



A collaborative platform for operational digital transformation projects

Digital Transformation Workshop Guide

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Workshop materials checklist

- ✓ **Guidebook** - This guidebook will walk you through each step of the Operandy Digital Transformation Workshop. We recommend that you reach out to Operandy in order to prepare for your first workshop or get in touch with an Operandy workshop facilitator, email us at hello@operandy.com.
- **Slides** - This workshop includes a slide deck that is divided into 2 parts. The first part will help managers, project managers or project owners prepare for a workshop. The second part is used during the workshop in order to guide participants through the first session of the digital transformation process.
- **Spreadsheet workbook** - In order to document your work throughout the workshop and share it between participants or other stakeholders in your organization, we recommend using the spreadsheet workbook that you can download in the following formats:

Google Sheets: <https://bit.ly/2TjsZ3z>

Excel: <https://bit.ly/383kKxR>

Or

- **Operandy account** - Create a free account at operandy.com and work directly in Operandy in order to document your process and prepare for sessions 2, 3 and 4. This makes it easier to communicate your work across your teams and onboard technical team members into a digital transformation project.

Digital transformation and you

Are Google, Apple, Microsoft, Amazon and Facebook successful because they built great products?

The answer is clearly yes! But that's not the whole story.

A great product is the result of a culture based on methods, strategy, design and employee engagement.

Maybe you've worked on a product using agile, scrum or lean techniques; maybe you haven't. Either way, that's ok.

The Operandy Digital Transformation Workshop will help guide you in applying the strategies and methodologies used in some of the world's most successful tech companies to the transformation of your everyday operational teamwork.

Companies and organizations like ENGIE, L'Oréal and even the French Army have used Operandy and this workshop to completely redesign their organizations.

Are you ready to start the journey of transformation at your company?

Let's get started by digging into some of these basic concepts!

So what exactly is digital transformation?

The concept of digital transformation has been applied to many aspects of change in organizations from building innovative products to updating internal tools.

Today, organizations are much more experienced in technology, meaning that definition of digital transformation can remain broad, while offering a specific context. When we use the phrase digital transformation we're referring to:

- 1) Converting manual or physical actions into actions that take place on digital tools and apps;
- 2) Automating tools and apps in order to handle low-value, repetitive work that was previously done manually.

Operational project

Until only recently, the term digital transformation was used broadly to refer to a company's efforts to transform both client-facing services and internal tools into digital formats.

When we refer to operational projects, we're specifically considering programs, projects and processes related to the internal, operational work done by a single team or work that's done across several teams in order to accomplish a job.

Process

We've found that the best way to approach operational projects is by thinking of them as processes. So a process is just a series of tasks, steps or actions that guide work from a beginning state to an end state.

Thanks to this broad definition, a lot of what teams do can be covered by a process-driven approach to operational project transformation.

The most basic components of a process are actions. They describe what is done, the roles or stakeholders involved in the doing and the tool(s) those stakeholders rely on.

Optimization

Because we can describe processes with just a few basic components, when we talk about optimization, we're really referring to three main principles:

- 1) **Organization** - the way a process is designed to handle a constant flow of work without interruption;
- 2) **Order of execution** - the relative order in which actions are completed;

- 3) **Digital transformation** - the conversion of actions from manual to digital or automatic.

Throughout this workshop, you and your colleagues will write down the specific actions you do in order to move work forward.

This approach to documenting your work will:

- 1) Give you the ability to analyze your current organization;
- 2) Offer visibility into the order in which you complete actions;
- 3) Help you measure the value of each action;
- 4) Assist you in imagining the different ways you can digitize or automate each action.

What you need to know

The link between Operations and IT

This workshop is the fruit of more than 3 years of collaboration with some of France's largest companies.

The challenge you face today, even as part of an ambitious organization, is not one of transformation, digitalization or automation. Rather, it's about communication!

Operandy's approach to digital transformation is, in the simplest of terms, a way to align non-technical and technical teams on translating real operational needs into technical language.

The reason why this is so important is because it speeds up the time it takes to go from a problem to a useful and usable solution.

As an operational person, you know your work better than anyone else. But sometimes, it's difficult to describe the improvements and changes that can help you work better.

Today, you'll have an opportunity to describe the work you do. Your description will enable a technical team to support a transformation strategy that reduces the number of boring and mundane tasks you manage, empowers you to make better, more informed decisions and frees up time for you to focus on creative and strategic projects where digitalization and automation won't add value.

What to expect from this workshop

The Operandy approach is 100% about usefulness, efficiency and actionability. But we also want to make sure that human value remains at the core of the work experience.

When you've completed this workshop, you'll have 2 deliverables:

- 1) **Operational process documentation** - a reference and single source of truth about how a recurring process is actually done;
- 2) **Functional specifications** - the beginning of a detailed technical document that an IT team can use to define and build a technical solution for you using data and your existing tools.

Where to begin: choosing a process

There are frictions, inefficiencies and frustrations all around us. Can you remember the last time you felt unmotivated to complete a task? Are there times when you've thought your work could be done better with a few tweaks? And when you have thought of making your work-life better, have you ever felt overwhelmed by how to do it?

We have a few guidelines that will help you choose what to work on, where that work should begin and the real change you'll be able to feel when it's all done.

Repetition

The biggest factor to account for is the number of times you do a job. In order for an investment to be "worth it," frequency must be at the core of digital transformation.

The more times a process is run each month, the more the process becomes mundane. Most humans get bored by repetition. And while repetition helps us practice and improve, it can also make us complacent and unattentive.

Time

You know it already, but the most limited resource we have is time. If you feel like you don't currently have enough time to complete all of your assignments and responsibilities, some of your work probably does take up too much time.

When we refer to time, we consider aspects like waiting - for a page or app to load, for someone else to complete their job so you can pick up the relay, or tasks that involve a lot of going back and forth between physical spaces or multiple applications, tabs and pages in your digital workspace.

Copy-paste

A lot of the work we do, especially in older companies requires us to move information around. Most of the time we do this kind of work because it's simply how it's always been done.

The advantage you have today is that your organization has made investments in its technological infrastructure and how it handles data.

Of course your technical colleagues aren't aware of all this copy-pasting you do in your daily life. They do likely have a solution, however. Moving information from database to a spreadsheet or from a spreadsheet into a CRM is so much simpler than it was just 3 or 4 years ago!

Handoffs

We don't work in silos. Most of our work involves multiple stakeholders, each adding value to a process through a unique skillset, expertise or knowledge.

In order to facilitate collaboration in the work environment, today we spend a lot of time, writing emails, organizing meetings, pinging team members by chat or even just walking up to a colleagues desk to chat it out.

While verbal and written communication are necessary for comradery, team cohesion and understanding, a lot of our communication is purely procedural.

Precise calculations

We can do some calculations in our heads, others on a calculator, maybe some more complicated ones using formulas in Excel and even the most complicated ones with Excel macros, or microprograms.

Calculations take time and require us to be 100% sure of the result. Sometimes we recheck our own math; other times we ask others to verify them. We usually write down the result as a reference and sometimes we even write down the math to make sure we know how we got the result.

All of this takes time and adds risk into the process. If you feel stressed about making decisions based on estimates, then your process might be a good candidate for this workshop.

Decisions

Decision making is at the heart of human value. Human judgement and machine judgement are incomparable, especially when external, immeasurable factors are in play.

Processes that require decisions can also make good candidates for this transformation workshop because processes can be designed and optimized to assist human decision-making.

Decisions require transparent, clear and organized information in order to reduce the risk associated with a course of action. Because of this, digitalization and automation can be helpful in supporting some of the most critical aspects of human value creation.

Conditions

Lastly, conditions and rules help guide work in different directions. Conditions act much like decisions, except that they're naturally automatable because they are objective.

If you're a banker and your loan policy requires a 10% down payment for a mortgage, the criteria is objective. You might make a decision about lowering that requirement, but you'll always have an objective point of reference.

So if your process uses rules and conditions that guide work forward, you might also consider them as good candidates for digital transformation.

Most processes include many or all of these aspects. Of course, if you evaluate each of these criteria individually, you might conclude that none of your work is really worth transforming. But, if you consider all of them holistically, you'll likely find that most of your work can be transformed to improve your work-life.

So where do you start?

Use the following table to write down the name of the process. For each process, write down a score between 1 and 5 for each of the process criteria. Add the scores up to get a general idea of which process might be the best one to use in this workshop.

Exercise 1: Prioritizing process candidates

Process name	Repetition	Time	Copy-paste	Handoffs	Precision	Decisions	Conditions

Selecting participants

Almost all processes are collaborative. You most certainly have extensive knowledge about your own responsibilities, and you may have deep knowledge about your team's work and even other teams' work. However, you will likely encounter gaps in that knowledge.

Once you've selected the process you want to work on, you'll need to think deeply about the people you need around the table in order to get a complete 360° view of what happens during the process.

There are 2 reasons why participant selection for the Operandy Digital Transformation Workshop is important:

- 1) Finding consensus on how actions are completed by people in the same role with the same responsibilities;
- 2) Adding the details of actions that only your colleagues are able to provide because of their specific knowledge.

The best way to list the stakeholders you'll invite to the workshop is by first thinking of the teams, departments and services involved in the process.

Once you've listed these groups, you can then attach the operational people whom you work with. If you're not sure about who the right person to invite from a different service is, ask your colleagues that work with those service or contact a manager of the service and ask for suggestions.

Exercise 1: Listing workshop participants

Service, department or team	Name of colleague

General guidelines to get things done

You're not 100% sure about how your process works

If you're working on a new process or if you've never tried to structure the process you'll be working on, there are three simple steps to achieve consensus quickly.

These are general guidelines, so we'll show you how to apply them when you begin the first workshop session.

- 1) Diverge - each participant brainstorms individually and writes down their ideas separate from the other participants;
- 2) Converge - participants bring together their ideas and discuss where they diverge in order to agree on a shared version;
- 3) Vote - each participant is allocated 5 votes that they can allocate to the version or versions of the process that they prefer.

You're really sure about how your process works

Some companies like those in industrial production already have processes in place. Sometimes these processes are already documented as Word documents or PowerPoints. They may have varying levels of detail, or they may have not been updated as a process evolves.

If this is the case for your process, you and your colleagues already have a minimum level of consensus on the modus operandi.

To tackle processes like these ones, you might choose to skip the divergence, convergence and vote approach in order to move more quickly.

As you discuss with your colleagues, you can come to a quick agreement and record your consensus directly. This more flexible approach will help you document more actions during the workshop.

But be careful! If you doubt your team's ability to achieve quick consensus, take your time and use the first approach described above. You may end up documenting less, but you'll be sure to get a quality result!

Session 1 - Process documentation

Let's get started!

Processes can be intimidating. Processes can be boring. Processes can feel like a waste of time. We totally feel you!

For most of us, they are not an exciting topic, and we tend to think they require a looooooot of effort.

The Operandy team has worked on tons of processes, so we understand your pain. For this reason, we wanted to make them easier, quicker and more fun to work on.

When you document a process, you should feel a sense of satisfaction because you know that you're going to get a tangible benefit for the time you spend on them.

This is our promise:

In less than 4 hours, you will have a complete, detailed view of how you run a process. And because of your effort, you'll already be able to think of a bunch of creative ways to improve your work routines with and without technology.

Modules

- **Welcome** - Your facilitator will begin the session with an introduction to the topic of processes and optimization, and introduce the process you've selected.
- **Participant presentations** - Go around the table and introduce yourself by giving their name, team and role, the frictions you encounter in the selected process and what you hope to get out of the workshop.
- **Methodology** - Your facilitator will present an approach for simplifying how to think about a process as a linear sequence composed of tasks, actions, stakeholders and tools.

- **Workshop guidelines** - Depending on the maturity of your process, you'll be asked to apply a either divergence-convergence approach or a unified collaborative approach as described in the first chapter of this guidebook.
- **Task workshop** - You'll break down the process into smaller parts by listing the main tasks or jobs that need to get done in order for the process to be completed.

Tasks

Tasks are the natural way we think about how things get done. They have the advantage of being both general and specific. They describe a group or series of specific steps that result in a major step of a process being completed.

A task refers to a context in which work is done to achieve an output that adds value to a previous task and contributes to the output of a next task.

Let's use a recruitment process as an example. You'll need to do things like source candidates, filter candidates, make a shortlist, contact shortlisted candidates to set up interviews, interview the candidates, come to an agreement on who to hire, select the best candidate for the job and make the offer.

Each of these steps can be considered a task. They refer to specific parts of a process, where each subsequent step builds on the previous one. We also understand the importance of each step, but can break them down into specific actions.

Now it's your turn! Can you break down your process into a series of tasks?

Hint: You can also use Operandy or the Excel spreadsheet that your facilitator downloaded with this workbook to do this exercise.

Exercise 1: List your tasks

1	
2	
3	
4	
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10	

- **Actions workshop** - For each task, you'll list the specific actions that need to be accomplished and associate roles and tools to each one.

Actions

As the operational person, you're the only person that can describe the specific nuances of the work you do.

In Operandy, actions refer to the smallest units of work and help break down tasks into smaller steps that can be analyzed and optimized individually.

Some actions are physical and manual while others are digital and automated. We can't stress enough that not all physical and manual actions can be or should be digitized. There is always value in human work.

To add to our previous example, let's go back to the recruitment process, specifically the last task of making an offer.

Perhaps there are physical steps involved with preparing the employment contract. You might describe them as “Print the contract,” “Walk to the photocopier,” and “Make 3 copies of the contract.”

You may also have some digital actions like “Open the the recruitment software,” “Search for candidates,” “Mark the candidate as hired,” and “Add offer information to the candidate profile.”

It’s important to be specific here. You can use the section above “Where to begin: choosing a process” to think about the actions that help your process move forward. Remember as well to keep things as linear as possible to start. You’ll get a chance later to make things more complex.

Tools

In order to get our work done, we might rely on physical gadgets, software, mobile apps, databases and sometimes even paper guides or knowledge bases.

A geographical surveyor might use a tripod called a total station for measuring; a surgeon uses a scalpel to cut tissue; a marketer uses email software; and a social media celebrity uses Instagram.

The nature of our work largely defines the tools we use. But the opposite can be true as well. The tools we use also impact how efficient our work is.

Imagine a surveyor using a yardstick; a surgeon using a Swiss Army knife; a marketer using paper mail; or an Instagram celebrity using a 35mm camera and a scanner. All of them might very well be able to do their work, but none of them would do it as efficiently as they would with the right tools.

Adding tools to actions helps reveal how well-adapted our toolsets are to the work we do. When we look at the documentation, we can think about better ways to use our tools, different ways of organizing our work or substituting inefficient tools for better ones completely.

At Operandy, when it comes to digital tools, we rarely introduce new tools. Between Google, Amazon, Microsoft and a handful of other companies, today, most organizations are well-equipped for work in the digital age.

As you'll see in the second session, the Operandy Digital Transformation workshop helps you discover how to better use the tools in your organization to relieve your stress and reduce the time you spend on boring, repetitive tasks by exploring how to better use your existing tools.

Stakeholders and roles

In process documentation, we try to be quite specific in describing actions and the tools they use. But when it comes to the stakeholders involved in those actions, we do our best to be general. Instead of referring to specific individuals, we use a concept called roles.

You can think of roles as you would think of job titles. Roles describe a group of people involved in a function. We describe stakeholders in this way so that process documentation can evolve. You will likely change jobs one day, but the processes you're involved in will likely still exist even if they evolve. So when you leave, your company can remove you from a role and add the person that replaces you.

Some roles are very much linked to a job title. This is usually the case for managers, directors and specialists. At the operational level, many of us wear different hats for different tasks and processes.

In human resources, the HR Director may vet and validate selected candidates or run selection meetings. As an operational person in human resources, you might have several roles like interviewer, talent manager and job poster.

Tips and tricks

In order to help you make the most of this workshop, here are a few tips and tricks that will help you describe your actions so that your colleagues and collaborators understand your work:

- 1) Name your actions by starting with a verb (open, copy, fill, delete, update, etc.);
- 2) Keep action names short. You'll be able to elaborate on them with descriptions later;
- 3) Think about physical actions, the buttons you click, the data you enter and the information you read in order to complete a task.

Use the following table to list all actions for the first task you listed in the previous exercise. For each subsequent task, repeat this exercise on an empty page of this workbook or on a blank sheet of paper.

Hint: You can also use Operandy or the Excel spreadsheet that your facilitator downloaded with this workbook to do this exercise.

Exercise 2: Actions for tasks

Task	Action	Role	Tool	Time	Importance

- **Measurement** - In order to begin valuing your process and the work needed to complete it, you'll learn how to associate a measurement of time to complete actions and a factor of importance to each one.

Measurement

Applying objective measurement to your process will offer you insight into its current performance, and highlight the actions where you can make gains by optimizing them.

This exercise will help you distinguish between actions where you can make quick wins from those that might take more time to optimize, digitize or automate.

There are 2 main criteria you'll use to list your priorities, notably the time spent to complete each action as well as your perception of each action's importance.

Time to complete

The time to complete an action is very literally the amount of time you estimate to move from one action to the next. As an experienced operational person, only you have the knowledge to be able to estimate the time you spend on different parts of your work.

It's highly important to be as accurate as possible when making these estimates, because they'll be used to calculate the gains you're able to realize for your individual role, your team and your company.

If you underestimate the time it takes to complete certain actions, they may be overlooked during the prioritization phase in the next workshop session. This may mean that some of your frustrating, boring or repetitive work will get pushed into future iterations.

Importance

The level of importance you attribute to actions is a representation of critical the action is. Some actions, especially those that require decisions are naturally important in order to ensure a high quality output.

You can use a scale of 1 to 5 to score the level of importance of each action. When prioritizing them, this score will be used in combination with the time to complete an action in order to define how eligible it is for digitalization, automation or human consideration.

Generally, actions that have higher scores will be associated with some level of human management. This is where you add the most value. Actions with lower scores are generally associated with low value and include work like copying and pasting, complex calculations and adhering to objective conditions.

Take time now to complete the table from the previous exercise. Add a time to complete and a score of importance to each action.

Hint: You can also use OperandY or the Excel spreadsheet that your facilitator downloaded with this workbook to do this exercise.

Exercise 3: Measurement

Task	Action	Role	Tool	Time	Importance

Next steps

Congratulations! You're done with the hard part!

If you haven't done so already, you can use OperandY or the Excel spreadsheet in this workshop pack to log and save your process.

In the next session, we'll begin prioritizing and optimizing your existing process in order to convert it into technical documentation for a developer or your internal IT team.

Don't worry though! No technical knowledge is required for any of the OperandY workshop sessions.

Your next workshop sessions will include:

- 1) Prioritization, frequency and feasibility
- 2) Orchestration, timing and order of execution
- 3) Digital actions and triggers
- 4) Scheduling and automated messages
- 5) Automated actions
- 6) Investment, ROI and gains
- 7) Action content, assignment, batched work and data
- 8) Diverging and merged sequences

If you're interested in getting the complete workshop guide to digital transformation for all 3 workshop sessions, get in touch at hello@operandy.com.



Want the full Operandy workshop guide or a custom workshop experience run by Operandy's professional process designers?

Get in touch

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