

Process Roadmap 101

A Process Roadmap helps you accomplish a specific goal (or series of goals), such as organizing a group project, or resolving an issue that requires input from many parties.

The following template can be used in such activities when you are exploring items, especially those that require some form of consensus in order to progress.

Note: You will need to modify this template according to the situation at hand.

What benefit does a Process Roadmap offer?

A Process Roadmap template provides direction for team members. In situations where there is no agreed roadmap, discussions may deteriorate into lengthy brainstorming sessions that produce very little real value.

Alternatively, the most vocal and persuasive team members may simply steamroll the other members into accepting their opinions.

Instead, the Process Roadmap provides a structure whereby the agenda can be discussed in a more productive manner.

The Process Roadmap explores:

- Who is involved in the activity?
- Why does the activity need to be undertaken?
- What are the impacts of not undertaking the activities?
- How to gain benefits?
- Which guidelines need to be defined?
- What rules need to be established?
- How to reach the main objectives?
- How to evaluate the success criteria?
- How to capture what you've learned for future sessions?

This list is not exhaustive and should be revised depending on your requirements.

Process Roadmap Structure

The structure of a typical process roadmap is as follows:

Purpose — this describes the rationale for the activity, i.e. why you are holding the meeting. It explains the motivation behind the activity and outlines how the final outputs will add value to your staff, customers, and organization.

Goals — In relation to each activity, goals are set to reach the expected output? For example: a resolution to an internal issue or a decision regarding corporate policy.

Guidelines — these outline the rules for the group's behavior, e.g. not to interrupt when people are speaking, setting time limits on discussions, appointing referees to monitor mini-sessions.

Roles — this section determines the roles required for the group/session.

- Leader 'owns' the overall progress of the group.
- Facilitator is responsible for the meeting's process.
- Participants are required to contribute to the session.
- Other roles are determined as required.

Plan — this outlines the steps required to fulfill the high-level objectives; you can also discuss the resource requirements and identify the individuals involved.

Feedback — the final section discusses the effectiveness of the overall group/session, e.g. did you reach your goals. You can also capture any 'lessons learned' here to share with other and refer to in future sessions.

Did you find this useful?

You can learn more about this subject at: www.klariti.com