Process Mapping
FOCUS *Interviewing Stakeholders*

THE BASICS

- Interview ALL stakeholders - each will provide a different perspective.
- Ask for the AS-IS process - this will provide a good starting point for your process mapping.
- Find out the start and end points of the process - also, determine what happens before and after what stakeholders tell you.
- Find out what happens before the process starts, i.e., is the data held by a third-party system - which system is the source of truth?
- Look for leakages. Many organisations have a siloed way of thinking.
- Reminder to use open questions – what, why, how, where, when
- At this stage, what is the task? Send a note, read or sign a document, or answer a question.
    - THEN, what mechanics make a specific part of the process work? Is the note sent by email, text, or a call and what information must be provided? Or is it a reminder?
- Ensure you get a good understanding of all pain points - and then prioritise these.
- Ask what the expected outcomes or goals of the process.
- Try to get a good understanding of any reporting requirements right at the start so that you can plan for these throughout.

Remember these things:

1. You are looking for the detail. Get as much as possible. Tease out the ambiguity.
2. You will likely get only some of the information you need in one interview. Go away and plan the process but keep in touch with stakeholders to check, review and amend.
3. Think about the people involved and ask, "Why is this happening?" Sometimes subjects have fear, doubt and uncertainty.
    How to reassure them that it's not an exercise to turn them out? But it's more about making them more efficient and ensuring they do more of the right work. Freeing them up to do more of the "touchy-feely things."
4. Get them to challenge the process so you can begin the process improvement discussion.
5. Look for non-happy paths! All the nuances are in the exception handling.

BEST PRACTICES

Build trust and creditability

Listen

Ask the right question at the right time

Ask a question and allow them to answer. Sit and look at them without saying more, allowing the subject to reveal more

Know your audience and the problem that you're trying to solve, and how you'd explain it to them

With broader focus groups, be sure to also interview individuals who might have scenarios that they're afraid to share in a group setting

Beware:

- There's always a certain amount of "whinging," be patient with your subject. Let them work through it.
- As practised as you are about your questioning and as much as you know about the subject matter, there will always be hidden things. Be open to discovering them.
- Subjects often leave out things they don't think are necessary or don't want to bother you. You want all of those hidden things.
- Don't take things at face value, such as, "that's the way it's always been done." Chances are a junior stakeholder will say that is what their partner or manager wants, only to discover that the partner or manager is unaware of the specific step in question.
- A lot of times, senior managers or partners are not at the "cold face" of things and don't know the process details.
- Be cautious with dominant speakers in a group discovery session.
- Nothing is worse than having to redo work because you didn't get all the information you needed. And then you have to go back and redo things.
- Hidden agendas. Ensure all the stakeholders are in the room. Some stakeholders might not want others to have the level of influence over the feedback, and therefore, the process design.