BASIC TRIAGE WORKSHOP CASE STUDY

3-Tier Help Desk Process

Narrative and Worksheet Exhibits
These case study artifacts are typical of a one-day, well hosted, property staffed triage workshop.

**Business Process Triage**

In a medical triage, patients are examined to provide medical care to the most urgent needs within the resources available. In Business Process Triage, our patients are business processes. Their points-of-pain are process inefficiencies and other dysfunctions.

Following a facilitated triaging method, we guide your own process’s expert team to identify, prioritize, and (if you choose to), assign and schedule the most urgent process improvement opportunities. These action items and project proposals are practical and achievable based on the team’s expert knowledge of current capabilities. These action items and projects are driven by your business objectives, with results within 90 days if implemented.

**This Case Study**

The IT Help Desk – 3-Tier Model case study consists of three process map sheets and this document, which includes the case narrative and the Small Now / Big Now action item and project proposals which comprise the triage results.

The maps illustrate the triaged business process (the Base Map map sheet), its operational behavior (the Triage Exams map sheet) and the triage team’s assessment where the process that merits improvement or investment to achieve the workshop host’s objectives [the Points-of-Pain map sheet].

The Small Now / Big Now worksheet set includes the individual worksheets nominated to remove the Points-of-Pain. The set includes a cover page that includes their priority ranking. The back page reports the participants’ workshop evaluation.
The IT Help Desk 3-Tier Business Process

The Client
The case study is an actual client’s results, one with enough Information technology complexity and user population to require a dedicated help desk. The Executive Sponsor was the Chief Information Officer. The Workshop Host was a middle manager directly responsible for staffing and running the help desk. The triage team consisted of front-line help desk staff representing initial call resolution specialists (Tier 1) and systems experts representing specialized knowledge and training (Tier 2).

The Host’s Triage Focus
The Workshop Host’s triage focus was to “Improve “One Call” resolutions, improve successful resolution speed, improve customer satisfaction, and improve performance reporting.” Process points-of-pain hinder these objectives. Small NowSM action items and Big NowSM project proposals remedy these pain points if implemented.

Map Symbols
Process Triaging uses a process illustration format expressly designed for triaging. There are only four symbols of which two are most important.

Actions that make things or decisions are illustrated by solid arrows. Their name describes what is performed. Each unique action (arrow) is numbered for easy identification only; the number does not indicate sequence or precedence. The Results produced by the action are colored circles. Actions are arrows, round things are results.

Results are always observable physical things or events, illustrated in the order they complete.

Green colored results are Process Triggers that, by business rule, require the process to start when they occur.

White and Red colored results are things or decisions within the process owner’s direct control or supervision, paid for by employee or contractor wages or automated tools or systems expense. Whites are non-milestone results; Reds are milestone results, indicating the completion of a natural unit of work where work flow is metered or handed off to the next stage or outside organization.

Blue results are produced by an entity outside the process owner’s direct supervision and represents a loss of supervisory control, such as another organization or outside supplier.

The other two symbols will be explained as they occur in the following narrative.
The **Base Map** illustrates the process being triaged. It is crafted by the facilitator as guided by the triage team during the first two hours. We use a portable wall made of foam core sheets, taped together and sprayed with aerosol adhesive. The Action> Result™ symbols are paper stencils provided by the Process Triage® facilitator.

**IT Help Desk Process Overview (see the Base Map)**

The process consists of six natural units of work or components, highlighted by gray dashed borders: *Incident Ticket Creation* (Actions #10 thru #80), *Incident Communications* (#110 thru #140), *Tier 1 Resolutions* (#210-#240), *Tier 2 Technical Expert Analysis* (#310-#370), *Tier 2 Resolutions* (#410-#470), *Tier 3 Escalations* (#510-#540), *Performance Analysis* (#610-#650), and *Knowledgebase Management* (#710-#730). These segments were nominated by the triage facilitator and approved by the Team Leader.

**Incident Ticket Creation (#10 thru #80)**

The overall process is triggered when the Help Desk [is] Contacted by e-mail or phone call or by the help desk’s web portal (see #40). Tier-2 direct tickets may be system generated alarms at #320. The Tier 1 analyst assesses the issue (#10) and chooses the best resolution script (#20) from the knowledgebase (see the Blue result connected by the dashed Required Result Connector from #10’s result. *This dashed Required Result Connector is the 3rd of four symbols*).

The knowledgebase updates are supplied to this process from a previous help desk cycle. After the script is selected, a new incident ticket is created (#30) or correlated to an existing ticket (#40).

*Both arrows have a hash mark nearest the result they connect from. This hash mark indicates the action is conditional or dependent upon a previous decision. The decision’s rule is explained in parenthesis under the action’s title. This is the fourth symbol.*

The ticket is correlated with other tickets (#40) to avoid generating redundant tickets and to count how often the same issue occurs. If the ticket correlates, it is assigned as a child ticket (#50) to an active parent ticket. The child ticket is processed with the parent and no further action is needed.

If the issue is already known and documented by an escalated but unresolved problem, the ticket is assigned as a child ticket to the problem (#60).

Severity levels are assigned to new issues (#40 ⇒ #70) and known problem ticket children (#60 ⇒ #70).

Tickets are posted to a *Work in Process* workflow for overall ticket flow observation, management, and reporting (#80).
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Incident Communications (#110 thru #140)
If the help desk (Tier 1) analyst assigns a Business Impacting Severity Level to the incident, this incident is further assessed (#110) and a issue status notification is broadcast to the impacted business units (#120). If the incident is severe enough to threaten business continuity, the Business Continuity Process is initiated (#130).

Depending upon the severity level, periodic status update notifications are issued (#140) until the issue is resolved (#14 ⇒ #120).

Tier 1 Resolutions (#210 thru #240)
The Help Desk analyst attempts to solve the issue (following the script chosen at #20, in the proper severity order assigned at #70). Following the script, self-service issues are referred back to the user (#230), closed if resolved (#240), or forwarded to the appropriate Tier 2 fix analyst (#220).

The knowledge base is updated (#710) [E] after the ticket is closed (#240) as necessary.

Tier 2 Technical Expert Analysis (#310 thru #370)
Incident tickets for Tier 2 Expert resolution are forward for analysis (#310) from the Tier 1 Held Desk Analyst (#220), another Tier 2 Expert who’s attempt to resolve is insufficient (#460)[B] or from unresolved, but resolvable Tier 3 escalated incidents (#540) [B].

If the Help Desk-forwarded ticket passes entrance criteria (quality control) the analyst correlates the ticket (#320). If it fails entrance criteria (a lack of completeness, for example), it is returned to for rework (#310 ⇒ #10). The Tier 2 incident ticket is also correlated if an automatic ticket is opened by an IT System (the third process trigger).

Similar to the ticket creation segment, the correlated ticket may be assigned to a master ticket (#60) [C], and/or a known problem ticket (#330). A new incident’s severity is reassessed (#340) and changed if required (#350). After the new ticket severity level is correct, it is prioritized for work (#360) and assigned to an analyst / technical expert for resolution (#370).

If the severity level was changed by the Tier 2 analyst (#350), it is forward to incident communications for impact analysis (#110) [A].

Tier 2 Resolutions (#410 thru #470)
The Tier 2 analyst / technician attempts to resolve the issue (#410). If successful, the ticket is closed (#420). Once closed, the agent drafts or updates an appropriate knowledgebase script if needed (#710) [E]. Business impacting Severity 1 or 2 tickets have root-cause analysis performed (#480), followed up by specific corrective actions (#485), with results published in an incident report (#490).

If the incident is not resolved, it is reevaluated (#450), then forward to another Tier 2 analyst (#460 ⇒ #310) or escalated to Tier 3 for Management Action (#470).

For Severity Level 1 and 2 incidents, the Tier 2 analyst updates the Help Desk regarding resolution success (#440), who will then issue a status notification to the business (#120)[D]. A “Resolution Communication” is issued when the issue is resolved (#430).
The Tier 2 analyst may initiate a process enhancement after attempting to solve an issue (#530).

**Tier 3 Escalations (Management) (#510 thru #540)**

Incidents that cannot be resolved by Tier 2 are forwarded for Management Intervention (#470) for staff analysis (#510). If appropriate, a process enhancement is initiated (#530), closed if resolved (#520), or returned for Tier 2 for reassignment (#540).[8]

Just as in previous ticket closures, knowledgebase scripts may be updated if needed (#710)[E], and status notifications are updated for Severity 1 and 2 incidents (#520 ⇒ #120)[D] including issue resolution details (#430).

**Performance Analysis (#610 thru #650)**

Help Desk performance is periodically reported (trigger). Performance data is gathered (#610) according to specific KPI requirements (the external / blue deliverable connected to the trigger). Performance trends are analyzed (#620) and reported (#630). Problem management tickets (not incidents) may be opened if incidents are recurring (#650), and Improvement Team (Kaizen) tickets and projects are initiated.

**Knowledgebase Management (#710 thru #730)**

A knowledgebase is maintained to assist Help Desk and Tier 2 incident analysis. Issue type resolutions or scripts are drafted (#710), reviewed and tested (#720) and, if approved, published (#730). Unapproved scripts are redrafted (#720 ⇒ #710).

This case study triage map is of typical size, facilitated by our trained facilitator as guided by a dozen experts. This “wall work” took about two hours.

The facilitator documents this draft map into a Microsoft® Visio™ drawing after the workshop, circulates it for review and sign off by the Team Leader and publishes a “Fit for Use” map sheet upon approval. The client receives an Adobe® PDF soft copy. An initial set of hard copy prints are complementary, one set per participant including the sponsor.

**The Triage Exams Map Sheet**

**Triage Exams**

Now that we have a sufficiently illustrated process (our triage patient) we must understand it operational characteristics. How much demand is there for the process? How fast does work flow through it? If there are conditional or situationally dependent tasks, how often are they required? Is there avoidable rework? How much cash does the process burn per milestone result? Are there major IT systems involved and where? These triage exams provide a necessary context needed to propose realistic remedies to pain points.

This case study discusses only those exams requested. There are other exams (http://processtriage.com/PTE_Examinations.html) to support other triage objectives.
Moments of Truth

Moments of Truth (MOT) are occasions where the enterprise (its brand) interacts with its source-of-revenue customer directly and physically. This interaction can be human to human, human to machine, or vice versa. MOT occur when an enterprise advertises its brand, sells a product or service under its brand, fulfills or delivers what is sold, and provides customer care after all services are fulfilled or products used as warranted.

Some assert that the reason any enterprise exists – its raison d’être, are its MOT. Enterprises must design, build, train, profitably manage, and continuously improve their brand’s MOT better than their competition.

A MOT icon (A white arrow inside a blue oval) is placed near an action’s title if that action physically interacts with the enterprises customer. For back office processes, such as IT Development, Finance and Accounting, Logistics, Supply Chain, or Human Resources, the MOT customer may be an internal business unit (and will be noted on the map sheet).

MOT interactions are so essential we usually note them on the Base Map sheet as well as the Triage Exam map sheets. We’ll refer to them when we rank action items and Big NowSM project proposals based on value to the customer.

Help Desk Moments of Truth

The case study Help Desk has several actions the involve MOT, centered around opening incident tickets (#10, #20, #30 and #40), analyzing and resolving issues (#210, #230, #240, #310, #410), keeping the business informed of progress on severe incidents (#140), and closing tickets (#240, #420, #520).

One of the Workshop Host’s triage goals related to these MOT is “Improve first call resolutions.”

Process Demand (Volume)

Workflow Demand describes how often a process is triggered (cycle frequency) or how many results are produced in a selected time period (usually at milestones).

Workflow demand helps understand the complexity or level of effort a proposed Small NowSM or Big NowSM will be to address a pain point.

Case Study Workflow Demand

On the date of the triage workshop, the Help Desk staff estimated they worked 265 user issues per day; 200 called or e-mailed in, 50 generated from their web portal, and 15 auto-generated by IT systems. The Tier 2 staff work between 85 and 100 tickets per day (#410)

Traffic Flow

The Traffic Flow icon describes what percentage of a workflow’s volume takes a conditional path. One must understand the action to determine if the amount of traffic is desirable or not.

Case Study Traffic Flow

• Regarding Tier 1 opened tickets, 75% are e-mail or phone driven, 25% come from the web portal. It is premature to judge this ratio as desirable or not until the host specifies the triage focus.
• Tier 1 tickets correlate to open parent tickets 5% of the time (#50) and known recurring troubles less than 1% (#60). Less than 1% of daily ticket volume are Severity 1 or 2 – business impacting incidents (#110)
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• 5% of Tier1 tickets are referred to self-service (#230), 72% are resolved and closed and 28% are unresolved and forward to Tier 2 (#220). While these percentages are not precisely correct (they should add up to only 95% (see #70), they are accurate enough for triaging. “Close enough” estimates are sufficient.

We reset the traffic flow basis to 100% for tickets forwarded to Tier 2, can give the traffic flow icon a different color (orange) to highlight this change.

• 83% of Tier 2 tickets come from the Help Desk (Tier 1), 17% are system generated – for 100% of new volume. 25% of the daily ticket traffic is reassignments from other Tier 2 agents or Tier 3 (#310).

• Less than 1% of Tier 2 tickets have their severity level changed (#320 ⇒#60)

• 74% of Tier 2 tickets are resolved and closed (A missed estimate during the triage – it happens!), 27% are not resolved on the first look and either forwarded to another analyst (25% @ #460) or escalated to Tier 3 (2% @ 470)

Uninterrupted Work (Process Time)

The Uninterrupted Work icon notes how much time an action or series of actions take to perform without interruption. This assumes no delays or rework and all necessary inputs, supplies, tools and technologies are on hand and fit for use. This uninterrupted time is typically a fraction of the triage exam for Observed Time.

This duration measurement is multiplied by a loaded labor rate to estimate the unit cost of labor.

Case Study Uninterrupted Time

• It takes the Help Desk (Tier 1) about 10 minutes to create a ticket (see the milestone #70) and another 10 minutes to resolve or forward a Tier 1 ticket (see the milestone results at #220 and #240

• The Tier 2 analysts will spend an hour analyzing their tickets ( #370’s milestone result), and about 80 minutes to resolve the issue (#420’s milestone result)

Observed Time (Cycle Time)

The Observed Time icon describes how long a series of actions take when considering uninterrupted work (legitimate process time), rework (good or bad), queuing (e.g. waiting for resources), and waiting for management intentions or permissions. It is the time someone observing the actions would calculate process speed.

Case Study Observed Time (Cycle Time)

• The observed time to open a ticket is about the same as the uninterrupted time, 10 minutes (see the time brackets for the Incident Ticket Creation segment) and another 10 for Tier 1 Resolutions.

• Tier 2 Technical Expert Analysis takes about an hour with a range of 5 minutes to 2 hours. Tier 2 Resolutions average between 4 to 8 hours.

Labor Cash Consumption (Financial Notes)

The Financial Notes icon captures information about how a process consumes cash. This case, which is typical of labor intensive processes, highlights loaded labor costs, estimated at a per-ticket level, then aggregated based on workflow demand (volume).
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The Loaded Labor Rate, for triaging purposes, is $.10 per $10K annual gross wages per minute of uninterrupted work (process time). Loaded Labor includes base salary plus 20% for benefits and infrastructure support, such as office space and generic workstation automation. Tools and technologies needed for a specific action or task are calculated separately as capital equipment or IT systems chargebacks.

Case Study Financial Notes (Loaded Labor)

- Each opened Tier 1 ticket costs about $3.33 LLR (see #70), and another $3.33 to resolve or forward to Tier 2.
- The business spends about ±$714K LLR per year opening tickets, the same amount additionally to resolve or forward, for a combined Tier 1 LLR run rate of ±$476K.
- The business’s Tier 2 organization spends about $1.8M LLR on analyzing issues and another $1.45M resolving them, approximately $3.25M LLR annually.
- The entire Help Desk (Tiers 1 and 2) have a combined Direct Labor spend of ±$3.82M LLR.

Executive Sponsor / Workshop Host’s Triage Exam Summary

A surprising amount of behavioral information is captured. While not of business case exactness, it is entirely useful for triaging purposes. The situational awareness these exams provide sets up the triage team for nomination rational process improvement suggestions.

Here’s a thumbnail summary of our triage findings:

**The IT Help Desk handles about 265 issues a day – ±34,450 per year for a direct labor cost of ±$3.8M. 72% of user issues are resolved during the first call in about 20 minutes for about $6.67 LLR each. Tier 2 expert resolutions, some 85-100 a day take from a few minutes to hours to resolve for an average $275 LLR each (from $5.00 to $500 depending on the difficulty.)**

This short, crisp summary is extremely helpful when new sponsors are introduced to the process after coming on board.

The Points-of-Pain Map Sheet

After the triage team maps their process (the patient) and marks it up with triage exam notes, they are ready to identify points-of-pain to triage into candidate action items and projects to address them.

The Workshop Host begins the Points-of-Pain portion by specifying the team’s business objective. Any observable, measurable behavior within the process that shows the process cannot or will not meet, or that hinders this objective is a Point-of-Pain. This symptom must have its root-cause identified and remedied to achieve the objective.

Each workshop participant is given a few Post-It® notes to identify the points they observe, usually their top three or four, depending upon the number of participants. The triage protocol needs between 30 and 60 altogether. Participants do not discuss their pain; duplicates are
welcome and help prioritize the remedies later identified. One Post-It® note (pink square) on the map represents one participant’s pain point.

The most actionable pain points are described in terms of something measured, such as “Only 15% of Target Market Reached” as opposed to something less specific, such as “Not enough sales.”

Finally, the pattern of pain points, their dispersion and clustering, give insight into how to invest in process changes or improvements. Clusters reflect consensus, so addressing them pleases more participants. Yet upstream pain points usually have greater paybacks because they usually remove downstream problems as well.

Case Study Points of Pain

See the Points-of-Pain map sheet. The most painful portion of the Help Desk process is ticket entry into Tier 2 Expert Analysis (#310). Some twenty points of pain were note for a half-dozen reasons.

The next two clusters occur in Incident Ticket Creation when the issue is assessed (#10) – 6 pain points, followed by choosing the best resolution script (#20) – 4 pain points.

Knowledgebase Management garnered three points of pain, as well as Tier 2 ticket mis-assignments (#460).

Merely looking at the Points-of-Pain map leads one to focus on Tier 2 escalated tickets submissions (#310). This makes sense given the workshop host’s focus of improving:

• One call resolutions
• Successful resolution speed,
• Customer satisfaction, and
• Performance reporting

The Points-of-Pain illustration is extremely effective in focusing the host’s and executive sponsor’s attention on what need to be addressed, and in so doing, pushes aside other matters in the mind-space that might distract them.

Small Now’s, Big Now’s, and Not Yet’s™

Small Now’s™ and Big Now’s™
The Process Triage concludes with brainstorming candidate Small Now’s™ and Big Now’s™, action items and project proposals respectively.

A Small Now™ is a one or two person task that does not require a significant plan, budget, or collaboration effort.

A Big Now™ is project-size effort that requires more than a few people, needs a plan and a budget, perhaps an executive sponsor(s) or business case.

Generally speaking, a subordinate’s Big Now™ is one of their boss’s Small Now’s™; and their boss’s Big Now™ is one of their boss’s boss’s Small Now’s™! The ideal arrangement is to break efforts down to action item-size (Small Now™) where individual contributor skills are applied.
After each Point-of-Pain is reviewed and confirmed to hinder the host’s objective, the triage team proposes a remedy in SMART terms, (Specific, Measurable, Achievable, Relevant, and Time Bound) and assigns it a Small NowSM or Big NowSM-size effort and fills out the appropriate Small/ Big NowSM worksheet.

Worksheet Ranking and Not Yet’sSM

Executive Sponsors and Workshop Hosts indicate they enjoy the worksheet ranking exercise the most. They are not allowed to talk or influence the triage participants’ ranking exercise in any manner. They are advised to actively listen to the triage team’s reasoning, arguing, haggling, and justifications for why they ranked the Small / Big Now’sSM stack.

After all pain points are addressed by a worksheet, the entire worksheet stack is ranked three times.

The first ranking prioritizes each sheet by its value to the customer; its Moment of Truth value.

The second ranking pass prioritizes them by the investor’s value or Use of Cash; which worksheet, if implemented, matters most to the financial bottom line.

The third and final ranking prioritized the worksheets by strategic fit with the host’s objectives, considering the first two rankings as context.

If the Small NowSM in its entirety or a Big Now’sSM project plan can be completed in 90 days, it is assigned and scheduled. If not, the worksheet is flagged Not YetSM and set aside for business case.

The Workshop Host keeps the top page of the worksheets (a 2-ply NCR form); the facilitator uses the canary copy to compile results.

The Participant Satisfaction Survey

The triage workshop concludes with the participants completing an anonymous Participant Satisfaction Survey. The Process Triage® facilitator compiles the results and provides a report, with commentary. This commentary highlights our lessons learned from workshops with similar results.
# BASIC TRIAGE WORKSHOP CASE STUDY

## 3-Tier Help Desk Process

### PROCESS TRIAGE WORKSHOP

**Action Items Projects Log**

<table>
<thead>
<tr>
<th>Priority Rank</th>
<th>Customer Value</th>
<th>Investor Value</th>
<th>Action Item or Project Title</th>
<th>Scope</th>
<th>Due Date</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Fully document tickets (User ID, Issue Description, etc)</td>
<td>Action Item (Small Now)</td>
<td>11/30/2012</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>2</td>
<td>6</td>
<td>7</td>
<td>Establish &quot;issue-driven&quot; [employee] training</td>
<td>Action Item (Small Now)</td>
<td>12/31/2012</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>BIG DEAL: Establish Continuous Improvement Team [The following two projects are included]</td>
<td>Big Deal</td>
<td>11/30/2012</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>[3]</td>
<td>5</td>
<td>3</td>
<td>Establish Continuous Ticket Quality Improvement [Team]</td>
<td>Project (Big Now)</td>
<td></td>
<td>(Omitted)</td>
</tr>
<tr>
<td>[6]</td>
<td>3</td>
<td>5</td>
<td>Establish Continuous Ticket Routing Quality Assurance</td>
<td>Project (Big Now)</td>
<td></td>
<td>(Omitted)</td>
</tr>
<tr>
<td>4</td>
<td>2</td>
<td>2</td>
<td>Enforce Proper Knowledgebase Use</td>
<td>Action Item (Small Now)</td>
<td>11/30/2012</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>5</td>
<td>4</td>
<td>4</td>
<td>Establish Continuous Knowledgebase Improvement</td>
<td>Project (Big Now)</td>
<td>12/31/2012</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>7</td>
<td>9</td>
<td>6</td>
<td>Update performance measurements of incident management</td>
<td>Project (Big Now)</td>
<td>10/31/2012</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>8</td>
<td>7</td>
<td>8</td>
<td>Self-service policy enforcement with cost justification</td>
<td>Action Item (Small Now)</td>
<td>NOT YET</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>9</td>
<td>10</td>
<td>10</td>
<td>Executive enforcement of ticket system usage (policy)</td>
<td>Action Item (Small Now)</td>
<td>NOT YET</td>
<td>(Omitted)</td>
</tr>
<tr>
<td>10</td>
<td>8</td>
<td>9</td>
<td>Enforce Tier1 to update &quot;Sev 1 &amp; 2 Blast&quot;</td>
<td>Action Item (Small Now)</td>
<td>NOT YET</td>
<td>(Omitted)</td>
</tr>
</tbody>
</table>

**Process Triage Facilitator’s Notes**

The last three "Not Yets" are executive policy matters that (Omitted) may need a staff recommendation on. The Big Deal is an on-going capability as much as a project to establish it; 75% of the points of pain were included in these two Big Now’s.
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**SMALL NOW**
1 or 2 individuals | Action Item-size effort

Do not complete Section 2 until ALL worksheets’ Section 1’s are complete. Section 3 until all Section 2’s are complete.

### 1 Tier
- **Assigned to:** (Snipped)
- **Earliest Start Date:** TBD
- **Due Date for completion:** Aug 30

<table>
<thead>
<tr>
<th>Specific Deliverable</th>
<th>Points-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fully documented help desk tickets (user ID, issue descriptions, etc.)</td>
<td><strong>Insufficient info provided</strong></td>
</tr>
<tr>
<td>Fewer tickets returned due to insufficient documentation</td>
<td><strong>Not enough info</strong></td>
</tr>
<tr>
<td>Do we have the skills &amp; resources to achieve this? Describe.</td>
<td><strong>Missing User ID’s</strong></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Enforce Tier 2 desk QA**

**Yes - Nominated in Triage Session**

**4 hours**

**Points-of-Pain** (copy from Post-IE Notes on wall map)

<table>
<thead>
<tr>
<th>Task (#)</th>
<th>Point-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Insufficient info provided</td>
</tr>
<tr>
<td>10</td>
<td>Not enough info</td>
</tr>
<tr>
<td>10</td>
<td>Missing User ID’s</td>
</tr>
</tbody>
</table>

### 2 Tier
- **Assigned to:** (Snipped)
- **Earliest Start Date:** TBD
- **Due Date for completion:** Dec 31

<table>
<thead>
<tr>
<th>Specific Deliverable</th>
<th>Points-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish “issue-driven” training</td>
<td><strong>Sponsor’s Notes &amp; Cost/Benefit Estimate</strong></td>
</tr>
<tr>
<td>Fewer repetitive hardware escalations</td>
<td><strong>Completed after workshop</strong></td>
</tr>
<tr>
<td>In-house university / on-line docs</td>
<td><strong>Use existing training budget (maybe add 20%, use up 4Q buckets)</strong></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Yes - Nominated in Triage Session**

**8 hrs. in-house, on-line JIT**

**Points-of-Pain** (copy from Post-IE Notes on wall map)

<table>
<thead>
<tr>
<th>Task (#)</th>
<th>Point-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>(Too many) avoidable tickets.</td>
</tr>
</tbody>
</table>

* Rank against entire set of worksheets.
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### BASIC TRIAGE WORKSHOP CASE STUDY
#### 3-Tier Help Desk Process

#### BIG NOW™
**More than 2 individuals | Project-size Effort**

<table>
<thead>
<tr>
<th>Overall Rank</th>
<th>RANK (1=Best)</th>
<th>To Customer</th>
<th>To Investor</th>
<th>Use of Cash</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>5</td>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assigned to:**
(Snipped)

**Earliest Start Date:** TBD

**Due Date for Project Plan:** Nov 15

1. **Specific Deliverable:** Establish continuous ticket quality monitoring & improvement
2. **How is progress or completion measured?** When ongoing quality improvement is tracked and reported.
3. **Do we have the skills & resources to achieve this?** Yes – In-house BA’s available
4. **Relevant to our objectives?** Yes – Nominated in Triage Session
5. **How much time is needed to complete:** The Project Plan only 4 hours
   - **Execute the project plan:** 20 hrs + sustain

#### Points-of-Pain (copy from Post-it® Notes on wall map)

<table>
<thead>
<tr>
<th>Task #</th>
<th>Point-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>310</td>
<td>Not enough info in tickets</td>
</tr>
<tr>
<td>310</td>
<td>Tickets have incorrect info</td>
</tr>
</tbody>
</table>

#### SMALL NOW™
**1 or 2 individuals | Action Item-size effort**

<table>
<thead>
<tr>
<th>Overall Rank</th>
<th>RANK (1=Best)</th>
<th>To Customer</th>
<th>To Investor</th>
<th>Use of Cash</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assigned to:**
(Snipped)

**Earliest Start Date:** TBD

**Due Date for completion:** Nov 30

1. **Specific Deliverable:** Enforce proper knowledgebase use.
2. **How is progress or completion measured?** Tickets route to correct experts
3. **Do we have the skills & resources to achieve this?** Yes – Training incident coordination & up-to-date knowledge base
4. **Relevant to our objectives?** Yes – Nominated in Triage Session
5. **How much time is needed to complete this action item?** 2 hrs weekly net; continuous

#### Points-of-Pain (copy from Post-it® Notes on wall map)

<table>
<thead>
<tr>
<th>Task #</th>
<th>Point-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Wrong scripts selected: inexperience.</td>
</tr>
<tr>
<td></td>
<td>1st tier doesn’t check knowledgebase</td>
</tr>
</tbody>
</table>

#### Sponsor’s Notes & Cost/Benefit Estimate (completed after workshop)

**Will need a team to Tier 2 experts to do this well.**

#### Sponsor’s Notes & Cost/Benefit Estimate (completed after workshop)

**Start w/enforce existing policies, now.**
### BASIC TRIAGE WORKSHOP CASE STUDY

#### 3-Tier Help Desk Process

#### BIG NOW℠

More than 2 individuals | Project-size Effort

Do not complete Section 2 until ALL worksheets’ Section 1’s are complete, Section 3 until all Section 2’s are complete.

<table>
<thead>
<tr>
<th>Assigned to:</th>
<th>Earliest Start Date</th>
<th>Due Date for Project Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Snipped)</td>
<td>WIP</td>
<td>Dec 31</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Specific Deliverable</th>
<th>How is progress or completion measured?</th>
<th>Do we have the skills &amp; resources to achieve this? Describe.</th>
<th>Relevant to our objectives?</th>
<th>How much time is needed to complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish continuous knowledgebase improvement</td>
<td>When knowledgebase update is created &amp; refreshed periodically</td>
<td>Yes [Snip] + other SME’s</td>
<td>Yes - Nominated in Triage Session</td>
<td>The Project Plan only 4 hours Execute the project plan Sustain WIP</td>
</tr>
</tbody>
</table>

#### Points-of-Pain (copy from Post-It® Notes on wall map)

<table>
<thead>
<tr>
<th>Task (-1) #</th>
<th>Point-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>710</td>
<td>Knowledgebase not updated</td>
</tr>
<tr>
<td>20</td>
<td>Insufficient knowledgebase</td>
</tr>
<tr>
<td>20</td>
<td>(ditto)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsor’s Notes &amp; Cost/Benefit Estimate (completed after workshop)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long term pay-back in avoided training $ &amp; lower labor cost on front desk.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rank</th>
<th>Overall Rank</th>
<th>RANK (#1-Best)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>5</td>
<td>4</td>
</tr>
</tbody>
</table>

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### BIG NOW℠

**More than 2 Individuals | Project-size Effort**

1. **Specific Deliverable:**
   - Update performance measuring of incident management

2. **How is progress or completion measured?**
   - Useful metrics from process

3. **Do we have the skills & resources to achieve this? Describe.**
   - Leadership team input

4. **Relevant to our objectives?**
   - Yes - Nominated in Triage Session

5. **How much time is needed to complete:**
   - The Project Plan only 5 hours
   - Execute the project plan ? depends ?

### Points-of-Pain (copy from Post-It Notes on wall map)

<table>
<thead>
<tr>
<th>Task ( # )</th>
<th>Point-of-Pain</th>
<th>Task ( # )</th>
<th>Point-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>610</td>
<td>Tickets not categorized</td>
<td></td>
<td></td>
</tr>
<tr>
<td>610</td>
<td>Insufficient process metering</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Sponsor’s Notes & Cost/Benefit Estimate (completed after workshop)

- Improved resolution time, performance measuring user satisfaction.

---

### SMALL NOW℠

**1 or 2 Individuals | Action Item-size effort**

1. **Specific Deliverable:**
   - Policy enforcement with cost justifications

2. **How is progress or completion measured?**
   - Users attempt self-service more often

3. **Do we have the skills & resources to achieve this? Describe.**
   - Yes BA hours

4. **Relevant to our objectives?**
   - Yes - Nominated in Triage Session

5. **How much time is needed to complete this action item?**
   - 8-16 hours initially, 4 weeks+

### Points-of-Pain (copy from Post-It Notes on wall map)

<table>
<thead>
<tr>
<th>Task ( # )</th>
<th>Point-of-Pain</th>
</tr>
</thead>
<tbody>
<tr>
<td>230</td>
<td>Self-service refused by submitter / executive</td>
</tr>
</tbody>
</table>

---

### Sponsor’s Notes & Cost/Benefit Estimate (completed after workshop)

- Not yet, need biz case.
BASIC TRIAGE WORKSHOP CASE STUDY
3-Tier Help Desk Process

1. Specific Deliverable:
   Executive enforce ticket system usage

2. Overall Rank:
   - To Customer Moments of Truth: 9
   - To Investor Use of Cash: 10

3. Assigned to:
   Not Yet

4. Sponsor's Notes & Cost/Benefit Estimate:
   Need to know cost / how much is actually happening. Why can't tier 2 open the ticket?

* Rank against entire set of worksheets.  
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### Process Triage® Workshop Participant Experience Survey

<table>
<thead>
<tr>
<th>Q.</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
<th>Avg</th>
<th>Lo</th>
<th>Med</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Was this Process Triage™ Workshop worth the time you invested compared to other work you could have focused on?</strong> (1 Strongly Disagree - 10 Strongly Agree)</td>
<td>10</td>
<td>9</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td></td>
<td>9.4</td>
<td>0.8</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td><strong>Historically, a participant’s long-term satisfaction depends upon how well Small and Big Now’s are implemented. How confident are you that this follow though will happen?</strong> (1 Strongly Not Confident - 10 Strongly Confident)</td>
<td>8</td>
<td>6</td>
<td>6</td>
<td>8</td>
<td>3</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>5</td>
<td></td>
<td>7.5</td>
<td>1.3</td>
<td>8</td>
</tr>
<tr>
<td><strong>Do you think those who allocate resources to manage and improve your workflow better understand what to invest in to meet the strategic objectives?</strong> (1 Strongly Disagree - 10 Strongly Agree)</td>
<td>8</td>
<td>4</td>
<td>5</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>10</td>
<td>4</td>
<td></td>
<td>6.2</td>
<td>1.5</td>
<td>8</td>
</tr>
<tr>
<td><strong>Were you satisfied with your Process Triage™ facilitator performance?</strong> (1 Unsatisfied - 10 Exceeds Expectations)</td>
<td>10</td>
<td>8</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td></td>
<td>9.7</td>
<td>0.6</td>
<td>10</td>
</tr>
<tr>
<td><strong>Would you recommend a Process Triage™ Workshop to your peers?</strong> (1 Very Unlikely - 10 Very Likely)</td>
<td>10</td>
<td>8</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td></td>
<td>9.4</td>
<td>0.9</td>
<td>10</td>
</tr>
</tbody>
</table>

**OPEN-ENDED SURVEY QUESTIONS**

**What workshop activity or result most satisfied you?**

- Points-of-Pain & various sticky notes/variables colors = emphasis;
- Understanding the percentages of actual requests,
- I believe it will be so great for our ticketing process & putting the pain points on the board and finding we all had the same pain points,
- The Small Now (action item worksheets) & Big Now (project worksheets) ranking;
- I needed this for my job, and the CRUD mapping;
- Yes, it helped me drive out issues & Pain Points;
- Interaction w/other staff, CRUD Mapping, Pain Points Identification "Small/Big Now’s";
- Points of Pain Identification;
- The [Small Now/Big Now] triage;
- Seeing the Small Now/Big Now process come to fruition. Watching people volunteer to accomplish tasks (sign up for Small/Big Now’s);
- Small Now’s and Big Now’s items, hoping we can finally make the required changes.

**The "<6" scores indicate participant doubts. The sponsor / host is advised to follow through with the recommended improvements!**

**What workshop activity or result was least satisfying?**

- None — all valuable; (ditto); (ditto); (ditto); (ditto); (ditto);
- The amount of dollars used to support an incident;
- Nothing — liked the workshop very much.

**Do you have any recommendations that would improve the workshop experience?**

- Good as is, none at this time; none; everything was great;
- No, the process worked well as is; no;
- Really can’t think of any dissatisfaction;
- Long days are probably necessary, but a hardship on those who work early shifts.

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Process Triage - What is it?

A fast, results-focused process and team improvement protocol

**A Medical Triage** assesses patients, determines how severe their injuries are and then treats them in the right order within available capabilities.

In **Process Triage**, our patients are business processes and instead of injuries we have inefficiencies and other types of pain points to assess and direct remedies.

**At ProcessTriage**, we leverage your staff’s expert process knowledge and some mathematics to triage one or more of your business processes.

Following our triage workshop guide, we choose your process (the patient), select your triage team members, and then facilitate them through the triage workshop. We’ll identify and prioritize a slate of improvements to launch immediately and outline the business case for any delayed opportunities.
Why Process Triage?

The reasons are compelling

**Triaging develops your continuous improvement culture.** A continuously learning and improving organization excels in two things; top-down direction that focuses on both the customer experience and resource stewardship and tactically savvy improvements driven by front-line experts from the bottoms-up.

Triaging syncs top-down strategy with bottoms-up execution quickly and thoroughly. A day of triaging yields 90 days of focused business and process improvement.

**Triaging launches great teams.** Triaging is a superb team launching tool. Triaging’s highly interactive, collaborative nature requires fact-based, business-focused conversations. Newly introduced team members reveal their expertise that, in turn, builds respectful professional relationships. The objective facilitator keeps conversations focused on the task and hand.

These focus points ensure your success. Your facilitator welcomes your time to discuss them further as needed, and looks to you to perform these points to the best of your ability.

**Triaging finds workable improvements.** When your front-line high performers understand your overall strategy, they’ll make improvement suggestions *if they know you’ll resource them*. Since the triage protocol begins with your strategic intent, every improvement action item or project proposal has strategic fit.

**Triaging outlines your business case for more resources.** Smaller improvements and the plans for bigger improvements that cannot be delivered in 90 days are called *Not Yet’s*. Each *Not Yet* includes a level-of-effort estimate. Considered together, the stack of *Not Yet’s* feed your business case for additional resources that, if acquired and allocated, accelerate progress toward your objectives. Skip-level senior executives who observe the second half of the triage are pre-sold on such business cases.*

**Triaging exposes potential leaders.** Great executives, among many skills, are especially good at recognizing talent. Triaging exposes highly imaginative individual contributors who must persuade their peers to prioritize their improvement proposals. Executive sponsors often clear their calendar to observe the second half of triage workshops to both find these individuals and sharpen their own situational awareness.

**Triaging improves situational awareness.** High performing employees are willing to “fall on their swords” over principles or proposals they deeply care about. Yet sometimes their passion is misdirected because they lack the big picture. Process triaging broadens their perspectives and clarifies what’s most important to fix.

**Triaging fosters good staff work.** Triaging is philosophically grounded in The Doctrine of Completed Staff Work. The triage protocol begins with the host’s strategic direction and limits its scope to what the expert team can influence. These recommendations are based upon expert knowledge, and present clear, actionable courses of action.

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* The record for pre-sold *Not Yet’s* is $250K, pending a complete business case. The senior executive released $125K for these *Not Yet’s* with just the triage findings. Both the team host and team were experienced triagers.
Review the triage results. The triage nominated, prioritized, and (if it was in scope) assigned and scheduled Small Now action items to be completed and initiated planning for Big Now projects. Unassigned Small and Big Now’s tagged with a Not Yet cover sheet await resources or another Small or Big Now to complete first.

Every Small and Big Now, if implemented, advances the team toward their process’s objectives.

All triage participants, including the executive sponsor, host, team leader, and team members - all are on the same page. They understand the host’s objectives in practical terms. Those who know the process best agree on what improvements all should focus on first, then next, and so on.

Complete block #4 of the Small / Big Now Worksheet. Triaging is designed to make excellent directional recommendations with a simple scope and priority choices - action item or project; now or later. This may not be rigorous enough to “green light” the Small or Big Now immediately.

Working from the top priority Small or Big Now, make a few notes about additional staff work, if any, needed to understand the deliverable. We recommend an economic cost-benefit estimate, however approximate.

Who completes Block #4 is the Host’s decision. Some assign it to a junior team member with senior mentor for staff skill development. Some do it themselves because it involves executive responsibilities such as staffing or business model changes, or it’s faster or, so they’ll understand the deliverable better in order to explain it.

If Block #4’s completion discovers a material change in scope that merits revisiting its ranking, choose the best way to change the rank. Here are your options:

- **Preferred:** Don’t re-rank until the worksheets are fleshed out (see talking point #3, next).
- **Acceptable:** Have the team huddle and re-rank one more time based on Block #4’s information.
- **Beware:** The host granted the team some authority to prioritize improvements if assigning and scheduling was included in the triage. Changing their decisions should involve them with the same respect granted previously.

Flesh out the selected Small and Big Now’s. If a Small or Big Now’s meaning or scope lack enough clarity to assign and schedule it, then complete the staff work to make it so.
1-Day Process Triage® Workshop & High Performance Team Launcher

Business Process Triage
In a medical triage, patients are examined to provide medical care to the most urgent needs within the resources available. In Business Process Triage, our patients are business processes. Their points-of-pain are process inefficiencies and other dysfunctions.

Following a facilitated triaging method, we guide your own process’s expert team to identify, prioritize, and (if you choose to), assign and schedule the most urgent process improvement opportunities. These action items and project proposals are practical and achievable based on the team’s expert knowledge of current capabilities. These action items and projects are driven by your business objectives, with results within 90 days if implemented.

Agenda
Opening Remarks (Executive Sponsor)
ACTION>RESULT Mapping
2 hours, Team + Facilitator
Triage Examinations
2 hours, Team + Facilitator
Strategic Objective Review
After lunch, Executive Sponsor
Points-of-Pain
1-2 hours, Team + Facilitator
Small Now’s & Big Now’s
2-3 hours, Team + Facilitator + Sponsor
Action Items (Small Now’s), Projects (Big-Now’s)
Closing Remarks & Satisfaction Survey.

The Workshop Investment
• A day of your process expert’s time plus any related travel.
• A Facilitator fee billed per workshop. This rate includes the facilitators pre-work, workshop facilitation, and post-workshop documentation. Incidental travel, lodging, and meals are invoiced (at cost).
• Host site costs if any. An in-house conference typically works well.

Deliverables
• 90 days of bottoms-up, tactically sound improvement proposals aligned with top-down strategic objectives.
• An end-to-end process improvement prioritization. The entire process leadership team agrees on what to improve first, then next, and so on.
• A set of delayed action items and projects to business case. Use these delayed proposals to jump start your business case for additional resources.
• An ACTION>RESULT Process Map for reuse. The process map has a long shelf life, ideal training and process analysis use.
• Baked-in Team Building Benefits throughout the day, including a shared understanding of your process’s scope of work, current workflow performance, and the professional satisfaction of knowing their team.
• Very cost effective use of your experts’ team development time.

Contact: Joseph (Rosey) Rosenberger
Consulting Facilitator, Process Triage
913-269-3410
www.processtriage.com

The Process Triage Guide PDF Download
The Workshop Readiness Checklist PDF Download
ProcessTriage®
Executive Sponsor Packet

Talking points and exhibits from the introduction meeting

This is the electronic version of the Process Triage introduction meeting handout for Executive Sponsors of Process Triage® workshops.

It assumes the recipient has received the in-person information presentation. If that is not the case, contact us at (913) 269-3410 (US Central Time) for a walk-through.

Process Triaging Organization

The Executive Sponsor selects the process(es) to be triaged and engages the Process Triage® facilitator either directly or through a Professional Services (prime) Contractor. The sponsor selects the Process Triage Host. This host is the day-to-day process owner and is usually a direct report.

The host works with the facilitator to accomplish the triage’s scope of work. Advised by the facilitator, the host selects Team Members, and from them, the Team Leader.

This team leader will assist the host in verifying the best team members and project manages the triage workshop for the host. Additionally, this first among equals team member represents the triage team’s activities and findings to the host (similar to a jury foreman).

The Process Triage Guide, included in this packet, explains your role and responsibilities, including those of the host, team leader and term member; the venue set-up, and actions after the triage.

After you have reviewed the guide, proceed with the following task list (next page).

(Continued)
Executive Sponsor Packet

Task List (in order):

1. Assess your improvement area needs and urgency, both short term (operational stress points) and long term (continuous improvement culture).

2. Execute an appropriate contract or professional services master agreement with Process Triage® or your professional services contractor that provides technical augmentation staffing and Process Triage® facilitator services. (You’ll leverage this master agreement for post-triage initiatives)

3. Select the business process(es) to be triaged.

4. For each process, select the Host (usually a direct report) and delegate the process triage initiative to them.
   a. For 1st Time Hosts, schedule an introduction meeting with the facilitator.
   or
   b. For experienced hosts, issue your scope and schedule guidance.

5. After the Host recommends his or her tactical approach and schedule, reserve your calendar to observe the workshop’s second half (typically all afternoon).

6. Verify your project management office (by any other name) is ready to receive triage workshop prioritized initiatives (action items and projects) as anticipated.

Your professional services account manager and Process Triage® facilitator remain available to assist as needed.

Downloadable PDF’s and Knowledgebase Links

The Process Triage® Executive Short Stack Video (11 minutes) and Deck (PDF download)
The Process Triage® Fact Sheet
The Process Triage® Workshop Guide
Sample Workshop Readiness Checklist (WRC) Your facilitator provides the blank version.
Launch and focus major business process changes with Process Triage® workshops.

Process triaging launches and complements other business process change methodologies. Process Triaging finds what to fix first, then next, and so on. Your business process change leaders will apply the appropriate methodology and project management approach based on the triage results.

The triage workshop identifies process experts’ pain points related to the leader’s specific business objectives. They nominate, prioritize, and assign action items and projects for immediate execution with leader collaboration.

90 Days of assigned action items and projects

WEEK(S) to MONTH(S) depending upon scope and urgency of improvement goals.
The Workshop Readiness Checklist (WRC)

The checklist covers the essentials.

The Workshop Readiness Checklist (WRC), contains the workshop planner’s checklist.
Download