

5 TEAM-CENTERED APPROACHES TO BEING A  
STANDOUT FACILITATOR

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**LESSONS ON VALUE STREAM MAPPING**



# THINK ABOUT THE TEAM

- ▶ Primer: Value Stream Mapping
- ▶ Five VSM Best Practices
  1. Socialize, socialize, socialize!
  2. Be a teacher
  3. Have a clear, well-written charter
  4. Keep your champion engaged
  5. Don't be afraid to change the plan
- ▶ Resources



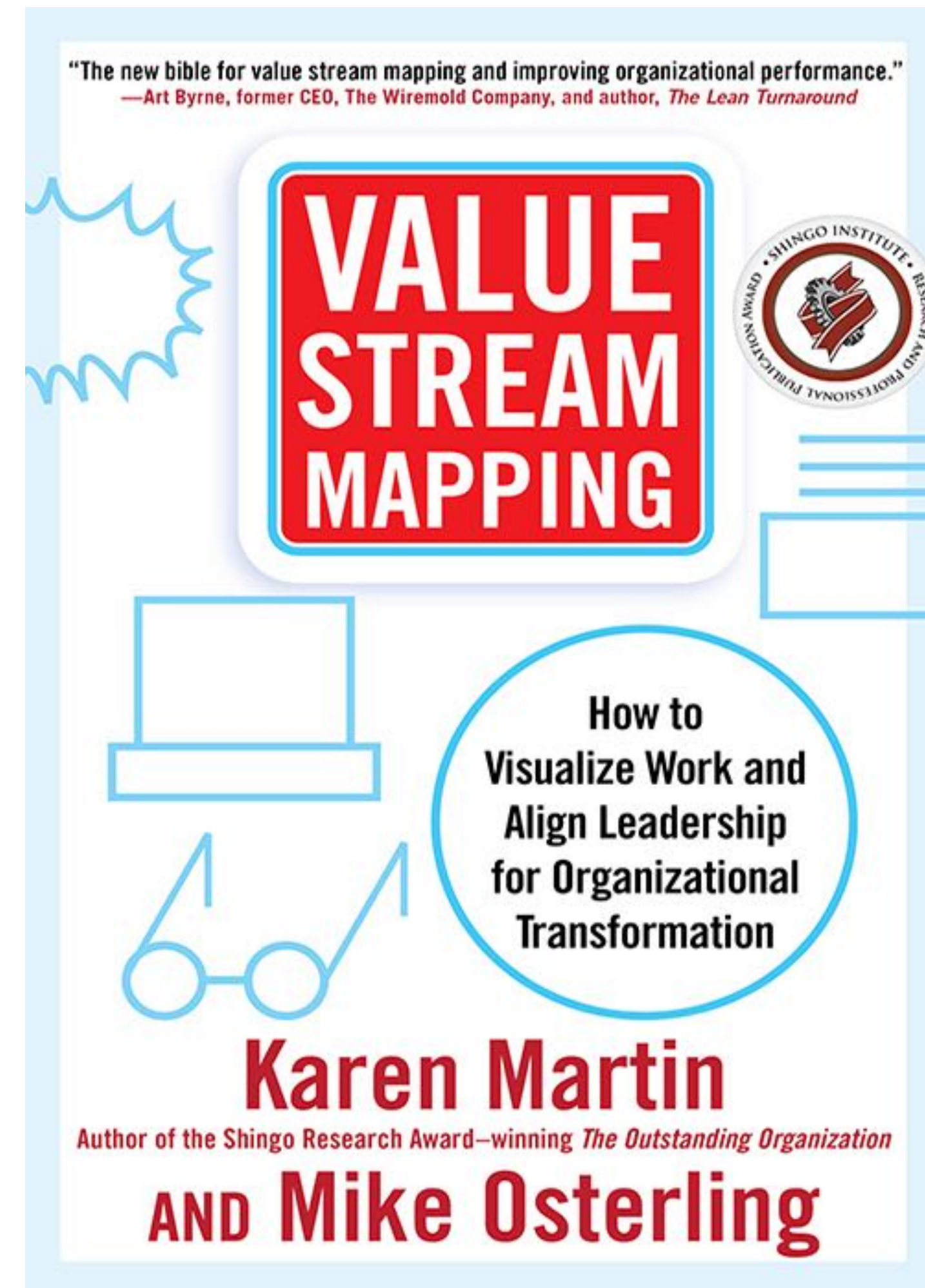
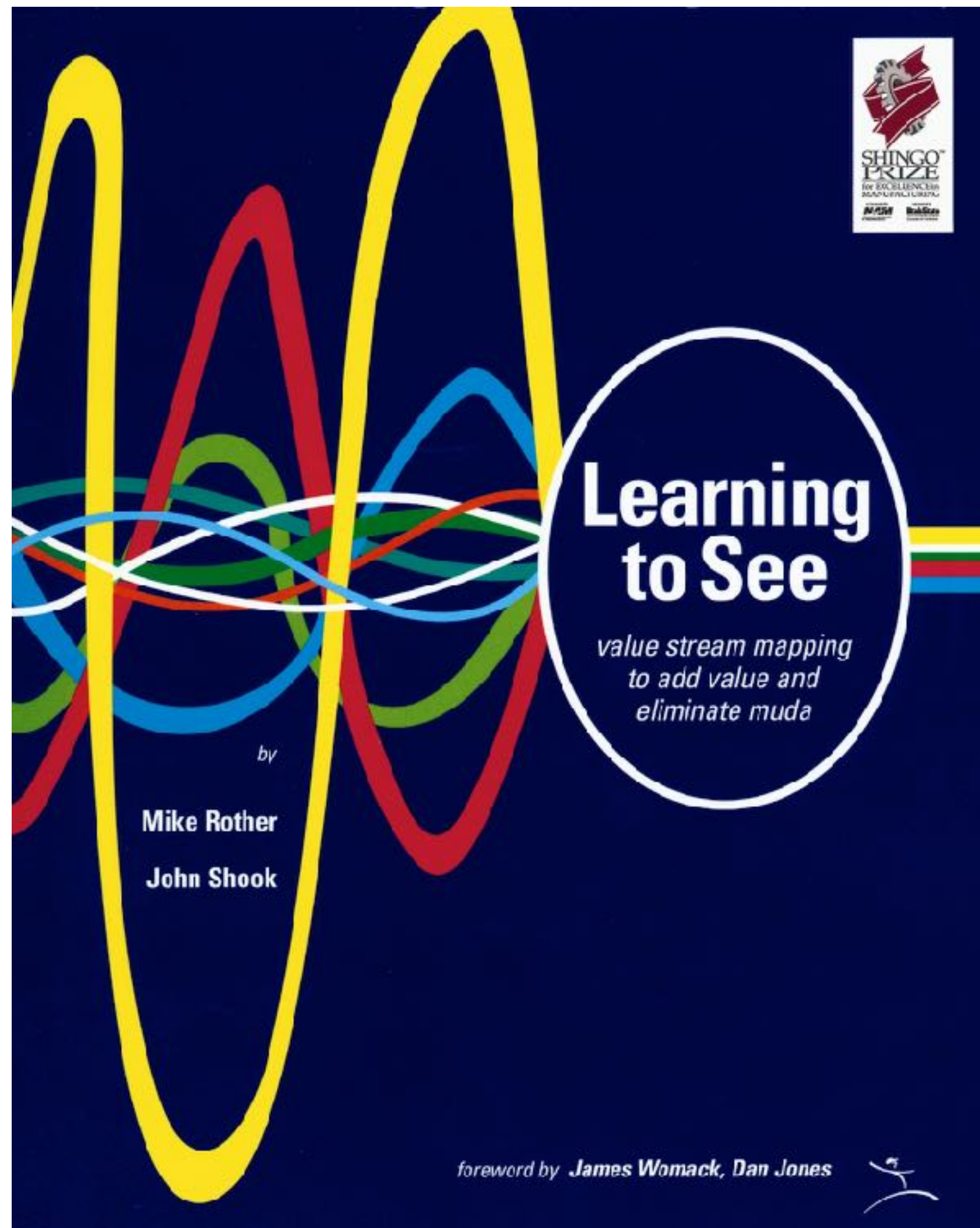


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**IF YOU CAN'T DESCRIBE WHAT YOU ARE  
DOING AS A PROCESS, YOU DON'T KNOW  
WHAT YOU'RE DOING.**

**W. Edwards Deming**

# WHAT IS VALUE STREAM MAPPING?



## PART OF A TRANSFORMATION PROCESS

Learning to See foreward by Womack and Jones:

1. Find a change agent (how about you?)
2. Find a sensei (a teacher whose learning curve you can borrow)
3. Seize (or create) a crisis to motivate action across your firm

*Many jump to Step Five:*

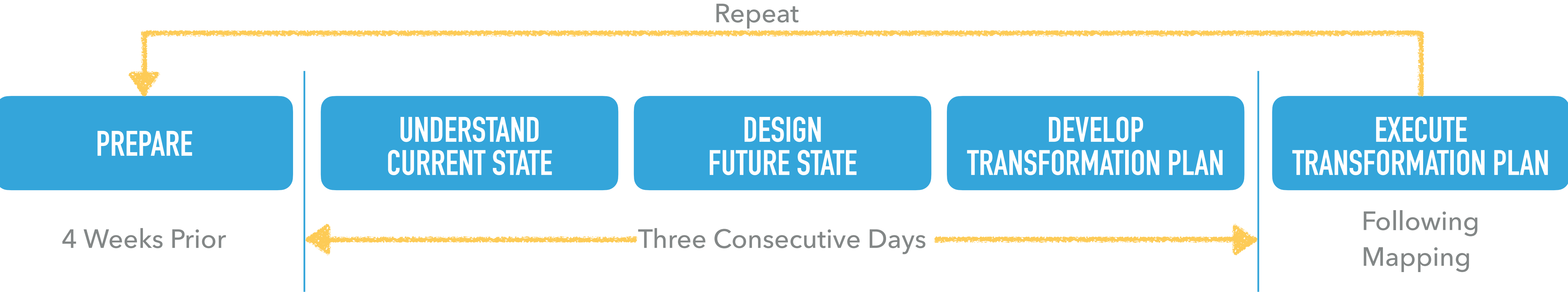
5. Pick something important and get started removing waste quickly, to surprise yourself with how much you can accomplish in a very short period

*Yet the overlooked Step Four is the most critical:*

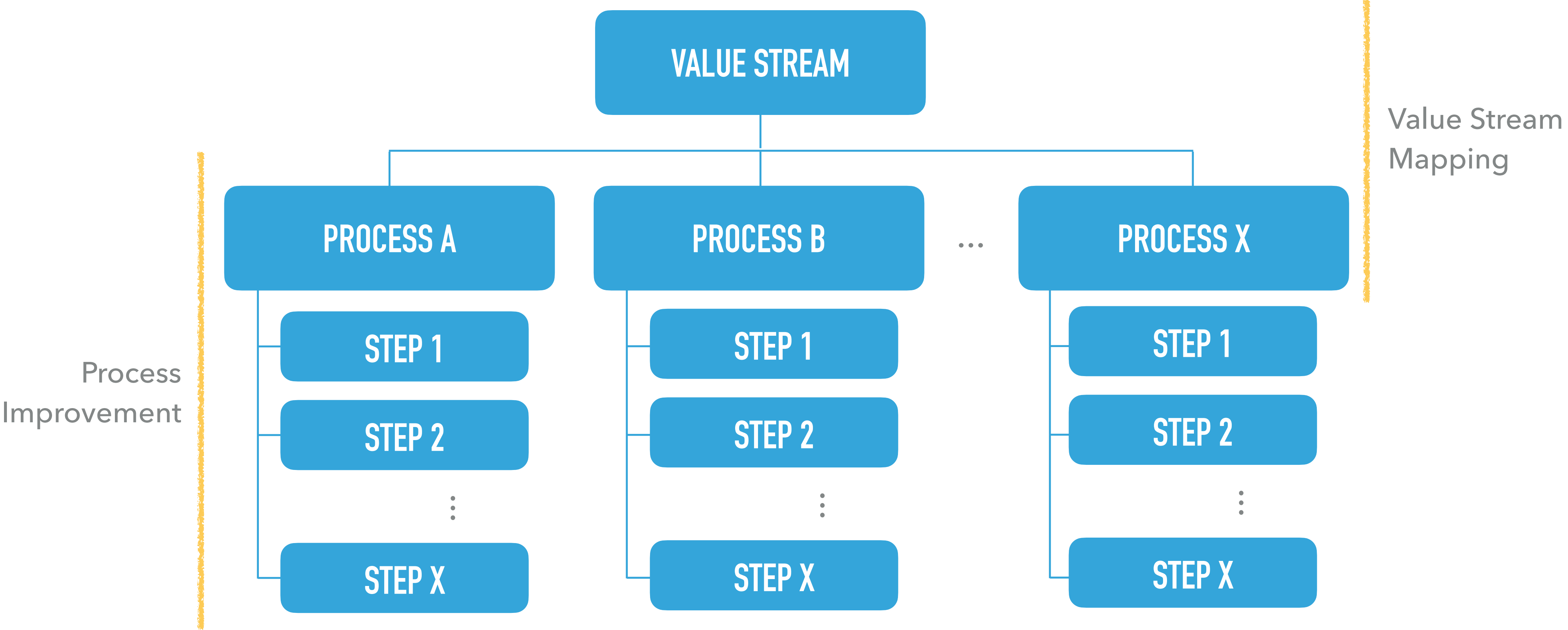
4. Map the entire value stream



# THREE PART PROCESS



# DIFFERENT FROM PROCESS MAPPING



# KEY PLAYERS

- ▶ Upper Management: Executive Sponsor and VSM Champ
- ▶ Facilitator
- ▶ Mapping Team
- ▶ Subject Matter Experts, Logistics Support
- ▶ Briefing Attendees
- ▶ Where do you fit in?





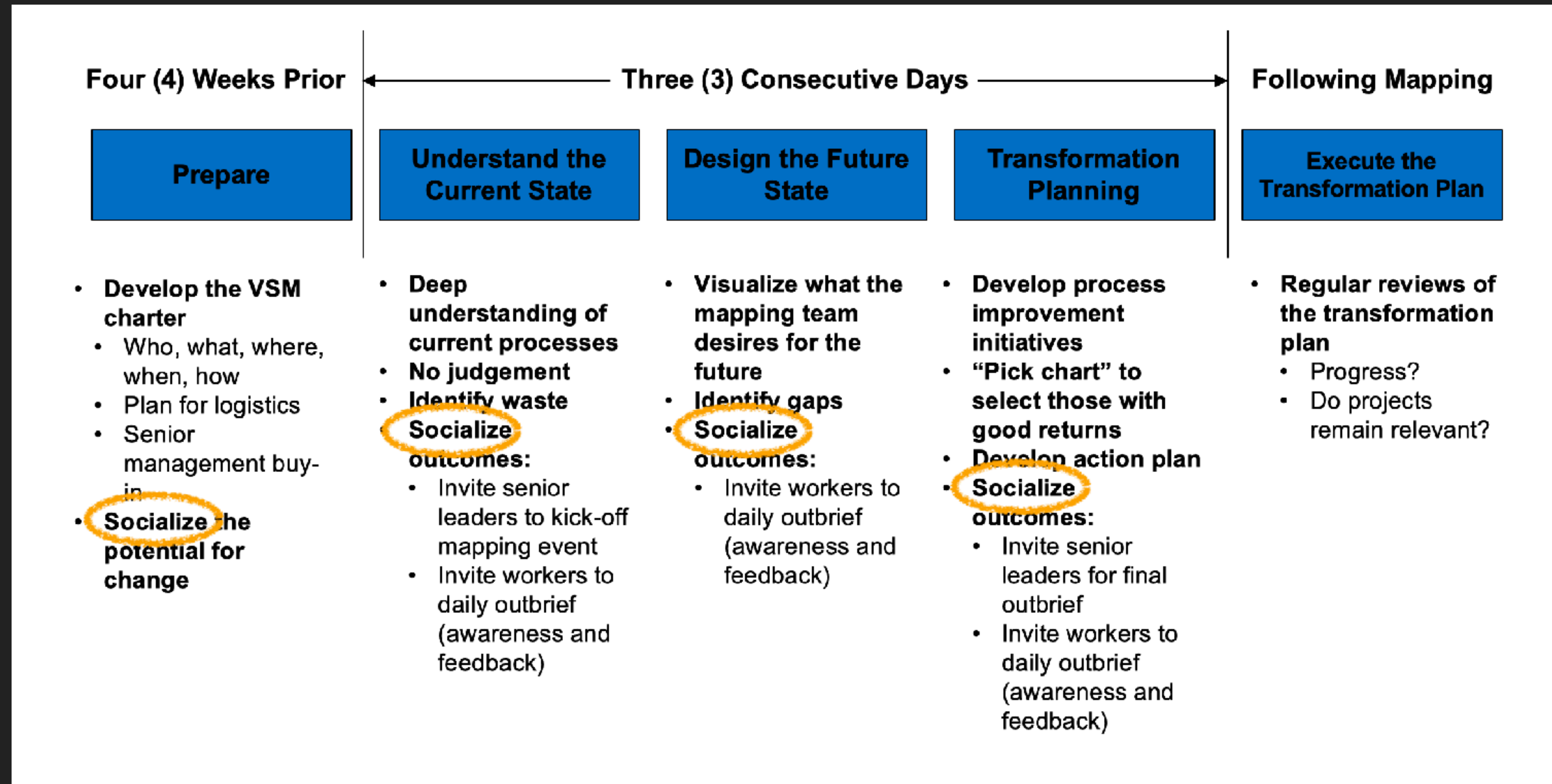


**FACILITATOR OR  
LEADER?**

**FACILITATING LEADER**



## GOAL: BUILDING TRUST





## GOAL: BUILDING TRUST

- ▶ More than a meeting
- ▶ Talk with people
- ▶ Will be affected by change
- ▶ Socialization is baked into VSM: Don't miss any opportunities!

# EVERYONE DOESN'T SEE PROCESSES LIKE YOU

1. Teach every technique
2. Learning is part of Current State Mapping
3. Be ready to teach next steps



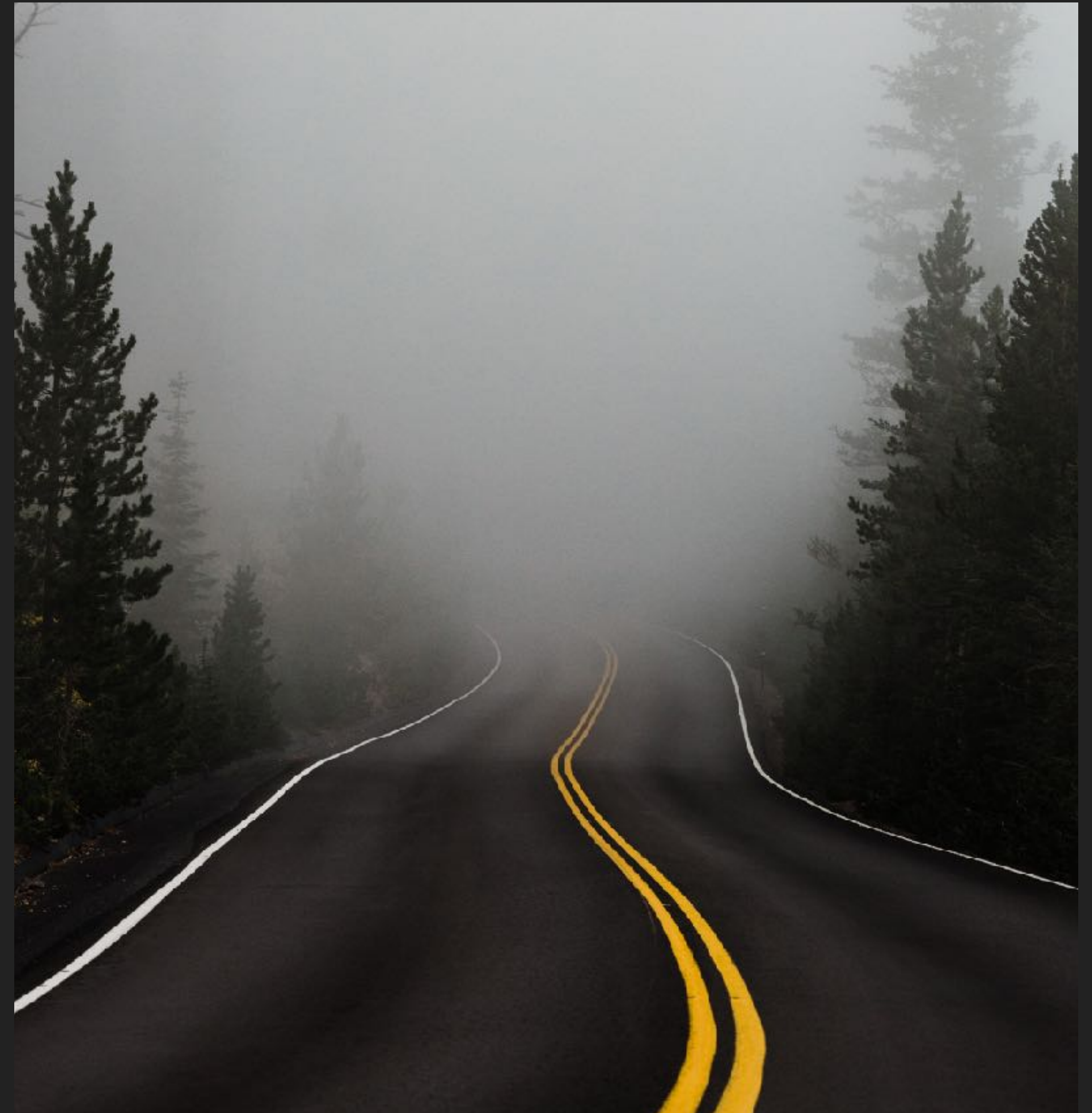
## #3: HAVE A CLEAR, WELL-WRITTEN CHARTER

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### A ROADMAP

Elements of a good charter:

- ▶ Measurable goals
- ▶ By name, unambiguous roles
- ▶ Benefits to customer/organization
- ▶ Logistics details



#3: HAVE A CLEAR, WELL-WRITTEN CHARTER

A FORMAT TO FOLLOW

Value Stream Mapping Charter					
Scope		Accountable Parties		Logistics	
Value Stream	Value stream being improved	Executive Sponsor	Required: typically VP or C-level	Event Dates & Times	3 days typically; consecutive is best; 6 hrs per day minimum; 7 or 8 hrs is best
Specific Conditions	What circumstances are included and excluded? (e.g., type of customer, geographic location, etc.)	Value Stream Champion	If needed—often director or manager level		
Demand Rate	How many times is this done per wk, qtr, mo, or yr?	Facilitator	Required: skilled, objective person leading the activity	Base-camp Location	On-site, ample wall space, quiet/private location
Trigger	What initiates the process?				
First Step	Task on first process block	Logistics Coordinator	Not always needed	Meals Provided	Always a nice touch; keeps the team from wandering
Last Step	Task on last process block				
Boundaries & Limitations	What is the team NOT authorized to change?	Briefing Attendees ** required *optional	List the people that are required to attend the briefings (**) and those whose attendance is optional (*).	Briefing Dates & Times	Aids in consensus building and organizational learning. Typically the last hour of the day.
Improvement Time Frame	Typically 3-6 months				
Current State Problems & Business Needs		Mapping Team			
1	What's driving the need for improvement?		Function	Name	Contact Information
2		1	Leadership-heavy		
3		2			
4		3			
5		4			
Measurable Target Condition		5			
1	Reduce <defined metric> from X to Y (Z% improvement).	6			
2	Increase <defined metric> from X to Y (Z% improvement).	7			
3		8			
4		9			
5		10			
Benefits to Customers		On-Call Support			
1	How will internal and / or external customers benefit as a result		Function	Name	Contact Information
2	of improvements to the VS?	1	SMEs that may not be needed full time		
3		2			
4		3			
5		4			
Benefits to Business		Agreement			
1	What other benefits will the business or internal customers realize as a	Executive Sponsor		Value Stream Champion	Facilitator
2	result of improvements to the VSM?				
3		Signature:		Signature:	Signature:
4		Date:		Date:	Date:

► <https://tkmg.wpengine.com/wp-content/files/Value-Stream-Mapping-Charter-KM-v13.xlsx>



# NEED SUPPORT FROM THE TOP

- ▶ Interest
- ▶ Removes roadblocks
- ▶ Energizes the team
- ▶ Communicates with executive leadership

### TIPS ON KEEPING THAT SUPPORT

- ▶ Consistent progress updates
- ▶ Make good products (charter, maps, etc.)
- ▶ Offer opportunities for engagement
- ▶ Point out roadblocks and ask for help



## #5: DON'T BE AFRAID TO CHANGE THE PLAN

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# IF THE PLAN DOESN'T WORK, CHANGE THE PLAN, BUT NEVER THE GOAL.

- ▶ New data vs. team distraction
- ▶ Assess and re-assess the ROI for your projects
- ▶ Useful tool: Pick Chart
- ▶ Make it a deliberate decision
- ▶ Communicate with the team

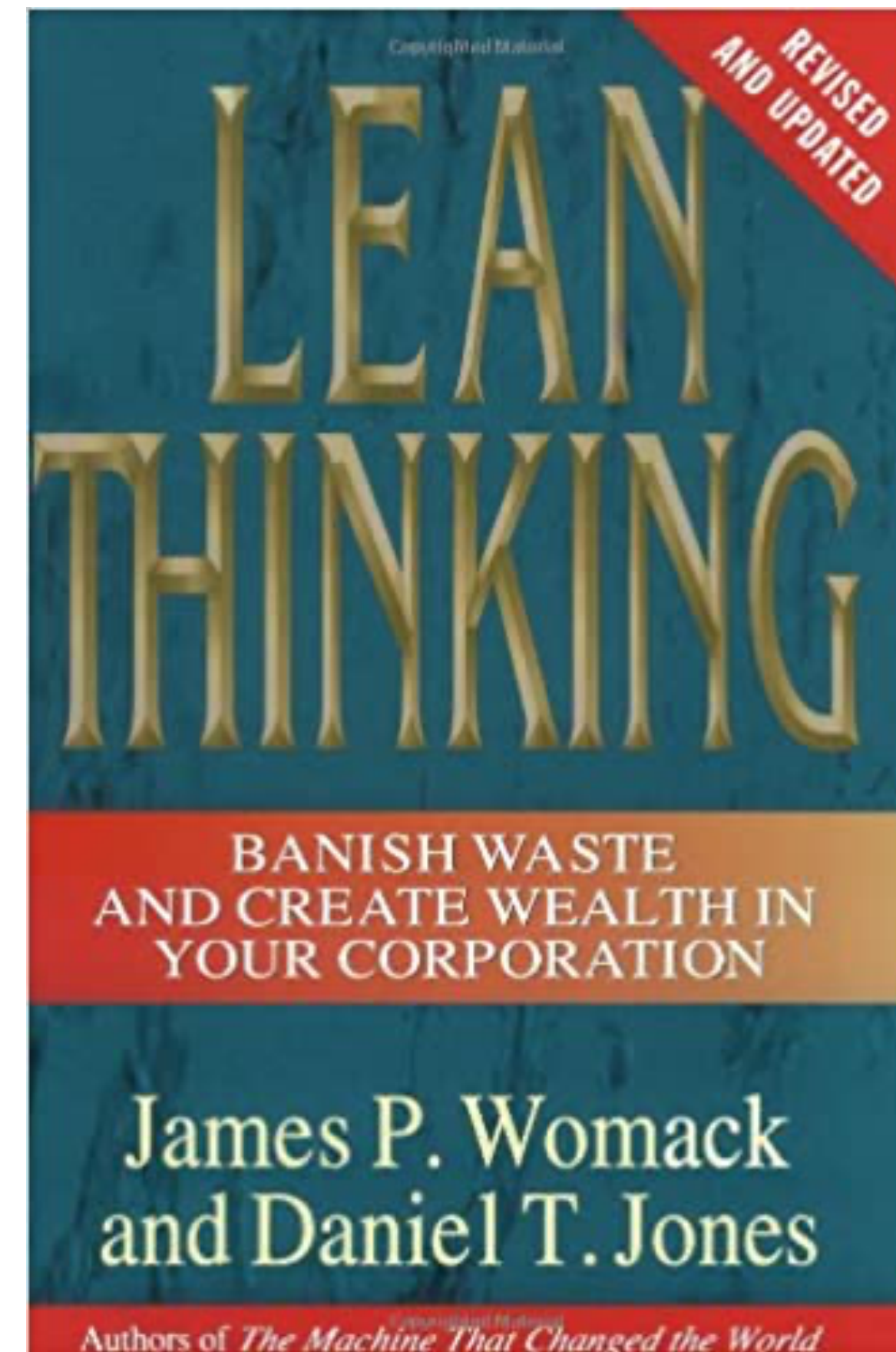
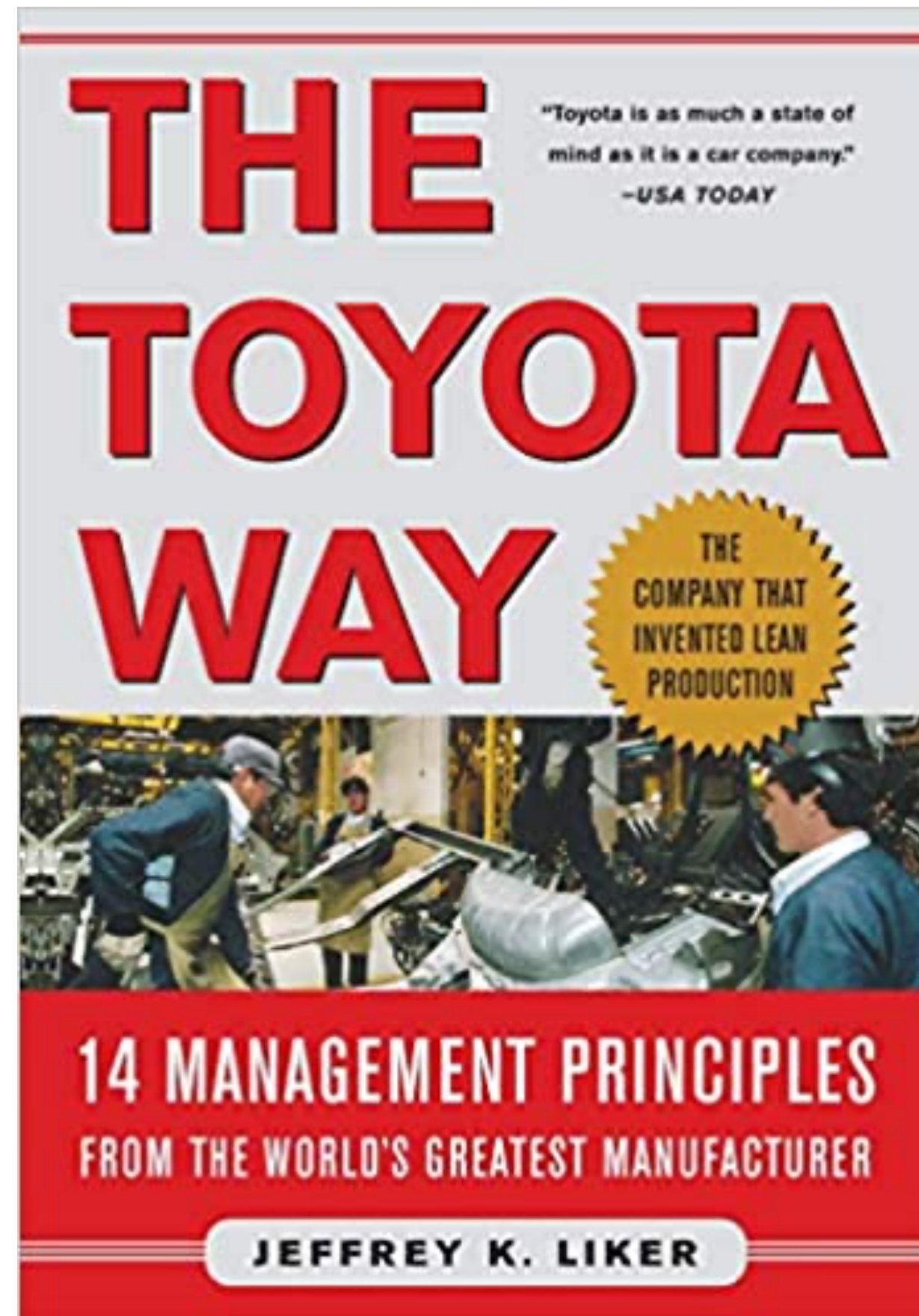


# FIVE VSM BEST PRACTICES

1. Socialize, socialize, socialize!
2. Be a teacher
3. Have a clear, well-written charter
4. Keep your champion engaged
5. Don't be afraid to change the plan

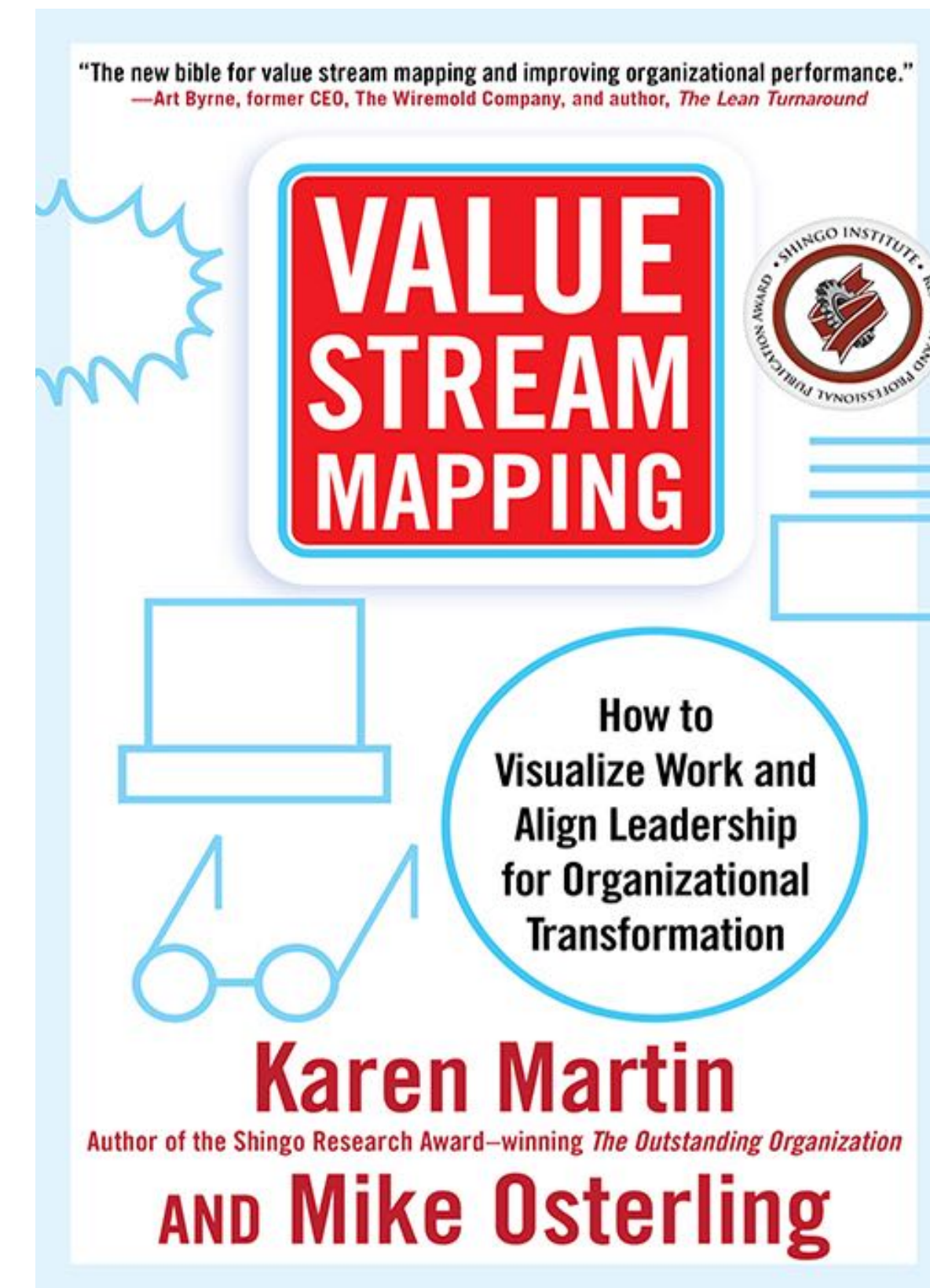
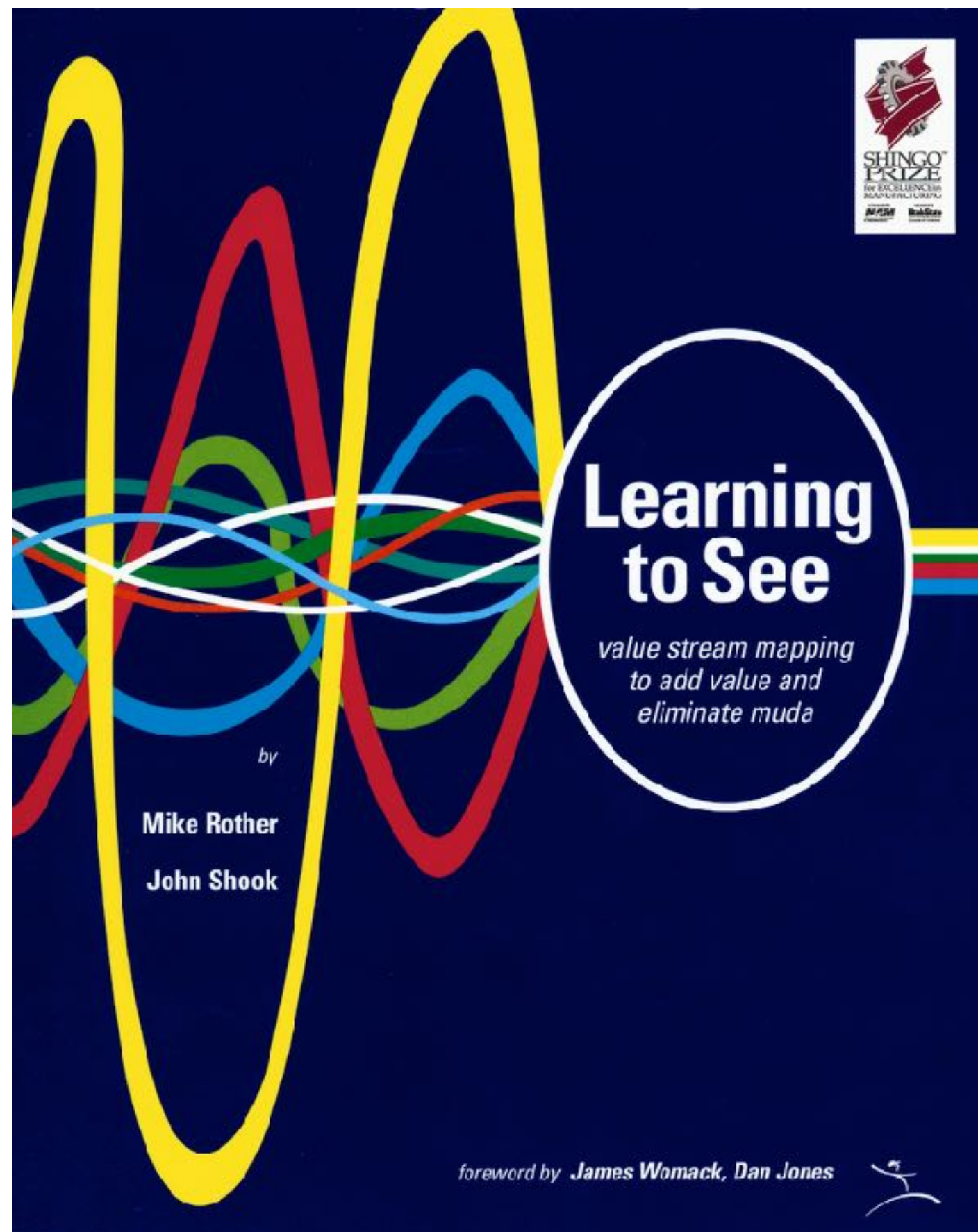


# LEARNING ABOUT LEAN





# LEARNING ABOUT VALUE STREAM MAPPING



<https://tkmg.com/books/value-stream-mapping/>

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