

Planning and Facilitating a Process Mapping Meeting

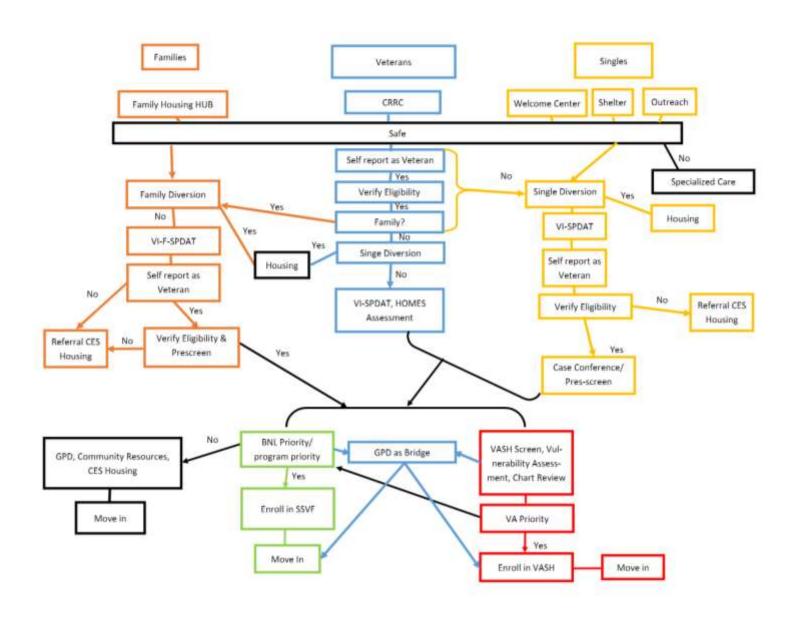
PRE-V	VORK	(https://theprocessconsultant.com/process-mapping/)		
	Pick the Program/system area: Using data and other information, pick the program or			
	resour	ce with the most significant bottlenecks or areas for potential improvement.		
	Identify the Perspective and Users:			
		Identify WHO – from which perspective are you looking to improve the system - the process administrators or the process users? Will likely want to do both but need to be separate mapping exercises. Also consider from different population perspectives if it impacts the process (e.g. youth, family, single, women, Indigenous).		
		Select the people that are most familiar with the current program or resource who will prototype an improvement plan from that perspective.		
	Pick a	Pick a Facilitator: Don't try to facilitate and participate!		
	time in	ogistics + Materials: Don't underestimate the importance of a good working space. Spend me inventorying the materials and technology you will need (suggest starting with hiteboard/butcher paper/sticky notes before putting in computer format). Lay out a plan or sending "Save the Dates" and invitations.		
		et the Data: Identify the data sources to understand the "NOW" and prepare to measure aprovements		
	Get Do	Documents: Where possible, begin to collect flyers, policies, intake documents etc.		
THE P	ROCES	SS MAPPING EVENT		
	Agend	a: SAMPLE (may do as Part 1 and Part 2)		
	PART 1			
		Identify the WHY you are undertaking to map your process (e.g. improve processes for users, common language and understanding for service providers, clarify processes, find and address bottlenecks, eliminate duplication, reduce the number of steps, house people faster, create a framework for data collection).		
		Identify the AIM (Objective) for the meeting (e.g., what are you trying to achieve – eg. faster housing move-ins and by when?)		
		Define the Process: Start and End		
		Identify the Measurement: How will you know a change is an improvement?		

February 22, 2019 1

		Map the CURRENT process and layer in current measures/data. Be sure to fully map before you start discussing improvement ideas. Use a "parking lot" to capture any ideas while mapping.	
		Collect associated documents related to the process.	
PART 2			
		Identify the Bottlenecks / Brainstorm Change Ideas / Select Ideas to Test to improve	
		toward an awesome FUTURE state.	
		Set Up the PDSA	
		Next Steps / Closing	
☐ Facilitation: Tips and Tricks			
		Where is the fun?	
		Where is the food?	
		What are your "Ground Rules" that establish culture and expectations for the meeting?	
		Where will you capture the visual map, the ideas you will test, and the PDSA cycle?	
IMPR	OVEM	ENT PROJECT MANAGEMENT	
	Identify the Improvement Project Manager - Designate who is holding the big red ball and will convene future meetings and drive the improvement team forward		
	Identify the Timeline: Decide when the improvement team will meet again (at what intervals and for how long) to evaluate and measure if the ideas being tested are resulting in process improvement.		
	Assure that Project Management includes continual data analysis to understand where to focus improvement efforts - when to stop doing something, when to modify the idea, when to scale and codify!		

February 22, 2019 2

Sample Process Map



February 22, 2019 3