

Improvement Name:

Improvement Owner:

Last update:

Workshop Preparation Canvas

Context



What is a given in your team/context?
What has been changing in your team/context and may provide a challenge?
How has this impacted your Key Performance Indicators?
What is the impact this has had on your suppliers and (internal) customers?

Keep it to the point, and use visuals/simple charts that clearly show problems/opportunities.
Start with what people (should) know and ground them. Then explain a key shift that led to a problem. (Situation, Complication, Implication).

Business Goal



What measurable impact do you need to achieve (not an action)?
By when does this need to be delivered?
At what investment can this be done? What guidance do you have on means to implement?

Make this memorable and sexy.

Scope



Indicate START and STOP of the process or stream where changes are allowed.
Which departments and sub processes are IN SCOPE?
Which departments and sub processes are OUT OF SCOPE?
What direction/type of solution should the team not look towards?
Which departments/projects may be impacted by your work?
Which departments/projects may impact your work?

Logistics



Room booked
Room set up arranged (whiteboards, chairs, power, ...)
Lunch / Drinks booked?
If shop floor visit: stakeholders informed? Safety equipment needed?

Invites sent for workshop?
Invites sent for SMEs and/or inspiring speaker?
Invites sent for report out?

Agenda done and shared?
Does it follow Current/Ideal/Future/Actions?
Data & insights done?
Slide deck done?
Facilitation plan done?

Workshop plan



When will the workshop be?
How long should it take?
Will there be a report out? At what time?

Workshop Participants



Who will attend the workshop?
What is their role in the workshop?
Do they bring expertise?
Are they empowered to make decisions?

What is expected before/after the workshop?

Report Out Audience



Who should be in the report out?
Typically the +1 of participants
What is expected of the audience? Listen or steer?
What are their interests, fears and expectations?

Measuring Success



What is the target KPI?
How fast will it improve?

What are closely related KPIs that should improve?
What are closely related KPIs that should not change?

Use visuals here.
SQDCM provides a straightforward framework

Documents & spaces



Link to your shared/cloud folder
Link to potential chat group / collaborative space

Workshop lookahead / dry run



With one or two partners:
Review whether slides provided by others are relevant and concise.
Simulate the Current State exercise.
What info is missing?
What experiences are missing (e.g. floor visit, video, ...)
Is the scope (start and finish) of the exercise clear?

Simulate the Ideal State exercise.
Is there enough inspiration and context?
Is the briefing clear? What does success look like?
Do you have design principles that you need to agree to?

Simulate the future state exercise:
What roadblocks do you foresee for Ideal State?
How would you prioritize them? Do you need supporting data?

