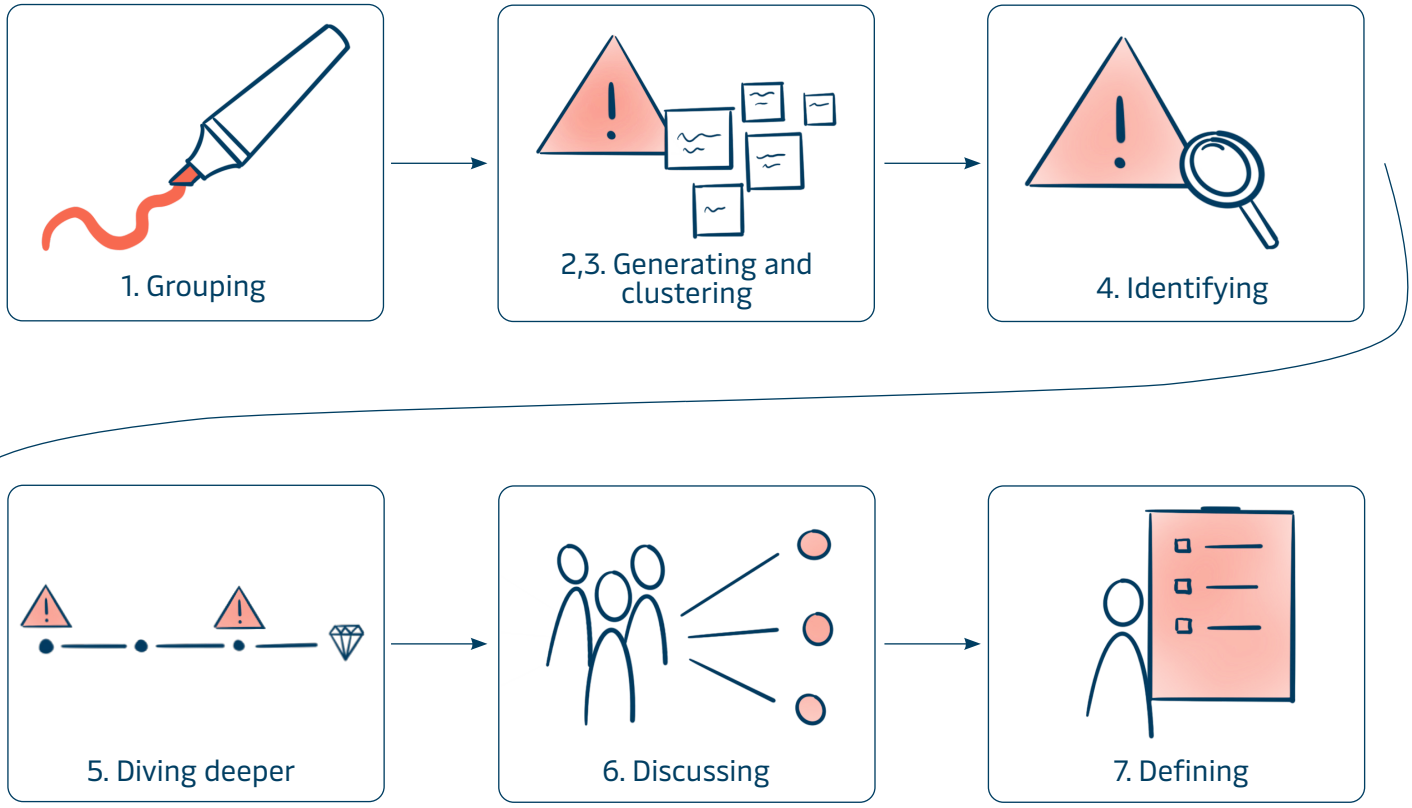
2

Integrated customer satisfaction

DEFINE

Step-by-step explanation to host the second workshop


1. Grouping
2,3. Generating and clustering
4. Identifying
5. Diving deeper
6. Discussing
7. Defining

Overview

The Define workshop has the aim of creating clear communication channels for the different departments involved by creating specific process tasks to ultimately create integrated customer service.

With the process mapped in the Explore Workshop, this workshop dives deeper into the problems that occur in the supply chain. After grouping the activities as a recap of the Explore Workshop, the participants start with problem generation and clustering to identify the root problem.

This root problem will be investigated further by discussing the responsibilities of the departments involved to define process tasks for all participants. Through this, the supply chain is improved with specific adjustments to create integrated customer service. The participants take the tasks into their daily operations to evaluate whether this helps create clear communication channels.

Total time

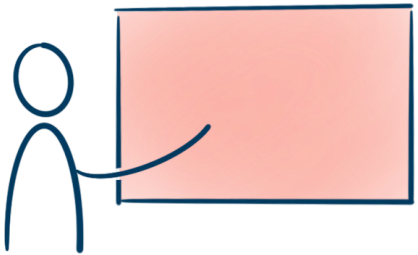
1 hour and 25 minutes (you can schedule extra time if you want to include a break an/or energiser).

Materials needed

- A0 sheets
- Markers
- Post-its
- Flipchart
- Worksheet Templates 2.1, 2.2, 2.3, 2.4, 2.5, 2.6
- Written down goal in Workshop 1 – Part 2
- Map generated in Workshop 1 – Part 5

Step-by-step

How to execute the Define workshop



Part 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 helps set their expectations.

Step-by-step

1. Make sure you put the goal and map from Workshop 1 (Part 2 & 5) up on the wall.

2. Start with a recap of the previous workshop: what did you do and what was the result? You can use the A0-sheets from the previous workshop to support your explanation.

3. Introduce the goal of the workshop: currently, there are many unclear communication channels in the supply chain serving customer X, both internally and towards the customer. With this workshop, the goal is to investigate the cause(s) of these unclear communication channels and to build a way forward by looking into how this problem occurs in the supply chain. This is followed by defining process tasks for all participants to establish clear communication channels and, ultimately, integrated customer service.

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.



Part 2 – Warming-up

Overview

Output goal:	Warm-up
Time:	5 min
Materials:	Depending on the energiser you chose

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 during the problem-generating phase, because participants need to feel comfortable sharing the problems they experience.

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 start by saying one word.

2. The next person has to say another word that fits grammatically.

3. Continue going around the group until the sentence is finished.

4. If there is time, you can repeat this exercise a few times.



Intro 3 – Learning expectations

Overview

Output goal:	Warm up and setting expectations
Time:	5 min
Materials:	A0 sheet with Template 2.1, 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 2.1 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 – Grouping supply chain activities

Overview

Output goal:	Activities grouped and contact points visualised
Time:	5 min
Materials:	Template 2.2 on A0-sheet, markers in four colours

Purpose

There are many different activities in the supply chain, which can lead to a lack of overview for the participants. Therefore, the output of Workshop 1 is used to group the different activities visually. Additionally, the customer contact points are also visualised to create a clearer overview. This part also serves as a reminder of the outcomes of the previous workshop.

Step-by-step

1. Prepare Template 2.2 by writing down the results of the Explore Workshop – Part 5.

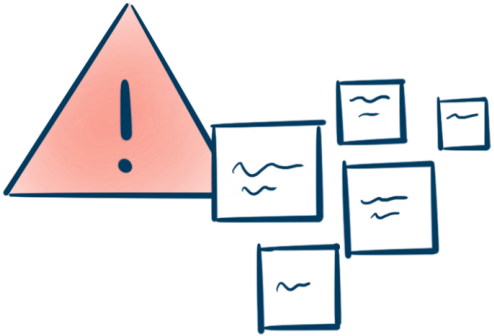
2. Remind participants of the output of the previous workshop by showing their results from the Explore Workshop – Part 5. Put it on the table.

3. Ask the participants to group the activities in 3 parts: contract, bookings, and rejections. They can draw vertical lines in different colours in front of the activities to show which activities belong to each part.

4. Once finished, ask them to draw circles around the checks of departments involved in customer contact poins.

5. Ensure all participants agree with the grouped activities and customer contact points. If not, ask them to explain why they made certain choices when drawing the lines.

6. When all lines have been drawn, hang the sheet on the wall so it remains visible for the next parts.



Part 2 – Problem generating

Overview

Output goal:	Generated problems from different perspectives
Time:	5 min
Materials:	Post-its, A0 sheet, markers

Purpose

To find the underlying problems behind the unclear internal communication channels and information streams, problems are generated. Together, these problems show the root cause of how this unclear situation evolved.

Step-by-step

1. Explain to the participants that there are currently unclear communication channels. This can be seen because the supply chain does not work well and because there is unclarity towards the customer due to fragmented customer service.

2. Set a timer for 5 minutes.

3. Ask participants to write down all problems they experience with the internal communication channels. Make sure they write down everything that comes to mind and do not judge their problems before writing them down.

4. When participants start struggling to write problems down, encourage them by asking the following questions:
   - I feel there is a lack of ...
   - I feel there is too much ...
   - Other employees from my department experience ...
   - The internal communication channels are currently unclear because ...
   - The unclear channels arise from ...
   - For me, this is unclear ...

5. When the timer goes off, make sure the participants write down their last problem.

6. Wrap up this part by letting all participants look at what others wrote down, and briefly discuss the post-its if time allows.



Part 3 – Clustering problems

Overview

Output goal:	Clusters with overarching themes of occurring problems
Time:	5-10 min
Materials:	A0-sheet with all problems on post-its from Part 2, markers

Purpose

Through clustering, overarching themes that show the root causes of the problem can be found. This creates a shared understanding of these themes. Besides, this also creates an overview of the output from Part 2 and helps partcipants get closer to the root problem.

Step-by-step

1. Remind the participants of the problem you are working on: addressing the unclear communication channels wihtin the supply chain.

2. Explain that the many problems generated can be grouped into overarching themes.

3. Ask the participants to cluster the problems in groups with similar or overlapping themes.

4. Once the partcipants are done clustering, check whether all post-its are in a cluster, otherwise create a 'leftover' cluster or create one-post-it clusters.

5. If all clusters are created, generate names for each cluster. Write the names down on the A0-sheet with the clusters.

6. Check whether everybody agrees on the clusters and create a bridge to Part 4.



Part 4 – Identifying the root cause

Overview

Output goal:	Identify the most pressing root causes that cause unclear communication channels
Time:	10 min
Materials:	Template 2.3 on A0-sheet, post-its, markers

Purpose

The aim is to identify the most pressing root causes by placing the clusters from Part 3 in a C-box (a coordinate system). Within the C-box, the x-axis represents cost, while the y-axis represents customer satisfaction. Since Maersk is a profit-driven company, cost savings are important, and customers are essential for generating profit. This makes customer satisfaction highly important. The problem located in the bottom-left corner furthest from the centre of the C-box can be labeled as the root problem and should be addressed.

Step-by-step

1. Explain to the participants that they will map the clusters created in Part 3 on two axes, one for cost and one for customer satisfaction, using Template 2.3. The middle of the C-box represents a neutral impact on both axes.

2. Explain what each axis means and why this is important (see purpose).

3. Ask the participants to write down the names of each cluster on a post-it and place them in the C-box.

4. When all post-its are placed, make sure all participants agree on the placement of the clusters on the axes.

5. The post-it that is in the furthest bottom-left position is the most pressing problem, since it has the strongest negative impact on both customer satisfaction and profit. Explain to the participants that this cluster is the root problem and will be analysed further.



Part 5 – Diving into the core problem

Overview

Output goal:	Identified where the core problem occurs across the supply chain
Time:	15 min
Materials:	Template 2.2 from Part 1, post-its, markers

Purpose

When the theme of the most pressing problem is chosen, a solution has to be created to address the unclear communication channels. Therefore, all activities across the supply chain have to be reviewed to ensure that all participants understand how this problem emerges throughout the supply chain. Participants can place post-its describing the problems on the supply chain map to share the issues they experience. In addition, this also shows which moments are crucial for preventing unclear communication channels.

Step-by-step

1. Prepare Template 2.2 using the input from Part 1.

2. Explain that the chosen direction will now be addressed.

3. Ask the participants to write down the problems they experience in the supply chain within the direction of the root problem identified in Part 4.

4. Set a timer for approximately 7 minutes.

5. Make sure all participants look at the entire supply chain and share their perspectives.

6. When everybody is done, let the participants look at the problems that have been identified.

7. Take a photo of the outcome.



Part 6 – Discussing responsibilities

Overview

Output goal:	Align responsibilities to ensure clear communication channels
Time:	10 min
Materials:	Template 2.4 on A0-sheet, post-its, markers

Purpose

The problems in the supply chain identified in Part 5 have to be addressed. Otherwise, the unclear communication channels will continue to exist, which must be prevented. Therefore, it is important to assign the problems to the departments, to show participants where responsibilities lie. This creates an overview of who should address which problems to improve the communication channels.

Step-by-step

1. Prepare Template 2.4 by placing the different departments involved in the supply chain on the map.

2. Remind the participants of the goal of the workshop: to create clear communication channels for the supply chain.

3. Explain to the participants how Template 2.4 works: problems can be the responsibility of one department, but also of multiple departments. The post-its from Part 5 have to be placed on the department or on the line between different departments to show who is responsible for addressing which problems.

4. Let the participants take the problems from the supply chain and place them under or between the relevant department(s) on the map.



Part 7 – Defining process tasks

Overview

Output goal:	Process tasks that all participants can work on to improve the communication channels
Time:	10 min
Materials:	Template 2.5 on A0-sheet, post-its, markers

Purpose

The aim is to define clear process tasks for each participant to improve the communication channels in the supply chain. By putting down process tasks, it becomes tangible what each participant has to do to improve the channels. This also creates a clear conclusion to the Define Workshop for the participants.

Step-by-step

1. Let all participants write down the tasks they think they should take based on the responsibilities identified in Part 6 and let them put the post-its behind their name on the A0-sheet.

2. Encourage the participants to critically consider what is needed to create clear communication channels across the supply chain when defining the process tasks.

   Tip: Make sure the participants do not only write down that they want more meetings. For information sharing, other tools, such as email, can be used to lower the workload and work more efficiently than meetings.

3. Let everybody explain what their process tasks are.

4. If necessary, let the other participants add additional points.

5. Explain to the participants that this is the conclusion of the Define Workshop. They can work on implementing the process tasks in the upcoming weeks until the Refine Workshop. During this last workshop, the tasks will be evaluated.



Outro 1 – Learning expectations

Overview

Output goal:	Learnings from the participants
Time:	3 min
Materials:	Template 2.6 on A0-sheet, post-its, markers

Purpose

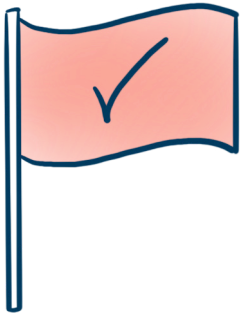
It is important to reflect on the workshop. Therefore, it is useful to see whether the expected learnings of the participants are met and what challenges they foresee. These insights can be used to shape the approach for the Refine Workshop.

Step-by-step

1. Thank all participants for their contributions and ask them to fill out the last A0-sheet with Template 2.6.

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

By wrapping things up, all participants understand that the workshop has ended, gain clarity on the tasks between workshops, and understand what the next workshop will focus on. Furthermore, it is important to ensure that all participants leave with a positive feeling, so that they look forward to attending the next workshop.

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 the third workshop will take place in three weeks. This workshop will evaluate the process tasks from this workshop. This means that the participants can start applying the insights in their daily tasks.

3. Bring the workshop to a close.

Templates

To use during the workshop

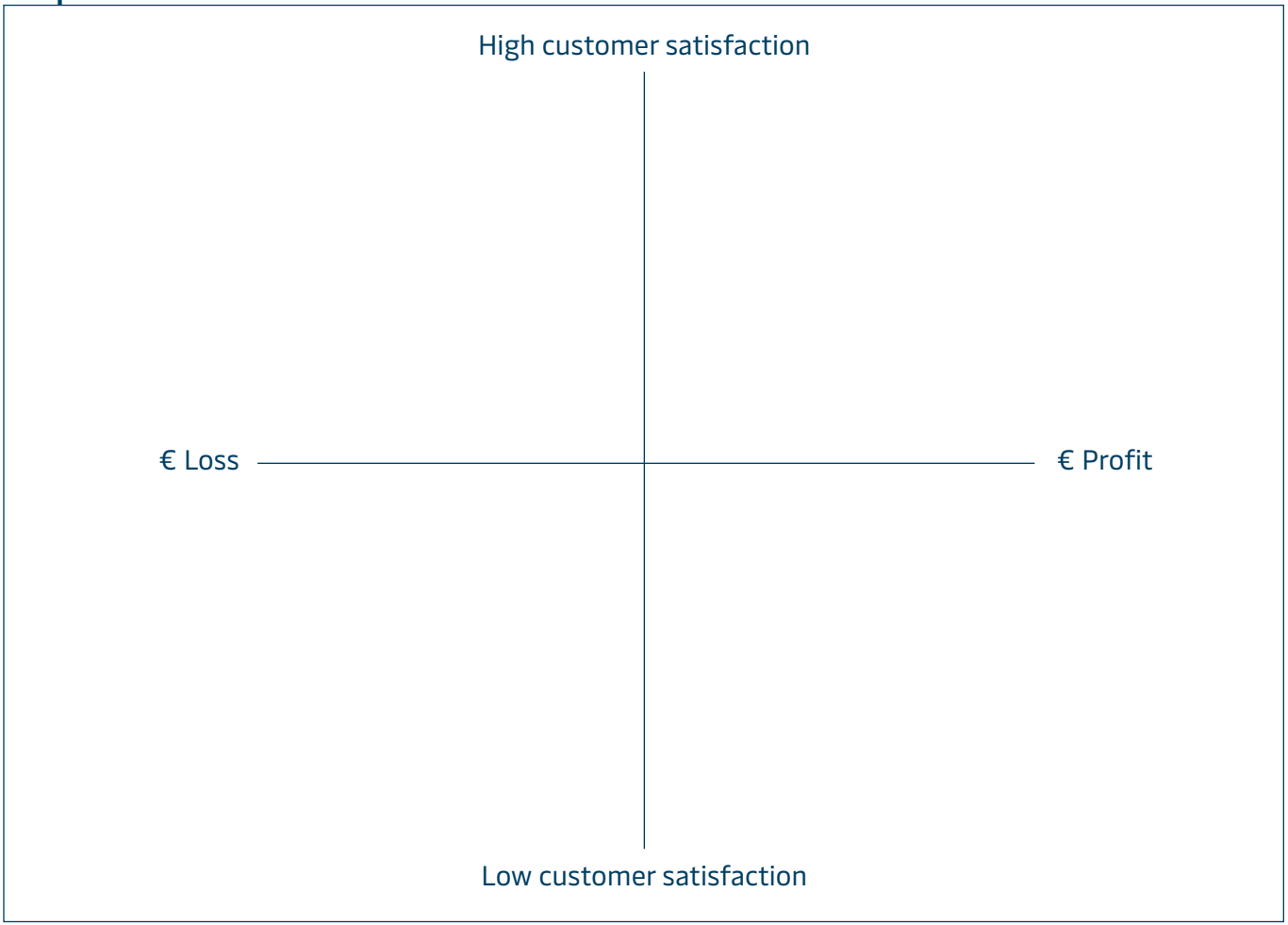
Template 2.1

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

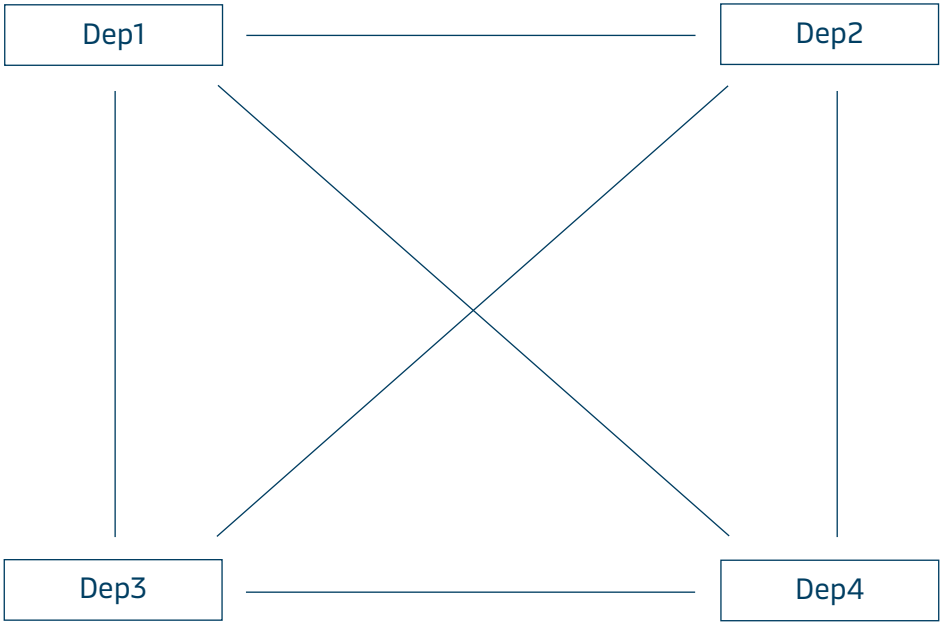
Template 2.2

Departments Dep4	
Dep3	
Dep2	
Dep1	
Information	
Activities	

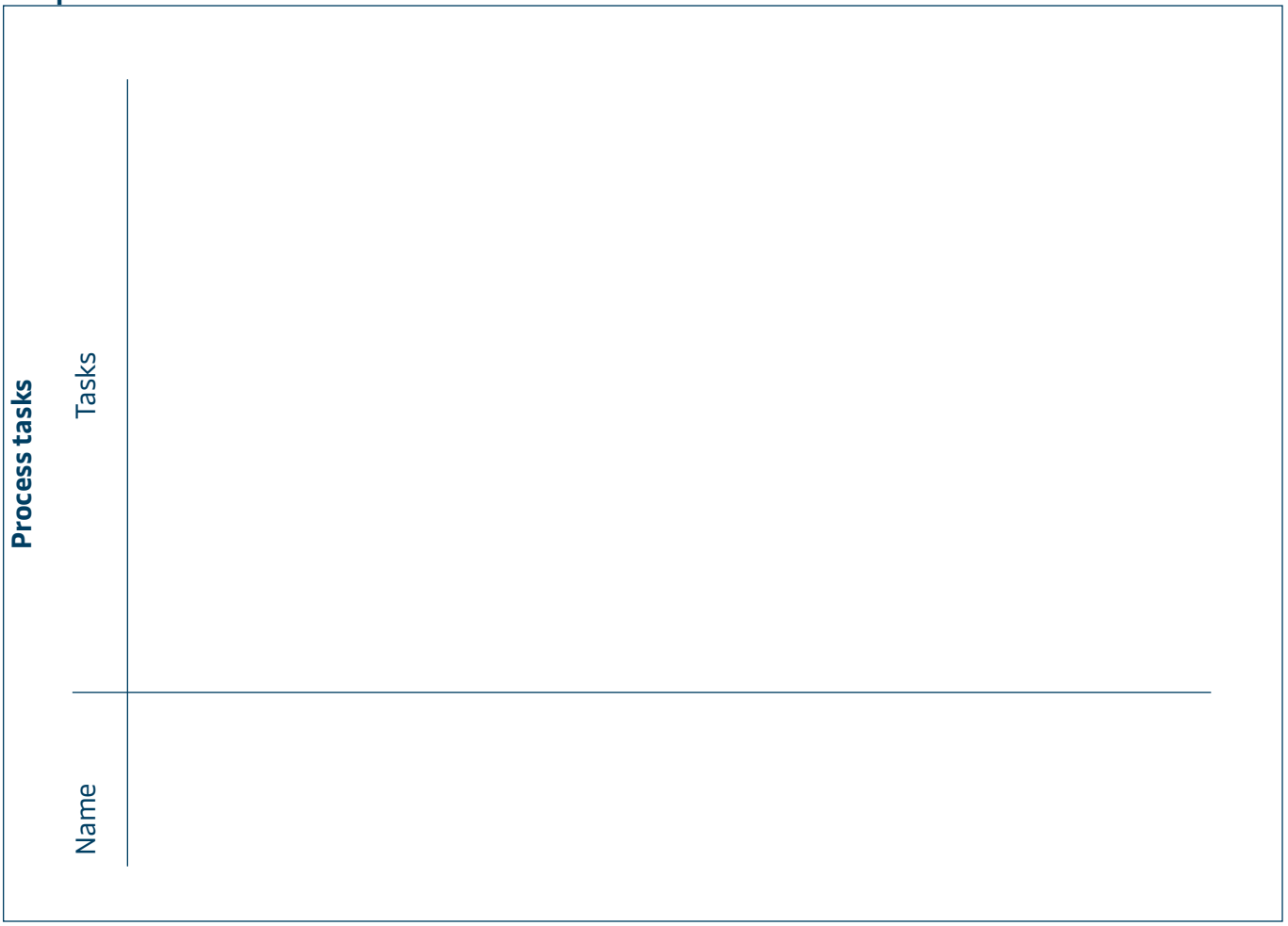
Template 2.3


High customer satisfaction
€ Loss
€ Profit
Low customer satisfaction

Template 2.4



Template 2.5



Template 2.6

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?

Concept and design by Tesse Wolthaus
Designed for Maersk

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