

Issue #37: Workflow Discovery & Integration Analysis Activity

Repository: CherrelleTucker/codesign-toolkit **URL:**

<https://github.com/CherrelleTucker/codesign-toolkit/issues/37> **Author:** @CherrelleTucker

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Assignees: None

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Workflow Discovery & Integration Analysis Activity

Activity Overview

Duration: 2-3 hours per session

Participants: 3-6 end users per session

Format: Interactive workshop with multiple discovery techniques

Pre-Activity Setup

- **Stakeholder Mapping:** Identify primary, secondary, and peripheral users
- **Context Gathering:** Understand current pain points and desired outcomes
- **Material Prep:** Large format paper, sticky notes, markers, digital collaboration tools

Phase 1: Current State Workflow Mapping (45 minutes)

Journey Mapping Exercise

Technique: End-to-end process visualization

Instructions:

1. Trigger Identification (10 min)

- "What starts this process for you?"
- "How do you know it's time to begin?"
- Map all possible entry points

2. Step-by-Step Walkthrough (25 min)

- Use sticky notes for each action
- Include decision points, handoffs, delays
- Capture tools, systems, and people involved

◦ Key Questions:

- "What happens next?"
- "Who else is involved at this point?"
- "What could go wrong here?"
- "How long does this typically take?"

3. Parallel Process Discovery (10 min)

- "What else are you doing while this happens?"
- "What other processes intersect with this one?"

Workflow Documentation Template

Step [#] | Action | Tool/System | People Involved | Time | Pain Points | Dependencies

Phase 2: Tribal Knowledge Excavation (40 minutes)

"Day in the Life" Shadowing Simulation

Technique: Detailed walkthrough with probing questions

Activities:

1. **The "Obvious" Challenge** (15 min)

- Ask users to explain their process to a "new hire"
- Record everything they assume is "obvious"
- **Probe:** "How did you learn that?" "Is that written down anywhere?"

2. **Exception Scenarios** (15 min)

- "What happens when [system] is down?"
- "How do you handle rush jobs?"
- "What's your workaround when [X] doesn't work?"

3. **Muscle Memory Mapping** (10 min)

- Watch users demonstrate physical/digital actions
- **Ask:** "Why do you do it that way?"
- "What would happen if you couldn't do that step?"

Tribal Knowledge Indicators Checklist

- Processes learned through observation only
- Unwritten quality checks
- Personal shortcuts and hacks
- Relationship-dependent handoffs
- Historical context ("We do this because...")

Phase 3: Solution Integration Points Analysis (35 minutes)

Replacement Feasibility Assessment

Method: Color-coded workflow analysis

Categories:

-  **Easily Replaceable:** Routine, digital, rules-based tasks
-  **Partially Replaceable:** Tasks requiring human judgment or creativity
-  **Non-Replaceable:** Critical human skills, regulatory requirements, relationship-dependent
-  **Unknown/Hybrid:** Requires deeper investigation

Integration Opportunity Mapping (20 min)

1. Direct Replacement Points

- Which steps could your solution completely handle?
- What data/inputs would it need?

2. Enhancement Opportunities

- Where could your solution augment human capability?
- What information could it provide to improve decisions?

3. Handoff Points

- Where does your solution need to interface with existing systems?
- What triggers would start/stop your solution's involvement?

Barrier Identification Exercise (15 min)

"Red Flag" Analysis:

- Regulatory/compliance requirements
- Union or policy constraints
- Cultural resistance points
- Technical limitations
- Training/adoption challenges

Phase 4: Validation & Prioritization (20 minutes)

Impact vs. Effort Matrix

Plot each integration opportunity on:

- **X-axis:** Implementation difficulty (including tribal knowledge barriers)
- **Y-axis:** Business impact/value

Stakeholder Buy-in Assessment

Questions for each integration point:

1. "How would this change affect your daily work?"
2. "What concerns do you have about this approach?"
3. "What would make this transition successful?"
4. "Who else would need to be involved in this change?"

Deliverables & Follow-up Actions

Immediate Outputs

1. **Current State Workflow Map**
2. **Tribal Knowledge Repository**
3. **Integration Feasibility Matrix**
4. **Barrier Analysis Report**
5. **Stakeholder Concern Log**

Follow-up Activities

- **Workflow Validation Sessions:** Review findings with broader user group
- **Technical Feasibility Assessment:** Align discoveries with development capabilities
- **Change Management Planning:** Address identified barriers and concerns
- **Iterative Design Sessions:** Refine solution based on workflow insights

Success Metrics

- Complete end-to-end workflow documentation
- Identification of at least 3 tribal knowledge areas
- Clear categorization of all workflow steps by replacement feasibility
- Stakeholder alignment on integration approach

Facilitation Tips

For Uncovering Tribal Knowledge:

- Use open-ended questions: "Tell me more about..."
- Look for hesitations or "well, usually..." statements
- Ask about exceptions and edge cases
- Probe assumptions: "Why is that important?"

For Resistance Management:

- Acknowledge expertise and experience
- Focus on enhancement rather than replacement
- Address concerns directly and honestly
- Involve users in solution design decisions