

Ideation in a Process Design Workshop



Point of View (POV)

May 2022

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What is Ideation, and why is it such an important part of process design?

- Ideation is defined as the formation of ideas and concepts
- When an organization embarks on an improvement project to repair, digitize, or transform a process, they often struggle with two key questions:
 1. Where do we start the journey?
 2. How do we know what the future state could be?



The start of the journey: Process Design Workshop

- Many organizations start the process design efforts with a workshop meeting attended by key stakeholders in the process and led by a skilled meeting facilitator
- Typically, stakeholders are very good at detailing current state problems but often struggle to articulate a vision for the future state other than quoting the features of some new technology they think they need
- The workshop provides a powerful platform for a skilled facilitator to guide the stakeholders through a formal process of generating new ideas in a collaborative environment where success is measured by the scope of ideas that become the building blocks of a solution



Ideation Technique: Brainstorming

Feature	Details
Objective:	Details of changes to meet challenges without constraints
Group Size:	3 to 6 participants
Facilitation Highlights:	<ul style="list-style-type: none">• All ideas considered• No limitations on solution components• Group edits their own work as they walkthrough ideas with all workshop participants
Outputs:	Post-it notes or flip chart lists of process and system component changes
Duration:	30 to 60 minutes



Ideation Technique: Crazy Eights

Feature	Details
Objective:	Quantity rather than quality of ideas for change
Group Size:	Individual participation no groups or teams
Facilitation Highlights:	<ul style="list-style-type: none">• Facilitator provides topic• Participant divides paper into eight sections• Quickly recording eight new ideas for change
Outputs:	Eight new ideas, sketches or graphical representation of changes
Duration:	5 to 10 minutes



Ideation Technique: Mind Mapping

Feature	Details
Objective:	Visual diagram of attributes associated with a current challenge
Group Size:	2 to 3 participants
Facilitation Highlights:	<ul style="list-style-type: none">• Different challenge assigned to each group• Group draws lines from central challenge to all major related elements
Outputs:	Fishbone diagram of all the major elements of the challenge elements related to challenge
Duration:	30 minutes



Ideation Technique: Storyboarding

Feature	Details
Objective:	Arranging and categorizing improvement ideas in a linear format
Group Size:	3 to 6 participants
Facilitation Highlights:	<ul style="list-style-type: none">• Use same ideas generated in brainstorming ideation exercise• Unique goal assigned to each group• Group arranges brainstorming ideas into linear format to tell a story about their solution from beginning to end
Outputs:	Storyboard on a flip chart of the components to the solution
Duration:	30 to 60 minutes



What do the workshop participants receive from the ideation exercises?

- Confidence that they can contribute to solution designing in a meaningful way even if they are not recognized experts
- Enhancement of communication skills to be both a leader and a supportive team member
- Developing a commitment to improving the work experience and effectiveness of all the actors within a process
- Embracing the friction between curiosity and solution advocacy necessary to build a better future state as a team



Value Delivery Focus Areas

Finance Process & Operating Model Optimization

- Order-to-Cash (OTC), Source-to-Pay (S2P), Financial Close
- Operating model design, SSC & BPO implementation
- Working Capital improvements in Billing, AR, Collections

Program and Project Management

- Program Management design and leadership
- Change management services

Digital Transformation

- Automation of core OTC and S2P processes

Service Delivery Highlights

Led team of 40+ consultants to document processes, lift & shift 200 roles to off-shore SSC

Designed Order-to-Cash internal controls to support SAP global implementation for technology company with \$24B in revenue

Led finance assessment of new acquisition in South Korea for leader in the automotive industry

Peter Fazio
Finance Transformation

Senior Mgr. Consulting

Business Unit Controller

SVP Finance

Auditor & Consultant

Business Unit Controller

Adjunct Professor

Infantry Officer

Finance Assessment

SSC Implementation

OTC Outsourcing

SSC Process Design

Operating Model Design

Acquisition Integration

Lease Accounting

Finance Process Design

Chart of Accounts

S2P Process Transformation

Joint Venture Implementation

Prior or Current Roles

Previous Client Work

