

# Fully Illustrated Example of a Process (Actual size is 8 1/2"x11")

This is an example of the typical "process maps" you will find in the Retrospects and Post-mortems e-Guide. Every step is clearly shown, but we don't stop there. We also include "hints" and also "you are here" markers to ensure that you do not get lost.

The example below has been reduced in size from its original 8 1/2 X 11"

All process maps include "you are here" markers. It tells you where you are in the process so you can be certain that you have not missed any steps.

**WHERE YOU'RE AT**

At this point several hours may have passed. You will have collected a considerable number of yellow stickies. All of this is raw data as — it is not prioritized nor organized in any fashion. It is clear that no more valuable input can be collected.

**8 DEVELOP MESSAGE TO MANAGEMENT**

At the end of the discussion (Debrief) you will develop a message to management: what the team wish management to know about the event. For example, perhaps it is something that is beyond the responsibility of your team. This is a separate document or presentation you and your team develop for your managers and executives. It is important because it engages them in the debriefing process. Plus, it's your opportunity to ask for support and resources to implement needed changes. Your message should be clear but not confrontational. Avoid blaming management; rather, present your information as an opportunity and in a positive vein. This message can be delivered to your management by a small group from your team, or you can do it yourself. Another possibility is to ask a willing manager to deliver the message during an appropriate staff meeting. This is an optional step but one we highly recommend. Your executives will welcome your suggestion. Moreover, management can be very helpful in ensuring change that is long-lasting.

Every step in the process map is clearly numbered to avoid confusion

...CONT'D

**7 ORGANIZE AND PRIORITIZES NECESSARY IMPROVEMENTS**

Once you have covered your agenda, it's time to organize and then prioritize the input using consensus. You must perform this step before declaring the session over. It is very important! There are several ways to approach this critical step. For example, use the affinity diagram or story-boarding approaches. You might want to bring in someone experienced in organizing a clear message. For example, you might need someone with the highest overall

This is a link to critical tools that you will need when using this process map. Click on it, and it takes you to the right tool or template

**Important** Your Message to Management needs to include your triumphs and successes! Debriefs aren't just about what needs to be improved but also all the good things that took place. Ensure that your managers and executives know about your team's results and breakthroughs.

And it's worth repeating: Keep all your reports and presentations blame free! Performance issues and incompetence can be dealt in separate forums — your HR people can help.

**IMPORTANT NOTE:** "Incompetence" simply means someone didn't have the skills, knowledge or ability to perform a job. It doesn't mean he or she is a bad person. We recognize that the term "incompetence" in most contexts has a negative connotation. We are using the term as neutral, and we expect you to use it the same way.

We cannot omit the statement, but we can rephrase it: "lack of competence," "lack of fitness" or "lack of abilities."

**See Also** Critical Tools — for more help with step #7, specifically ways to prioritize.

Every process maps also includes important information that will help you avoid errors. These are derived from experience with many teams over many years of experience

**Important** This is a good opportunity to also review your Parking Lot and extract relevant information in your Message to Management.

CONTINUED

# Fully Illustrated Example of template (Actual size is 8 1/2"x11")

This is an example of the typical template (Form). The example below shows a fully developed example (from actual teams). For every example there is a corresponding template (form), which you can use. You can fill in the information and share with all your team members around the world.

The example below has been reduced in size from its original 8 1/2X 11"

Every example has a corresponding template (form), which you can use to fill in your information and share with your team around the world. These are automatic links within the e-Guide. And there is always a "BACK" button so you can review the examples



## Example: Selecting the Right Project to Debrief

The template below is an example of a simple tool you can use to select the right project. You can further develop the template to track, prioritize and optimize the results from debriefs.

Project Candidate	Business Case	Focus (Topic)	Plan Leader	Target Date	Deployment Leader
Selection of projects is based on a clear criteria, which is applied to all candidates.	The business rationale that justifies the expense in resources to perform the debrief.	The specific area of focus for the debrief. The desired outcome will dictate the focus.	The name of the person responsible for leading the planning and execution of the debrief.	The intended date when the main session of the debrief is planned.	The name of the person who is responsible to lead the implementation of the results of the debrief.
"Eagle Eye" platform	The investment in developing the new platform was over 10 million dollars. We must understand the effectiveness of the investment during the development cycle.	We will focus on our relationship with our vendors as 40% of the new platform was outsourced. We will also focus on the use of the new CAD software.	George Smith, VP of Supply Chain will lead the debrief process.	We will debrief two weeks after the product is announced to the market.	Mary Carter will be responsible for ensuring the deployment of the finding and continuous improvement.
"Columbia" (new product)	This project will not be debriefed as it is a simple improvement to an existing product.				
"NewWave" (new product)	This is our first product where more than 50% of the product is being outsourced to vendors across Asia. We must identify areas of improvement in our supply chain.	The focus will be in three areas: <ul style="list-style-type: none"> <li>Contract negotiation and execution.</li> <li>Technical documentation.</li> <li>Schedule management.</li> </ul>	Lani Lui will lead the debrief; he is the project manager.	We will debrief twice. <ul style="list-style-type: none"> <li>At the mid-point of the project.</li> <li>After the product has been rolled out to the market.</li> </ul>	No person has been identified for deployment. For now our Quality Manager, Miguel Martinez, will monitor and make recommendations.

All examples are derived from actual teams and over many years of experience — No hypothetical examples

# Fully Illustrated Example of a Tool (Actual size is 8 1/2"x11")

This is an example of the typical tool found in the e-Guide. The example shows the choice of the timing you have to perform debriefs. You can use the tool to work with your team and define your "debrief strategy".

The example below has been reduce in size from its original 8 1/2X 11"

The "tools" contained in the e-Guide will help you work with your team to make the right decisions. This example is about selecting the right timing for your debrief. The timing, of course, will change with each development project.

## Detailed Time line of Opportunities

Type of Debrief	Reason	Timing of Debrief
<b>1. Pre-Birth</b>	<ul style="list-style-type: none"> <li>• Incorporate learning from previous projects.</li> <li>• Team building.</li> </ul>	<ul style="list-style-type: none"> <li>• Before or at the time of your project kick-off.</li> </ul>
<b>2. Interim or Progress Debrief</b> <i>During key dates in the life of your project such as major milestones.</i>	<ul style="list-style-type: none"> <li>• Impact change throughout the life of the project.</li> <li>• Early corrective action.</li> <li>• Improve communication.</li> </ul>	<ul style="list-style-type: none"> <li>• Planned times during the life of your project — use your judgment.</li> </ul>
<b>3. Team Handoff</b> <i>Your project is transferred to another organization or location.</i>	<ul style="list-style-type: none"> <li>• Inform new team coming on board.</li> <li>• Formalize the handoff.</li> </ul>	<ul style="list-style-type: none"> <li>• Major milestones.</li> <li>• When transferring to an outsource resource.</li> <li>• When transferring to manufacturing.</li> <li>• When transferring off-shore.</li> </ul>
<b>4. Customer Engagement.</b> <i>Critical points in your project when considerable customer involvement is required such as in contract manufacturing or custom software.</i>	<ul style="list-style-type: none"> <li>• Early feedback from your customers on a new product.</li> </ul>	<ul style="list-style-type: none"> <li>• During development.</li> <li>• After the new product has been announced.</li> <li>• As part of the acceptance process.</li> </ul>
<b>5. Crisis Recovery</b> <i>Very useful to objectively diagnose the reason for failure and determine corrective action.</i>	<ul style="list-style-type: none"> <li>• Solve current problem.</li> <li>• Recover from a major setback.</li> <li>• Eliminate repeating the same errors in the future.</li> </ul>	<ul style="list-style-type: none"> <li>• When the stuff hits the fan!</li> <li>• As soon as the crisis is identified.</li> <li>• At the end of the crisis period.</li> </ul>
<b>6. End of Project</b>	<ul style="list-style-type: none"> <li>• Evaluate the entire project.</li> <li>• Closure for the team.</li> <li>• Benefit future projects.</li> <li>• Inform management of your accomplishments.</li> </ul>	<ul style="list-style-type: none"> <li>• At the end of your project.</li> <li>• Shortly after the end of your project.</li> </ul>

# Fully Illustrated Examples (Actual size is 8 1/2"x11")

The e-Guide contains many examples from actual teams to help you understand the concepts with absolute clarity. All tools and templates come with an actual example from the real world. The example below has been reduce in size from its original 8 1/2X 11"

## Examples: Effectively Describe Issues and Opportunities

### The Protocol

Description of the issue or opportunity.

Description of the possible root cause.

Description of the impact, damage or improvement.

Describes what went wrong or what went right. (No names of individuals!)

Describes the root cause of the problem. If you don't know it, then leave this section blank.

Describes the impact, damage or opportunity. Remember, debriefs are also about things that went well and should be repeated.

Author's Name

First we describe the proper protocol (format) used to describe a specific item in a debrief

### Example 1

Description of the issue or opportunity.

Description of the possible root cause.

Description of the impact, damage or improvement.

The Operators Manuals were not delivered on time due to a delay at the printing plant in India, which forced us to ship incomplete and poorly printed Operators Manuals for the first 1500 units.

M. Change

Next, we include actual examples from real teams to ensure clarity.

### Example 2

Description of the issue or opportunity.

Description of the possible root cause.

Description of the impact, damage or improvement.

The first prototypes were delivered on time, were faithful to the design and had excellent detail. We used a new supplier to try a new Rapid Prototyping machine. The speed and quality saved us at least two weeks in the schedule and provided a higher quality prototype.

L. Medina

We also include a link to additional information or other tools which might help you.

There is always a "BACK" button so you can return to the examples



**See Also**  
**Yellow Stickies Protocol**  
— for more information about this process in general.