Case Study Scenario: City Event Planning

ABOUT THE CASE

You will work in a team of 4-5 people, using a virtual space of a Zoom Teamroom and a Mural e-whiteboard. You and your teammates are Subject Matter Experts (SMEs) regarding the Promote Event Process. Some work with the Urbanville City Event Planning Team (CEPT) and others with UrbanMarketing.Com (UMC). (The narrative provides key information--you can make up the rest.) A Facilitator/Technographer will help guide your team and record its findings.

SCENARIO
The City Event Planning Team (CEPT) plans events for Urbanville. Their mission: Build community, develop the economy, and support local businesses. CEPT contracts with UrbanMarketing.Com (UMC) to promote the events. Today you will focus on improving the promotion sub-process.

GENERAL WORKSHOP QUESTION
How do we plan an event--from start to end--efficiently, effectively, and within budget?

TODAY'S SPECIFIC QUESTION
How can we improve the promotions part of the process to operate more effectively, consistently, and profitably?

WORKSHOP AGENDA (for the City Event Planning case study)
The Case Study exercises correspond to the primary steps of a Process Improvement agenda.
(Strikethrough text indicates those default agenda items that are not practiced in this case study.)

AS-IS Workshop Agenda

1. Introduce Session
   · Create High Level Process Map
2. Review Level 1 Process Map developed with client input
3. ~~Stakeholder Analysis (optional)~~
4. Create Detailed Process Maps
   · Exercise 3: Create Level 2 Detailed Process Map (activity "4.0 Promote Event")
5. Brainstorm & Analyze Key Pain Points/Disconnects
   · Exercise 4: Develop Disconnects (activity 4.0)
6. ~~Wrap Up & Next Steps~~

TO-BE Workshop Agenda

1. ~~Introduce Session~~
2. ~~Review & Update Current Maps and Disconnects~~
3. Brainstorm & Analyze Solutions
   · Exercise 5: Develop solutions (4.0 Promote Event)
4. Battle Royale
   · Exercise 6: Prioritize Solutions & Brainstorm Implementation Ideas (4.0 Promote Event)
5. Wrap Up & Next Steps

High Level Process Map for City Event Planning

In this case, leadership has already developed a first draft of the AS-IS High Level map. Activity 4.0 (Promote Event) in the map will be the focus of work for our class and these exercises.
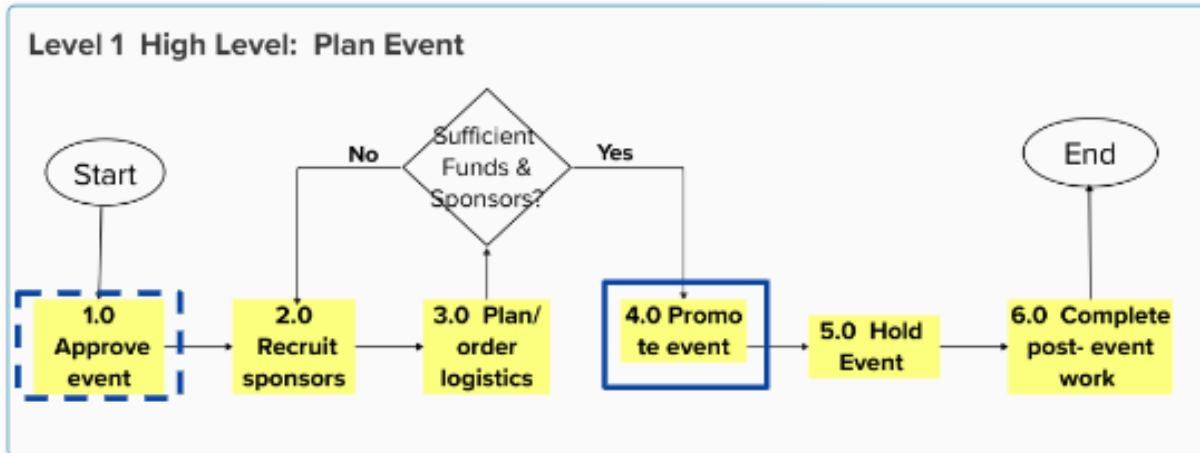
EXAMPLE OF A DETAILED LEVEL 2 MAP: 1.0 Approve Event

Below is an example of the procedure for the first activity, "1.0 Approve Event". This activity takes place throughout the year as event ideas arise or their timing draws near.
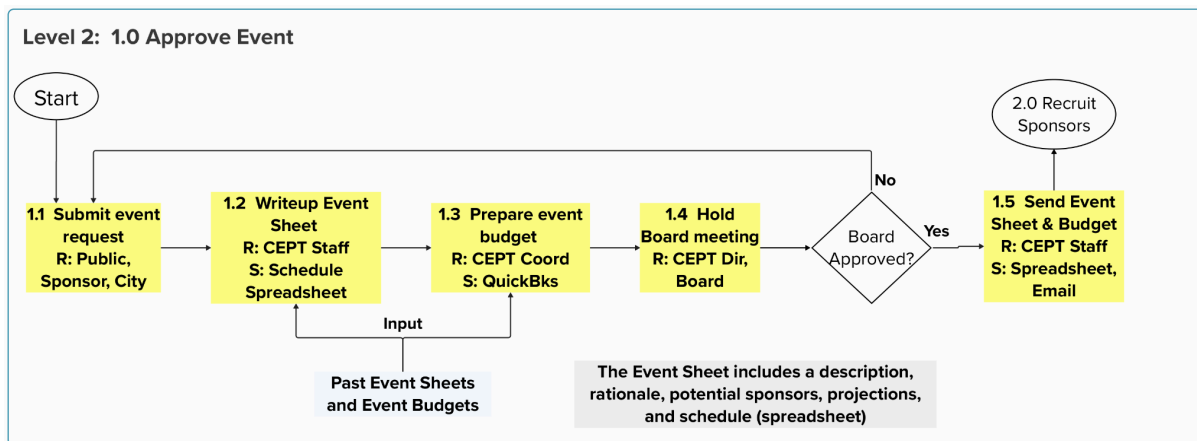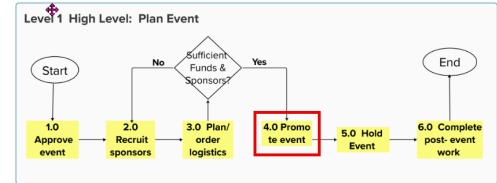
Exercise 2: Map the Current "As-Is" Process(30 minutes)

Work with your process improvement team to create a detailed level 2 map showing how the "4.0 Promote Event" process currently operates.

Case Narrative: How the 'Promote Event' Process Currently Works

Two groups coordinate to promote events for the city of Urbanville. The City Event Planning Team (CEPT) decides on the events and coordinates their execution. But promotion isn't in their skillset, so they contracted with UrbanMarketing.Com (UMC), a local company run by Barb & her staff.

The promotion process starts when UMC receives an email from CEPT with a new Event Sheet & Budget. (*This is sent after the event was approved (step 1.0), sponsored (step 2.0), logistics ordered (step 3.0), and has a sufficient budget.*) A UMC staff person first identifies the target market and selects appropriate media. Next they draft messaging for each media and prepare an invoice for the actual promotion costs. (The budget was simply a ballpark estimate.)

The messages and cost are reviewed in a Go/No Go meeting between CEPT and UMC. There the decision is made to go ahead or rework the promotion. If CEPT gives the go ahead, UMC starts doing the various promotion tasks. When a UMC staff completes a task, they email Barb, who updates the schedule and sends them their next task to work on. When the promotion is completed, the process moves ahead to the next high level task, 5.0 Hold Event.

STOP HERE UNTIL ASKED TO PROCEED

Exercise 3: Brainstorm & analyze disconnects/pain points   (15 minutes)

Case Narrative: Challenges with the Current 'Promote Event' Process

UMC is a busy place. Barb is managing the promotion of 40-50 events per year for Urbanville, not to mention UMC's other clients. Two very experienced staff members, Bob and Sally, do most city event promotion. Other less experienced staff help during peak times--like summer.

While Bob and Sally get frustrated waiting on Barb for task assignments, other staff often are pretty lost when assigned an event. Because the current promotional process is not well documented, they are interrupting Bob and Sally for help.

For example, staff often face the issue of what to do when their invoice is way over budget? For repeat events, CEPT staff based the new promotion budget on last year's actual. But they seem to make wild guesses for new events. Bottom line: after the UMC staff prepare the promotions, they cost them out for an invoice. If they are way over budget, the UMC staff have to rework the entire promotion. And that introduces delays and wastes staff time, which in turn eats away profits from the CEPT contract.

Since procedures are not documented, a lot of time is spent "checking with Barb" to see what needs to be done next, who should be doing what, and when it should be done. She tracks each event with its "schedule spreadsheet". But those were created by CEPT staff who don't understand promotions. So Barb is adjusting the task timing on the fly. It's overwhelming.

It definitely helps that many events are repeated annually. But there is not much learning from one time to the next. Around the watercooler, UMC staff ask one another why the same mistakes are made over and over? Plus, why are some events not increasing attendance? Participation should grow from year to year if they could re-target their promotions with demographic information from the prior year.

STOP HERE UNTIL ASKED TO PROCEED

Exercise 4: Brainstorm and Analyze Solutions (To-Be Workshop)   (20 minutes)

You will be using your own natural intuition and insights from the case, so…

This space intentionally left blank

STOP HERE UNTIL ASKED TO PROCEED

Exercise 5: Prioritize Solutions & Brainstorm Execution Ideas   (15 minutes)

To-Be Workshop

City Event Planning Case

Exercise 5: Brainstorm implementation ideas

FACILITATION QUESTION What does leadership need to consider in order to implement the top solutions?

Special Case Instructions
• Use your experience and discussions for this.

1. Facilitator introduces activity and question

2. SMEs work individually in Mural
  ▫ Create a couple ideas regarding implementation on blue cards
  ▫ Place to right of related solution

3. Facilitator leads team discussion analyzing ideas
  ▫ Discuss to clarify, combine, organize, & build on ideas

Identify what leadership needs to know	• Describe solution	• Potential obstacles
	• Benefits/rationale	• People to involve
	• Resources needed	• Dependencies
	• Goals	• Measures

Tips
• Brainstorm ideas to explain to leadership what is needed to execute these solutions and why they are important.
• The point is to use the expertise of the entire group to identify things leadership should consider--this is a start on the ideas.

🕐 15 min

PROCESS MANAGEMENT LAB

Please go to your Mural Board and Zoom breakout room.

You will be using your own natural intuition and insights from the case, so…

This space intentionally left blank

STOP HERE UNTIL ASKED TO PROCEED