

This document reviews the roles and responsibilities necessary to host a successful Process Triage® facilitated triage workshop. These instructions include a diagram for the room set up.

**These instructions are in addition to the Scope of Work statement developed with the executive host sponsor and the Process Triage® facilitator.**

## PARTICIPANT SELECTION CRITERIA

- Your principal participants should be workflow content experts. The best candidates perform their part of the workflow as a *primary job responsibility*, or be the designated expert for any technologies or supporting skills used in the workflow (e.g. IT systems or database requirements, financial reporting, legal reviews, etc.).
- There must be at least one subject matter expert representing each deliverable in the workflow; two are desired, as they will remember details the other might overlook.
- Consider including a representative customer or consumer (internal or external to the organization) of the workflow's final deliverables. They are in the best position to point out quality and user satisfaction issues and clarify *Moments of Truth*.
- Consider including the suppliers (internal or external to the organization) of the workflow's inputs, as they will be help with potential root cause narratives.
- Generally speaking, only designated experts are permitted to talk during the mapping phase. This is not the venue for training new staff. We discourage non-participant observers, as teams will discuss things that might be called "dirty laundry."
- Internal company facilitators are not allowed to attend unless Process Triage® is being compensated for training them. It takes several workshops for an otherwise qualified facilitator to master our methods. Contact us if you want us to train someone in-house.

## WORKFLOW EXPERT RESPONSIBILITIES

- Represent their view of the workflow regarding work, deliverables, descriptions, and any triage examination opinions.
- Abide by the firm's code of conduct, and any specific direction provided by the sponsor or facilitator.
- Speak the fact-based truth with impunity.
- Confirm their own understanding of the sponsor's vision and objectives if workshop progress strays off course.
- Reach out to non-attending experts as needed.

## SPONSOR'S ROLE & RESPONSIBILITIES

- The sponsor is generally the workflow's executive owner, in terms of improvement budget authority, and final arbiter of the vision and business objectives related to the workflow.
- The sponsor may appoint a meeting coordinator to handle workshop logistics and incidental administrative support.
- The sponsor has the influence and/or authority to compel the right experts to attend.
- The sponsor will give opening remarks. Process Triage's account manager or facilitator may help with these remarks and verify progress is being made toward these objectives during the workshop.
- The sponsor will receive mid-day and day-end progress reports from both the facilitator and designated expert participants as desired.
- The sponsor will attend the workshop conclusions and recommendations review (4<sup>th</sup> Quarter) and be prepared to ask clarifying questions if additional explanations are needed.
- The sponsor will give closing remarks.
- The sponsor will review and approve all expenses related to the workshop.

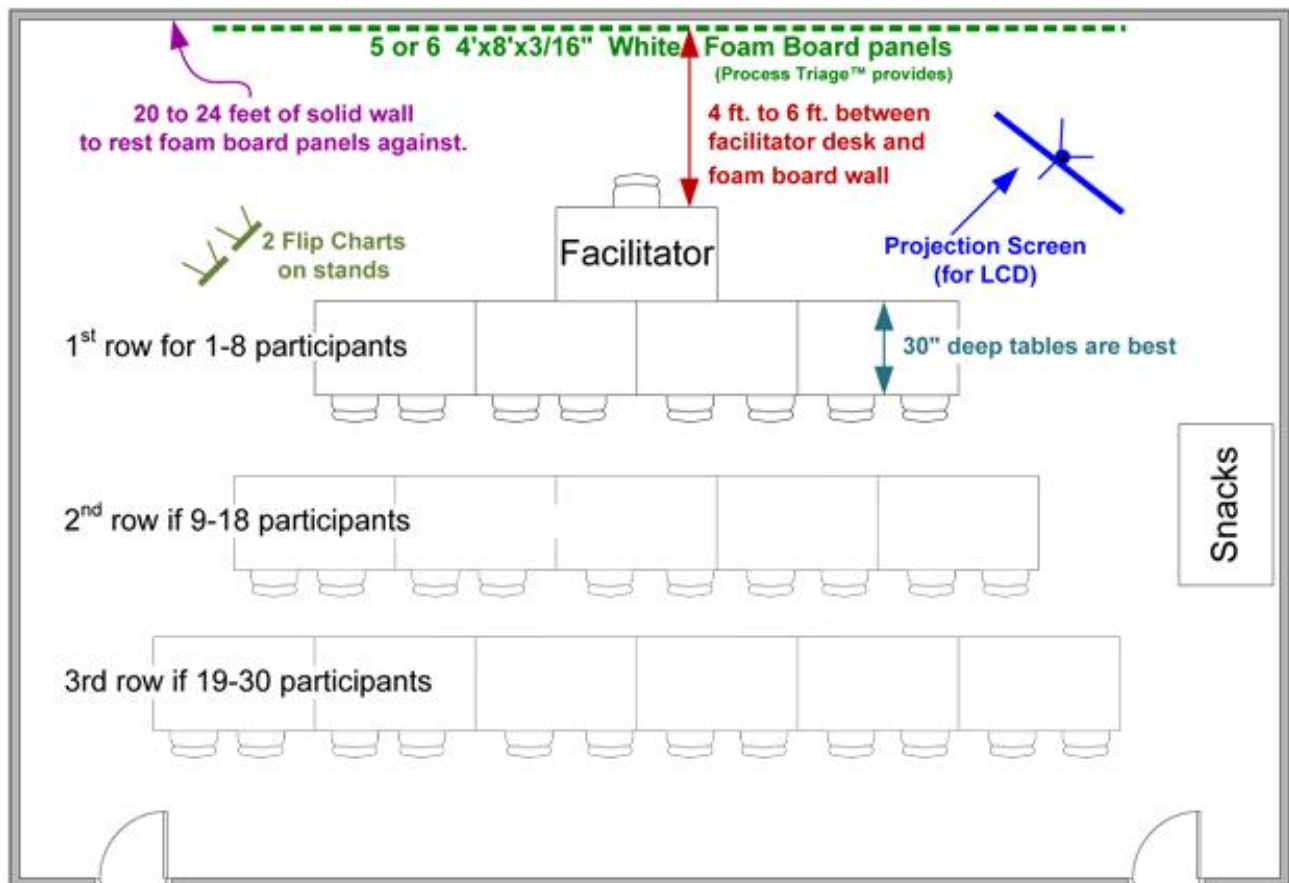
## PROCESS TRIAGE<sup>®</sup> FACILITATOR RESPONSIBILITIES

- Plans the workshop with the Sponsor, including the preparation of and approving the Statement-of-Work.
- Signs any nondisclosure agreements if required.
- Acquires the foam board panels for the conference room and bring necessary workshop mapping and triage supplies (includes a lap top and LCD projector).
- Inspects the workshop room. Modify the room set-up if needed.
- Facilitates the workshop, including crafting the Process Triage<sup>™</sup> Workflow Map and all triage examinations indicated in the workshop's scope of work.
- Ensures the completion of all documentation requirements.
- Ensures the initial set of maps and other workshop deliverables are delivered to the sponsor as agreed.
- Ensures the sponsor has been invoiced under the terms of the statement of work.
- Follows-up with the sponsor after the workshop and confirm all expectations were met or exceeded, and remedy any that were not.

## TEAM CAPTAIN RESPONSIBILITIES

- Workshop subject matter experts' leader during the workshop, usually drawn from the middle management staff
- Project manages the workshop on behalf of the executive sponsor.
- Represents the executive sponsor's interests if the sponsor is not in the room.
- Following the facilitator's guidance, the team captain leads the Small Now and Big Now prioritization and assignments during the 4<sup>th</sup> quarter.

## ROOM REQUIREMENTS



## WORKSHOP SUPPLY LIST

### Provided by host site

- Conference Room, 24' x 12'+, long wall (24') must be solid enough to stand foam core boards up against.
- Work tables for participants + 1 for the facilitator + table(s) for lunches / snacks if provided. Participants will face the foam board wall.
- Comfortable ergonomic chairs for attendees (will be sitting most of the day).
- LCD Projector screen, portable preferred (will need to move it around).
- Two (2) flip chart pads on stands, and markers, with access to resupply.
- Lunches & snacks (optional)
- A small bottle or two of anti-bacterial hand sanitizer (for snack table).
- Coordinating instructions for each participant, such as preferred lodging, parking lots, directions from airports, and site access requirements.
- Optional break-out room or private area for participants who may need to step out for urgent matters.

### Provided by Process Triage®

- 5 or 6 4'x8' x 3/16 foam board wall panels (e.g. Beifang®).
- LCD projector and laptop computer for Process Triage® presentations & documentation templates
- Mapping and triage examination supplies
- Proprietary (non-disclosure) method guides and slide shows as needed.

**AGENDA** *(Cut & Paste)*

**7:45 Meet & Greet**

**8:00 Opening Remarks – Executive Sponsor**

**Administrivia -- Team Captain or Host Site Coordinator**

**Participant Introductions – Name, Organization, Content Expertise Area**

**Agenda & Rules of Engagement Review – Process Triage® Facilitator**

**8:30 1<sup>st</sup> Period – Build the Map**

**10:20 10 minute break**

**10:30 2<sup>nd</sup> Period – Triage Examinations**

**12:00 Lunch / Working Lunch (Group Decision, recommend catered lunch)**

**12:45 Halftime – Team Captain's Strategic Objectives**

**1:00 3<sup>rd</sup> Period – Points-of-Pain**

**2:50 10 minute break**

**3:00 4<sup>th</sup> Period – Small & Big Now's.**

**\*5:00 Closing remarks and Participant Survey**

**\* Be Prepared to work late. We'll know if we must work late and how long by 3:00 pm.**