

## PROCESS OPTIMIZATION LAB: WORKSHEET

### STEP 1: CHOOSE WHICH PROCESS TO OPTIMIZE

*We're choosing a process where better collaboration would immediately improve outcomes.*

**Process name:**

**Why we picked this process (check all that apply):**

- Work gets stuck or delayed
- People complain about it
- Handoffs feel messy
- Rework or fixing later
- Members / providers feel the impact
- Other \_\_\_\_\_

**Who touches this process?**

*Include people, teams, or roles—even if they're informal or invisible*

**STEP 2: MAP OUT THE PROCESS**

**Start:** \_\_\_\_\_

**End:** \_\_\_\_\_  
(customer + "done")

Draw the steps below (5–9 boxes max).

### STEP 3: ANALYZE THE PROCESS

#### Where Does Friction Show Up?

Put a dot on your map, then answer:

Which step feels the messiest?

What's happening there (in plain language)?

#### Write a Problem Statement

Right now, the way we work together causes...

That leads to...

If we fixed this, it would feel like...

#### Uncover Assumptions

*Many process problems persist because we treat opinions and guesses as facts.*

Facts (verifiable, observable, data-based):

Opinions (judgments, interpretations, beliefs):

Guesses (assumptions about intent, motives, or future outcomes):

#### Uncover What I Can Influence

Ask "Why?" 5 times until you hit something you can influence. Stop when the next "why" would require someone else to change first.

Choose One Small Improvement

Smallest change we could test:

What would look different next week?

How Will You Know This Helps?

- Waiting between steps went down
- Rework dropped
- Handoff got cleaner
- Other: \_\_\_\_\_

**Who will notice this change first?**