

Process Modelling Facilitator's Handbook

Room Preparation

The activity will be performed in teams of 3 to 5 people each. Each team will need a dedicated surface, which can be on a wall or a table.

Ideally, at least one team should be able to work on a wall. Their experience will be slightly better; you can point it out during the closing discussion.

Kick-off

Divide the audience into teams. Each team should be of 3 to 5 participants and have:

- A **clean modelling surface** of 3-4 metres (paper roll on a wall or a table);
- **enough stickies** of all the needed colours and **a marker for every person**;
- at least **one copy of the Process Modelling Cheat Sheet**.

The exercise is simple enough to start without much guidance, but you may want to seed one board, if participants are stuck.

The problem space

We'll be modelling the experience of purchasing ice creams in an ice cream shop in the summertime. The process looks simple, but we might inject plenty of implicit choices and variations to make it gradually more sophisticated.



Kicking it off

I usually start with the decision-making happening outside the shop: the first action performed by the customer is usually **ENTER SHOP**, but the information we need to decide can be more or less rational, like **PRICE LIST** or **SUNNY OUTSIDE**.

Once the first policy has been laid out—usually a **GREETING POLICY**—the teams can get along independently. Then, the facilitator should ideally jump from one modelling team to another.

Resolving blockers

A few tricks are needed to complete the modelling flow; you may help one team or make the solution available to everybody. One good idea might be to alternate time-boxed modelling and question time sessions.

Wrapping up

You may want to end with a showcase of the different models, but keep in mind that every review might take a few minutes, with some overlapping explanations. So make sure you manage the time properly and stop the modelling phase with enough time for the exploration.

A good question to optimise time might be, “What did you do differently here?” This usually fuels local discussions and gets straight to the point.

Optionally, you may close the sessions turning the final questions on a more general overview.

What to highlight

Here is a little list of the topics that could pop up during the exercise:

- There are **many ways to start**: some teams will do a little chaotic exploration with orange events, and others will start from the first command, enforcing the grammar from the beginning.
- **Read models for external users** can be rational or emotional, which can become important in the customer-facing portions of the flow.
- Postponing **Policy Naming**: the real name will pop out later.
- **Conversational Systems** may help to visually describe situations that cannot be modelled as a sequence, like the initial conversation with the customer.
- Focusing on the **Termination Condition** can help model these unstructured conversations.
- Focusing on **Value** (the little blue and green stickies) can highlight the user experience perspective.
- There is not one single style.
- **Collaboration** is what makes it great, but balancing different attitudes is what makes it hard.
- **Hot Spots** are your best friends, especially in their “Not now!” meaning.
- **Look at the solutions** from the other teams; often, the best ideas come from mixing separate approaches.

Shopping List

- For the **whole workshop**:
 - 1 Plotter Paper roll, 50m * 90cm.
 - 1 Scissors
 - Masking tape
- Per **Team**:
 - Regular square sticky notes: Orange, Blue, Green, Magenta
 - Large rectangular stickies: Pink, Lilac.
 - Small rectangular stickies: Yellow, Green, Red.
 - Coloured tape (optional, you may want to use the masking tape)
- Per **Person** (including the facilitators)
 - 1 Black marker,
 - 1 Printed copy of the **Process Modelling Cheat Sheet** - better if on thick paper.

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