

# JIBC Workshops – Facilitator’s Dashboard (Phased, Color-Coded with Timeline)

This dashboard shows all workshops, their deliverables, responsible roles, and phase alignment. Timeline markers (Oct → Dec → Mar) indicate the overall schedule cadence.

Workshop	Deliverables	Responsible Roles	Phase	Timeline
Kickoff & Scope	Current State Assessment; Charter updates	Execs, PMO, Facilitator	Discovery	Oct
Stakeholder Map & Problem Framing	Stakeholder Map; RAID log	SMEs, Facilitator, PMO	Discovery	Oct
Current State Sales→Contract	As-Is Process Map; Pain Point Heatmap	Sales SMEs, Facilitator	Discovery	Oct
Current State Delivery→Invoice	As-Is Process Map; Pain Point Heatmap	Finance, Ops SMEs	Discovery	Oct
Vision & KPIs	Vision Statement; Draft KPIs	Execs, Sponsor	Discovery	Oct
Value Streams	Value Stream Map; Customer Journey overlays	Facilitator, SMEs	Discovery	Oct
Capability Mapping	Capability Model; Heatmap	EA, IT, SMEs	Design	Nov
Operating Model Options	Draft Operating Model Options	Execs, PMO	Design	Nov
TO-BE Process Sales	Future Sales BPMN	Sales SMEs, EA	Design	Nov
TO-BE Process Delivery/Billing	Future Billing BPMN	Finance, Ops SMEs	Design	Nov
Data Model Deep-Dive	Canonical Data Model; Entity Definitions	IT, Data SMEs	Design	Nov
Integration Landscape	Integration Blueprint	IT Architects	Design	Nov
Gap Analysis & Controls	Gap Analysis Report; Risk Register	Facilitator, SMEs	Design	Nov
Exec Checkpoint – TOM	Validated TOM	Execs, Sponsor	Design	Nov
CRM Requirements Functional	Requirements Matrix (functional)	Business SMEs	Requirements	Dec
CRM Requirements Non-Functional	Requirements Matrix (non-functional)	IT, Security	Requirements	Dec
User Stories & Traceability	Prioritized Backlog	Product Owner, SMEs	Requirements	Dec
Change & Adoption Strategy	Change Adoption Plan	HR, Comms, PMO	Requirements	Dec
Integration Design	Integration Design Spec	IT Architects, Data SMEs	Integration	Jan

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Data Migration Plan	Data Migration Plan	IT, Data Governance	Integration	Jan
Solution Options & TCO	Options & TCO Report	PMO, Finance, IT	Integration	Jan
Security & Privacy Review	Privacy & Security Report	Legal, Security, IT	Integration	Jan
Roadmap & Phasing	Phased Implementation Roadmap	PMO, Execs	Roadmap	Feb
Benefits & KPIs	Benefits & KPI Register	PMO, Execs	Roadmap	Feb
Operating Model Decision	Final Operating Model Proposal	Execs, Sponsor	Roadmap	Feb
Exec Report Dry Run	Draft Report & Slides	Steering Committee, Facilitator	Finalization	Mar
Final Readout & Approval	Final Report & RAID log	Execs, Sponsor	Finalization	Mar
Mobilization Workshop	Mobilization Plan	PMO, Product Owners	Finalization	Mar