

Planning and Facilitating a Process Mapping Meeting

PRE-WORK (<https://theprocessconsultant.com/process-mapping/>)

- Pick the Program/system area: Using data and other information, pick the program or resource 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 Facilitator: Don't try to facilitate and participate!
- Logistics + Materials: Don't underestimate the importance of a good working space. Spend time inventorying the materials and technology you will need (suggest starting with whiteboard/butcher paper/sticky notes before putting in computer format). Lay out a plan for sending “Save the Dates” and invitations.
- Get the Data: Identify the data sources to understand the “NOW” and prepare to measure improvements
- Get Documents: Where possible, begin to collect flyers, policies, intake documents etc.

THE PROCESS MAPPING EVENT

- Agenda: 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?

- 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?

IMPROVEMENT 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!

Sample Process Map

