Running Senior Level Workshops

Preparation

- Company mission/vision/strategy from Chairman's Report in Annual report or website
- Scope of project from project proposal and scope document
- Objective of workshop from project sponsor or project manager (PM
- Personal objectives of CEO, project sponsor and project manager (PM)
- Scope & context of workshop
- Audience – name, role, title
- What personal conflicts & politics in the group, and where is power?
- Terminology – what will turn them on, turn them off, no-no's
- How much understanding & buy-in does the audience have of processes?
- What is the pain to resolve?
- Where is ROI or win

Agenda/sequence

- Introductions – go around the room
- Introduce session – why they are there, pain, …
- Objectives of the session – working meeting to get a result
- Benefits of session –
    - defines company operational strategy
    - sets context for specific projects
    - sets priorities for improvement projects
    - kick start projects
    - identifies project sponsors and demonstrates support
- Show 'finished product' - so they know what they are aiming at
- Strategic objectives on white board (tangible – with measures)
- Mapping from outcomes back, not starting point forward
- Identify process owners
- Identify priority processes for initial projects
- Next steps

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Conducting Mapping

- Important thing is get interaction and momentum – get them talking/arguing
- Start with blank sheet
- Start at back end of process "bill and collect payment" because it is easy, non-contentious and it gets the ball rolling
- Then move forward "what allows you to create the invoice"
- Don't worry about inputs and outputs initially, but as the debate grows between audience about the context and scope of each activity use the input and output to define.
- To get them to focus on activities use "I have just joined your organisation as a XXXX, and I need to XXX. How do I know what to do next? How do I know when I've finished"
- If they cant agree, move to a whiteboard to sketch a flow of processes, then go back and map

Issues, objections

- Can't agree on certain activities
  - o revert to white board
  - o try to define inputs & outputs
  - o look to CEO/sponsor to resolve
- Don't have the correct people in the room
  - o check if workshop results will be considered 'agreed'
  - o look to CEO/sponsor to resolve
- People focus on departments or reporting lines not processes
  - o Ask the 'I do XXXX, how can I understand what to do?' questions
- IT-focused people describe in systems (automated process) terms rather than the complete process
  - o Ask the 'I do XXXX, how can I understand what to do?' questions
  - o Put systems as resources