



Exercise 6: Planning Your Project

Instructions: To help you reflect on what you've been learning and prepare for conversations with your organization's leadership, use this worksheet to begin planning your project.

- a. Select a process you explored in Exercise 1
- b. For each question, select one option and identify why that makes the most sense for this process in your organization
- c. Add your responses to the tables below.

1. What is the process name, and why is it worth improving? *(use this process for the worksheet)*

Process Name <i>(Process name should begin with verb and end with noun)</i>	
What are a few major problems / frustrations / pain points with the process?	

2. Will you facilitate the process improvement workshops in-person or virtually?

Workshop Type <i>(select one)</i>	Key Rationale for Selection	Implementation Notes
In-Person Virtually		

3. Will the project use longer (two ±5 hour) workshops or multiple, shorter workshops?

Workshop Structure <i>(select one)</i>	Key Rationale for Selection	Implementation Notes
Longer Workshops Multiple, Shorter Workshops		

4. Should all stakeholders participate in the workshops at the same time or will you need to facilitate additional stakeholder input sessions? *(check one option)*

No Stakeholder input sessions needed

One or more stakeholder input sessions are needed ⇒ If checked, please complete the table below.

Stakeholder Group	Relationship to Target Process	Input Needed

5. What type of an approach is needed: process-improvement or a continuous improvement?

Workshop Approach <i>(select one)</i>	Key Rationale for Selection
Process Improvement (PI) Continuous Improvement (CI)	