JIBC Workshop Facilitation Guidebook – Full Edition

This guidebook provides facilitators with step-by-step instructions on how to construct deliverables for each of the 28 workshops, along with examples of the expected outputs.

# Kickoff & Scope

Activities: Align objectives, confirm scope, validate context, review goals.

Deliverables: Current State Assessment framework; Project Charter updates.

## Steps to Construct Deliverables:

* Review existing documentation (strategic plans, CRM initiative background).
* Facilitate a kickoff discussion to confirm objectives and scope.
* Capture agreed boundaries and success criteria.
* Populate a Current State Assessment template with known information.

## Example Output:

2-page Project Charter update with scope statement, objectives, stakeholders, and initial RAID items.

# Stakeholder Map & Problem Framing

Activities: Identify stakeholders, map responsibilities, define problem statement.

Deliverables: Stakeholder Discovery Notes; Initial RAID log.

## Steps to Construct Deliverables:

* Brainstorm all stakeholder groups.
* Place roles/responsibilities on a RACI chart or Miro board.
* Draft a consolidated stakeholder map.
* Capture issues in a RAID log.

## Example Output:

Stakeholder Map diagram with swimlanes + 1-page RAID log.

# Current State Sales→Contract

Activities: Walk through lead-to-contract lifecycle; document steps & issues.

Deliverables: As-Is Process Map; Pain Point Heatmap (sales).

## Steps to Construct Deliverables:

* Facilitate SMEs to map lead-to-contract lifecycle in BPMN.
* Note manual steps, bottlenecks, and dependencies.
* Heatmap pain points with colour coding.

## Example Output:

BPMN diagram showing opportunity → proposal → contract, annotated with 6 pain points.

# Current State Delivery→Invoice

Activities: Walk through delivery-to-invoice lifecycle; document handoffs & bottlenecks.

Deliverables: As-Is Process Map; Pain Point Heatmap (delivery/finance).

## Steps to Construct Deliverables:

* Map contract delivery through invoicing.
* Record system handoffs and reconciliation issues.
* Identify points of failure for RAID log.

## Example Output:

Process flow with finance handoffs highlighting invoice delays.

# Vision & KPIs

Activities: Define CRM vision & KPIs.

Deliverables: Draft KPIs linked to goals; Vision Statement.

## Steps to Construct Deliverables:

* Run exec visioning session.
* Brainstorm success outcomes.
* Translate outcomes into measurable KPIs.
* Document KPIs in SMART format.

## Example Output:

Vision slide and KPI table (e.g., reduce contract turnaround from 10→5 days).

# Value Streams

Activities: Map sales & delivery value streams; identify customer touchpoints.

Deliverables: Value Stream Map; Customer Journey overlays.

## Steps to Construct Deliverables:

* Map the end-to-end value stream (Lead → Invoice).
* Identify value delivery steps.
* Overlay customer journey.
* Validate with stakeholders.

## Example Output:

Value Stream Map with 7 stages overlaid with customer satisfaction touchpoints.

# Capability Mapping

Activities: Link capabilities to processes; identify gaps.

Deliverables: Capability Model; Capability-Process alignment.

## Steps to Construct Deliverables:

* Map key business capabilities (CRM, Contracts, Billing).
* Align to existing processes.
* Score maturity/pain levels.

## Example Output:

Heat-mapped capability model highlighting weak contract management areas.

# Operating Model Options

Activities: Compare centralized vs distributed service models.

Deliverables: Draft Operating Model Options (RACI, intake workflow).

## Steps to Construct Deliverables:

* Define centralized vs distributed models.
* Create RACI for each.
* Capture pros/cons and service catalog implications.

## Example Output:

Comparison matrix with 2 options and draft intake workflow diagram.

# TO-BE Process Sales

Activities: Define future sales-to-contract process.

Deliverables: To-Be BPMN Sales Process.

## Steps to Construct Deliverables:

* Start with As-Is map.
* Redesign to eliminate manual bottlenecks.
* Add CRM automation touchpoints.
* Validate with SMEs.

## Example Output:

Future BPMN with automated contract approval.

# TO-BE Process Delivery/Billing

Activities: Define future delivery & billing flows.

Deliverables: To-Be BPMN Delivery/Billing Process.

## Steps to Construct Deliverables:

* Start with As-Is billing process.
* Redesign for automation and system triggers.
* Validate with finance SMEs.

## Example Output:

Future BPMN showing automated invoice generation.

# Data Model Deep-Dive

Activities: Define core entities (Accounts, Contacts, Orgs, Orders).

Deliverables: Canonical Data Model; Entity Definitions.

## Steps to Construct Deliverables:

* Identify core entities.
* Define relationships.
* Create ERD diagram.
* Draft data dictionary.

## Example Output:

ERD with Accounts↔Opportunities; Data Dictionary with field definitions.

# Integration Landscape

Activities: Map systems, interfaces, data flows.

Deliverables: Integration Blueprint (catalog, flows, risks).

## Steps to Construct Deliverables:

* List all systems (SIS, LMS, ERP).
* Capture current integrations.
* Map data flows.
* Record risks.

## Example Output:

Integration catalog with flows and risk annotations.

# Gap Analysis & Controls

Activities: Identify gaps between current & future; propose controls.

Deliverables: Gap Analysis Report; Risk Register updates.

## Steps to Construct Deliverables:

* Compare As-Is vs To-Be.
* Rate severity of gaps.
* Propose mitigating controls.

## Example Output:

Gap matrix with columns: Gap, Impact, Control, Owner.

# Exec Checkpoint – TOM

Activities: Validate Target Operating Model with executives.

Deliverables: Draft TOM validated by execs.

## Steps to Construct Deliverables:

* Present draft TOM.
* Capture exec feedback.
* Update TOM and RAID log.

## Example Output:

Validated TOM diagram with exec sign-offs.

# CRM Requirements Functional

Activities: Gather business functional requirements.

Deliverables: CRM Requirements Matrix (functional).

## Steps to Construct Deliverables:

* Collect functional requirements via workshops.
* Document into Excel/backlog.
* Prioritize with SMEs.

## Example Output:

Requirements matrix with priority scoring.

# CRM Requirements Non-Functional

Activities: Capture performance, security, compliance needs.

Deliverables: CRM Requirements Matrix (non-functional).

## Steps to Construct Deliverables:

* Collect non-functional requirements (security, performance).
* Document in requirements matrix.
* Validate with IT/compliance leads.

## Example Output:

Requirements matrix with NFR categories (e.g., response time < 2s).

# User Stories & Traceability

Activities: Break down into epics, features, user stories.

Deliverables: Prioritized Backlog with Epics/Stories.

## Steps to Construct Deliverables:

* Write epics and stories.
* Link to KPIs and requirements.
* Create traceability matrix.

## Example Output:

Backlog story: 'As a Program Admin, I want auto-generated invoices.'

# Change & Adoption Strategy

Activities: Define training & comms strategy.

Deliverables: Change Adoption Plan.

## Steps to Construct Deliverables:

* Identify impacted roles.
* Define training and comms plan.
* Document adoption approach.

## Example Output:

Adoption playbook with training calendar and comms templates.

# Integration Design

Activities: Define CRM integration design.

Deliverables: Integration Design Spec.

## Steps to Construct Deliverables:

* Confirm integration scope.
* Create interface specs.
* Map canonical flows.

## Example Output:

Integration design doc with API specs and mappings.

# Data Migration Plan

Activities: Define approach for migrating data.

Deliverables: Data Migration Plan.

## Steps to Construct Deliverables:

* Identify data sources.
* Define cleansing rules.
* Plan migration steps.

## Example Output:

Migration roadmap with ETL steps and quality checks.

# Solution Options & TCO

Activities: Evaluate CRM solution options.

Deliverables: Solution Options & TCO Report.

## Steps to Construct Deliverables:

* Shortlist CRM vendors.
* Evaluate against criteria.
* Build cost model.

## Example Output:

TCO comparison table with 3 vendors.

# Security & Privacy Review

Activities: Validate privacy, FOIPPA compliance, security controls.

Deliverables: Privacy & Security Compliance Report.

## Steps to Construct Deliverables:

* Validate FOIPPA compliance.
* Review security controls.
* Document risks and mitigations.

## Example Output:

Compliance report with risk register updates.

# Roadmap & Phasing

Activities: Sequence implementation into 90/180/360 phases.

Deliverables: Phased Implementation Roadmap.

## Steps to Construct Deliverables:

* Define roadmap milestones.
* Sequence initiatives.
* Visualize dependencies.

## Example Output:

Gantt chart showing phased rollout.

# Benefits & KPIs

Activities: Define benefits realization metrics.

Deliverables: Benefits & KPI Register.

## Steps to Construct Deliverables:

* Define expected benefits.
* Link benefits to KPIs.
* Record in benefits register.

## Example Output:

Register with benefits, metrics, and owners.

# Operating Model Decision

Activities: Final decision on TOM (centralized vs common).

Deliverables: Final Operating Model Proposal.

## Steps to Construct Deliverables:

* Present model options.
* Facilitate exec decision.
* Finalize RACI and service catalog.

## Example Output:

Final TOM document with signed decision log.

# Exec Report Dry Run

Activities: Review draft exec report & slides.

Deliverables: Draft Executive Report & Slide Brief.

## Steps to Construct Deliverables:

* Present draft report.
* Gather steering feedback.
* Refine slides and report.

## Example Output:

Exec deck with comments tracked.

# Final Readout & Approval

Activities: Present findings, roadmap, operating model for approval.

Deliverables: Final Executive Report & Slide Deck; Final RAID log.

## Steps to Construct Deliverables:

* Deliver final findings.
* Secure approval.
* Log decisions in RAID.

## Example Output:

Signed-off Executive Report and RAID closure.

# Mobilization Workshop

Activities: Plan Sprint-0; assign roles/resources.

Deliverables: Mobilization Plan.

## Steps to Construct Deliverables:

* Define Sprint-0 plan.
* Assign roles and resources.
* Build sprint backlog.

## Example Output:

Mobilization Plan with resource assignments and backlog items.