2020 Show Me Excellence Virtual Summit
Breakout Session: Process/Value Stream Mapping – Using the Tools
1:40 – 2:15 PM
Presenter: Michelle Dankoski
Moderator: Mary Corey
Better Together
Session Objective

To discuss some of the in-person and virtual mapping tools available, and how they might be successfully applied in different settings.
Session Agenda

- Approach Overview
- Preparation Tips
- Questions
- Tool #1 – Overview and Applications
- Questions
- Tools #2 through #4 – Overview and Applications
- Questions
Chat Question #1

1. How are you currently facilitating projects?

   A. In person

   B. Virtually

   C. A blend of both

   D. None of the above. I'm just looking for information.
Chat Question #2

If you’re mapping virtually, what tools are you using?
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The Six P’s of Preparation

1. **Purpose**
   • What is the purpose of the mapping session?

2. **Product**
   • What is the expected product or outcome of the session?

3. **Participants**
   • Who will attend, and how prepared are they to do virtual mapping?

4. **Probable Issues**
   • What expected issues will need to be addressed?

5. **Process**
   • What steps will get us to where we want to go?

6. **Place**
   • How will you effectively utilize your virtual meeting environment/platform?
Questions?
Tool #1 - Microsoft Visio

• **What is it?:**
  • Part of the Microsoft Office family
  • Allows for easy flowchart or diagram creation with a variety of shapes available – from basis to complex.
  • Microsoft 365 allows for collaboration.

• **Application:**
  • Facilitator shared via Webex
  • Facilitator captured steps (or activity value) throughout discussion.
  • Used for value stream mapping.
Tool #1 - Microsoft Visio (Cont.)
Tool #1 - Microsoft Visio (Cont.)

• Advantages / Disadvantages:
  • A: Eliminated need to transfer map from paper to digital
  • A: Controlled environment
  • D: Project participants don’t play as active of a role
  • D: Conversations weren’t as rich
Tool #1 - Microsoft Visio (Cont.)

- Suggestions for successful use:
  - More than one facilitator
  - Use a Round-Robin approach to engage all team members
  - Remind participants not to multi-task
Tool #1 – Microsoft Visio

(Cont.)
Questions?
Tool #2 – Microsoft PowerPoint

• What is it?:
  • Part of the Microsoft Office family
  • Presentation design and delivery program

• Application:
  • Pre-made slide of with map.
  • Zoom breakout session for analysis.
Tool #2 – Microsoft PowerPoint (Cont.)
Advantages / Disadvantages:
- A: More hands-on for participants
- A: More open discussion/debate
- D: Limited features
- D: Lots of pre-work required by facilitator
- D: Unfamiliarity with Zoom (facilitators and participants)
Tool #2 – Microsoft PowerPoint (Cont.)

Suggestions for successful use:

• Make sure participants are familiar with the sharing platform.
• Consider using only for smaller project tasks – like analysis.
Questions?
Tool #3 – Miro

• What is it?:
  • Online collaborative mapping and diagramming tool.

• Application:
  • Process mapping
  • Project tracking
Tool #3 – Miro

• **Advantages / Disadvantages:**
  • A: Project work all in one place or using same tool
  • A: Highly collaborative
  • A: Many free templates to choose from
  • D: Premium features cost extra
  • D: Learning/training required
Tool #3 – Miro

• **Suggestions for successful use:**
  • Allow enough time for team to acclimate to features
  • Make sure that you have IT or Security approval
Tool #4 – Mural

• What is it?:
  • A digital workspace for online collaboration.
  • Enables teams to think and collaborate visually to solve problems.

• Application:
  • Process mapping
  • PICK Charts
Tool #4 – Mural

Prioritization

Brainstorm

- facilitation
- what's our budget
- agile methods
- digital transformation
- remote workshops
- remote facilitation
- imaginary workers
- consultant - partner network
- Pol
- Megan
- Lamin
- Sebastian
- Celeste

Importance vs. Feasibility
Tool #4 – Mural

Impact

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<th>Effort</th>
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<tr>
<td>Low</td>
<td>Possible</td>
<td>Kill</td>
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<tr>
<td>High</td>
<td>Implement</td>
<td>Challenge</td>
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Implement *(Just Do It)*
Alternatives:
Tools Recap

• Advantages / disadvantages to all options.
• The “right choice” depends heavily on the project team, the knowledge within the group, timing, and desired outcomes.
• Allow time for project participants to familiarize themselves with the tool.
• Training may be required.
• Experiment and learn.
Lessons Learned Recap

1. Remember the six P’s of preparation.
2. Be mindful of what you spend time on.
3. Flexibility is key!
4. Take time to investigate your options.
Questions?
Thank You!

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