Process Mapping Facilitation How-To Guide: Tips and Tricks

If you're new to facilitating, it may be helpful to have someone present to act as scribe during your session to help capture ideas, while you manage how the exercise is running "in the moment". This will allow you to make sure all present are being heard, and able to contribute. Co-facilitating a session with a member of staff experienced in facilitation, but not necessarily the clinical topic, may also work well.

1. "Planning is everything"

- Ensure all participants have received a brief or agenda for your session in advance so they can come prepared with ideas
- Ensure this agenda contains your goal or aim for the session
- "The why" – keep this patient focussed in your brief, as this will help unite participants if you are taken off track on the day
- Ensure you have name stickers or ensure everyone's ID badges are visible so everyone is known by their name
- Environment – if you are going to use a table ensure chairs are spaced equally without any single individual sitting at the "head" or in a position of perceived authority
- Plan breaks/refreshments into your half day / day and make it clear when these are going to be
- Keep to time

2. Format

- Ensure there is a short introduction at the start of your session include:
  - Why you're doing this session
  - What you're hoping to achieve

- What will happen afterwards
- Make sure everybody introduces themselves, one by one, this should be short and snappy e.g.
    - Please give your name, role and two things you like about working for this organization – use yourself as an example
    - Tell me who you are and why you are here, using the structure "My name is, and I'm here to….", - again use yourself as an example
- Set the ground-rules for the day:
    - Listen to each other
    - Everyone has an equal voice
    - Don't talk over each other
    - Say if you don't understand
    - Say if you don't agree
    - Be honest
    - Suspend judgement – this is about understanding and finding solutions
    - Not about right or wrong – keep focussing on AIM, if you consistently link this to improving quality for patients it should be a key diffuser if any disagreements escalate

3. Content

- Explain the use of materials available for your Process Map/Driver Diagram
- Process Mapping:
    - Focus on what is happening in reality 80% of the time, NOT what should be happening or what the protocol says
    - Don't forget to use the Car Park list if there is an issue or disagreement that cannot be resolved. If discussion lasts >10mins on a particular step without resolution consider using this to park the issue and move on
    - If ideas for improvement arise before you finish the map consider using an "Idea List" to go back to when the map has been completed. This avoids losing that concept without the risk of being side-tracked
- Brainstorming:

- Emphasise that this is to generate ideas, not evaluate them, particularly in "Analysis" stage of Process Mapping or Initiating your Driver Diagram session
- If you're facilitating AVOID the temptation to evaluate ideas as they're generated as good/bad/ugly as this may discourage others to contribute
- If there is a large group >6, separate into two groups and ask them to generate ideas give 15-30mins for this before re-uniting
- Make sure every idea is written on a post-it note and added to the list, particularly in Driver Diagram generation, before grouping and "drivers" are identified

- To diffuse disagreement amongst participants if escalating
  - Do not respond directly in agreement or disagreement, instead refer to the "ground rules" set out in the beginning & re-iterate aim of session
  - Be prepared to adjust agenda for coffee/comfort break if needed to diffuse

4. Questions

- To initiate discussion:
  - "Which aspects of the pathway work well…"
  - "What parts of the pathway/ care are you unhappy about…"
  - "Tell me about one good experience you've had ……"
  - "Can you give a recent example of when …… worked well/didn't work so well"
- - To clarify
  - "What makes you say that……?"
  - "Why do you think that happens….?"
  - "Can you say on reflection what was particularly impressive about…?
  - Echoing responses "Unfriendly?", "Difficult?", "Slow?"