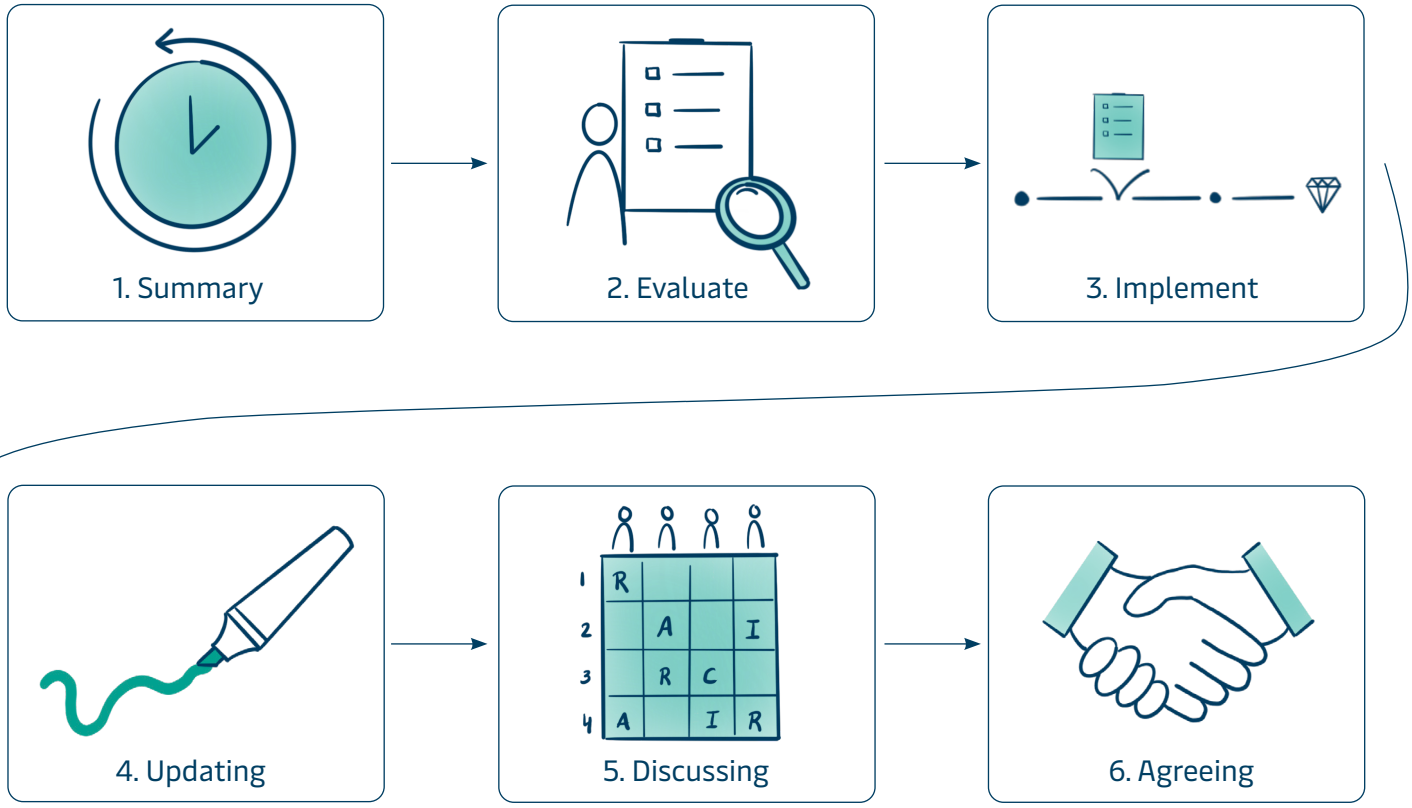
3

Integrated customer satisfaction

REFINE

Step-by-step explanation to host the third workshop


1. Summary
2. Evaluate
3. Implement
4. Updating
5. Discussing
6. Agreeing
R
A
I
R
C
A
I
R

Overview

During the third workshop, the aim is to create an aligned overview of the entire supply chain, including the activities, information exchanges, and responsibilities. An agreement is created through a RACI-matrix.

By evaluating the tasks stated in the Define Workshop, the participants can evaluate whether the tasks a good fit for the supply chain. After evaluating the tasks, these will be implemented in the supply chain, followed by updating the information exchanges and customer contact points.

When all these activities are mapped, the participants will go over a RACI-matrix prepared by the host to create alignment among the participants. This is followed by the participants discussing how they will use the matrix in their daily tasks and who will be responsible and accountable for this matrix.

This final workshop leads to overall alignment among the participants, improving the communication channels and, ultimately, leading to integrated customer service.

Total time

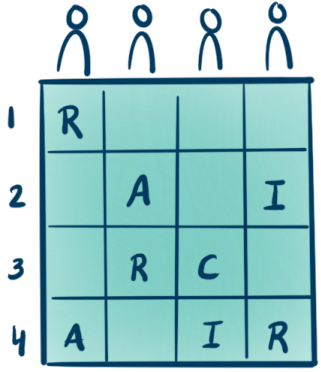
1,5 hour (you can schedule extra time if you want to include a break an/or energiser).

Materials needed

- A0 sheets
- Markers
- Post-its
- Flipchart
- Worksheet Templates 3.1, 3.2, 3.3, 3.4, 3.5, 3.6
- Written down goal in Workshop 1 – Part 2
- Map generated in Workshop 2 – Part 1
- Responsibilities of Workshop 2 – Part 6
- Process tasks of Workshop 2 – Part 7

Step-by-step

How to execute the Refine workshop



Preperation – Preparing RACI-matrix

Overview

Output goal:	Prepared RACI-matrix
Time:	30-60 min
Materials:	Template 2.2 filled out during the Define Workshop, Template 3.2 on A0-sheet

Purpose

During the Refine Workshop, the participants ultimately work towards an agreement. This agreement will be in the form of a RACI-matrix. However, it takes some time to create this. Therefore, the host prepares the matrix beforehand to speed up the workshop. The matrix can be created from the input derived in the previous two workshops.

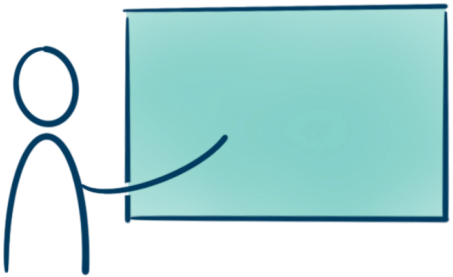
Step-by-step

1. Gather the outcomes of Template 2.2.

2. Use Template 3.3 for the RACI-matrix to keep Template 2.2 intact.

3. Start going over the activities and fill in the RACI roles per activity for the different departments (see example in overview booklet, Chapter 5).

4. Once the RACI-matrix is filled in, you might want to check it with another employee, but only if needed.



Intro 1 – Introduction

Overview

Output goal:	Getting all participants informed and aligned about the goal of the workshop
Time:	5 min
Materials:	-

Purpose

The introduction informs the participants about the goal of the workshop. This ensures that they all understand the goal and know what is expected of them. Furthermore, it also helps with setting their expectations.

Step-by-step

1. Make sure you put the goal and maps from the Explore Workshop (Part 2) and the Define Workshop (Part 1, 6, and 7) up on the wall.

2. Start with a recap of the previous workshop: what did you do and what was the result?

3. Introduce the goal of the workshop: During this workshop, we will evaluate the results of the first two workshops. These workshops focused on exploring the entire supply chain for customer X and its communication channels. In the Refine Workshop, we will specifically evaluate the tasks from the Define Workshop and create an agreement on how to work in this supply chain in the future.

4. Mention the atmosphere of the workshop: this workshop is meant to create an open space for ideas, so do not point fingers and listen to each other. Do not interrupt others.

5. Check whether there are any questions.

6. Move to Intro 2, where you start with an energiser.



Intro 2 – Warming-up

Overview

Output goal:	Warm-up
Time:	5 min
Materials:	Depending on the warm-up you choose

Purpose

Getting the participants warmed up. This ensures they have the right mindset for the workshop.

Step-by-step

1. Choose a suitable warm-up (overview booklet Chapter 6, creactor.nl, and sessionlab.com). For this workshop, it can be useful to start with a warm-up that lets everybody speak up or connect. This helps with evaluating, because participants need to feel comfortable sharing the experience with their tasks during the previous weeks.

2. Execute the warm-up.

3. After the warm-up, wrap up and explain that you will move on with the workshop (Intro 3).

Example

1. Ask the participants to count to 10 together. Only one person can say one number at a time, but the group cannot decide an order beforehand.

2. If two people say the same number, the counting starts at zero again.

3. When 10 is achieved, see whether there is time to increase the number to 15, or even 20.



Intro 3 – Learning expectations

Overview

Output goal:	Warm up and setting expectations
Time:	5 min
Materials:	A0 sheet with Template 3.1, post-its, markers

Purpose

As the workshop host, it is useful to get to know the participants' expectations, because this helps validate the workshop afterwards. By knowing the expectations, it can be seen whether these expectations match the outcomes, or whether the workshop did not address all relevant aspects. Additionally, if the expectations are far from what is addressed in the workshops, you can already adjust them slightly.

Step-by-step

1. Explain to the participants that in this workshop only one answer, problem or idea can be written per post-it. If you have a second idea, put it on a second post-it.

2. Ask the participants to answer the following questions: 'What do you expect to learn today?' and 'What do you expect to contribute?'.

3. Let everybody answer the questions by writing their answers on post-its and placing those on Template 3.1 on a A0-sheet.

4. Set a timer for 2-3 minutes.

5. Let participants briefly look at the answers and discuss a few interesting post-its.



Part 1 – Summarising the Explore and Define workshops

Overview

Output goal:	Reminding the participants of the outcome of the previous workshops
Time:	5 min
Materials:	A0-sheets from the Explore Workshop (Part 2), and the Define Workshop (Parts 1, 6, and 7)

Purpose

Three weeks after the Define Workshop, it is likely that the participants have forgotten some of the insights from the workshops. However, during the Refine Workshop, evaluation and iteration are the main goal. This makes it important to remind all participants of the previous workshops.

Step-by-step

1. Stand next to the templates on the wall of the Explore Workshop (Part 2) and the Define Workshop (Parts 1, 6, and 7).

2. Give a quick recap of the outcomes generated during the Explore and Define Workshops. This recap should be more specific than the introduction in Intro 1. It should highlight the biggest insights in chronological order.

3. End with the process tasks written down in the Define Workshop – Part 7.



Part 2 – Evaluating process tasks

Overview

Output goal:	Improved process tasks for the supply chains
Time:	10 min
Materials:	Template 3.2 on A0-sheet, post-its, markers

Purpose

The process tasks of the participants have to be evaluated to check whether they work or need to be adjusted. This part focuses on the experiences the participants had with their tasks and encourages them rethink the tasks to optimise them for the supply chain.

Step-by-step

1. Prepare Template 3.2 using Template 2.5 from the Define Workshop (Part 7).

2. Place the template on the table.

3. Ask the participants to answer the questions: “What did you experience with these tasks?” and “What tasks would you consider relevant to implement in the supply chain?”. Let the participants place their post-its on the template.

4. If they could not execute the process task, ask them to write down why they could not carry out the task and whether it would still be relevant.

5. After all participants have written this down, briefly discuss the insights with the group.



Part 3 – Placing tasks within the supply chain

Overview

Output goal:	Adjusted supply chain with implemented process tasks
Time:	5 min
Materials:	Template 3.3 on A0-sheet, post-its, markers

Purpose

The evaluated tasks have to be placed in the mapped supply chain to ensure implementation after the workshops. This also visualises when these tasks have to be carried out by the participants.

Step-by-step

1. Prepare Template 3.3 based on the outcomes of the Define Workshop – Part 1.

2. Ask the participants to place their tasks within the supply chain. They can put their post-its on the template.

3. Ask the participants whether the supply chain needs adjustments as a result of these added tasks. Give the participants time to adjust the supply chain where needed.



Part 4 – Updating grouped activities and customer contact points

Overview

Output goal:	Adjusted supply chain map
Time:	5 min
Materials:	Template 3.3 from Part 3, markers in four colours

Purpose

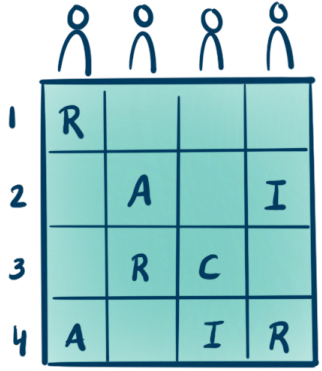
With the supply chain adjusted by new tasks, it is important that the grouped activities and customer contact points are also adjusted. In the Define Workshop, these were visualised (Part 1), which is useful for clarifying the communication channels in the supply chain to the participants.

Step-by-step

1. Ask the participants to draw the vertical lines again to regroup the adjusted activities into contracts, bookings, and rejections. Use a different colour for each part.

2. After regrouping the activities, ask the participants to also draw the customer contact points again.

3. Ensure all participants agree with the drawn lines. If not, ask them to explain why they made certain choices when drawing the lines.



Part 5 – Updating the RACI-matrix

Overview

Output goal:	A useable RACI-matrix, combined with visual information streams.
Time:	15 min
Materials:	Prepared RACI-matrix, markers

Purpose

With the prepared RACI-matrix, the participants are immediately shown how the matrix works. Additionally, the workshop speeds up by preparing this beforehand. This creates space for discussing the responsibilities defined in the RACI-matrix and adjusting it for the newly implemented tasks.

Step-by-step

1. Explain to the participants what the different roles in RACI mean: R for Responsible, A for Accountable, C for Consulted and I for Informed.

2. Ask the participants to go over the prepared RACI-matrix and let them add the RACI roles for the additional tasks. Make sure only one person is accountable per activity.

   Tip: during this activity, it is important to give participants space to speak up, because this is the moment to create a way of working.

3. Support the participants during the discussions to ensure a clear outcome for each activity.



Part 6 – Creating an agreement

Overview

Output goal:	An aligned implementation plan for the RACI-matrix
Time:	5 min
Materials:	Template 3.4 and 3.5 on A0-sheet, post-its, markers

Purpose

By discussing how the RACI-matrix will be used, the participants align on the implementation. Additionally, it should be discussed who is responsible and accountable for adjusting the matrix when needed. This helps with using the RACI-matrix in the supply chain and using it as a reference.

Step-by-step

1. Explain that this matrix should be implemented. Therefore, the involved participants have to discuss how they want to do this.

2. Ask the participants to answer the questions: "How do you want to use the RACI-matrix?" and "Who is responsible and accountable for keeping this RACI-matrix up to date?". Encourage the partcipants to mention some options like: use the matrix as a reference when disturbances occur, as a tool to guide meetings, to use in their daily tasks, etc.

3. Ask the participants to share their opinions, especially when these differ.

4. Ask the participants to decide as a team how to use the RACI-matrix and complete the following sentence on Template 3.5: We are going to use the RACI-matrix by/as/to ...

5. Explain to the participants that this RACI-matrix serves as an agreement for the upcoming time.



Outro 1 – Learning reflection

Overview

Output goal:	Learnings from the participants
Time:	3 min
Materials:	Template 3.6 on A0-sheet, post-its, markers

Purpose

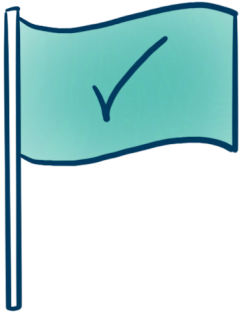
It is important to reflect on the workshop. Therefore, it is useful to see whether the expected learnings of the participants are met and what challenges they foresee.

Step-by-step

1. Thank all participants for their contributions and ask them to fill out the last A0-sheet with Template 3.6.

2. Ask the participants to answer the following questions: “What did you learn during this workshop? What new perspectives did it bring?”, “What challenges do you see in achieving the goal of today’s workshop?”, and “When is this workshop successful?”.

3. Discuss some interesting post-its if there is still time.



Outro 2 – Wrap-up

Overview

Output goal:	Wrapping up to make all participants leave content
Time:	2 min
Materials:	-

Purpose

After this workshop, the participants have to work on this supply chain independently again. This makes it important to close the workshop clearly and effectively to ensure that there are no remaining questions and the participants leave the workshop satisfied.

Step-by-step

1. Thank all participants for participating and ask whether they still have questions or things they would like to share.

2. Explain that this was the last workshop of the series. If the participants want a follow-up, this can be arranged after some time, but now it is important to start working with the insights gathered from the workshops. The RACI-matrix will be the leading document in this process.

3. Bring the workshop to an end.

Templates

To use during the workshop

Template 3.1

What do you expect to learn from this workshop?	What do you expect to contribute?

Template 3.2

Process task	What did you experience with these tasks?	What tasks would you consider relevant to implement in the supply chain?
Name 1 Name 2 Name 3 Name 4 Name 5 Name 6		

Template 3.3

Departments Dep4	
Dep3	
Dep2	
Dep1	
Information	
Activities	

Template 3.4

How do you want to use the RACI-matrix?	Who is responsible and accountable for keeping this RACI-matrix up to date?

Template 3.5

We are going to use the
RACI-matrix by/as/to...

... is responsible for keeping
the RACI-matrix up to date

Template 3.6

What did you learn during the workshops? What new perspectives did it bring?	What challenges do you see in achieving the goal of today's workshop?	When is this workshop successful?

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