliance, service (re)design, and digital transformation.

Over 300 organisations in Europe and North America use Engage Process on a daily basis. These include City of Edinburgh Council, Sedgemoor District Council, Brunel, City of Brugge, Firmenich, and Leeds Federated Housing Association, as well as many others in different industries.

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