

Workflow Optimization Platform

Communication & Stakeholder Enablement — Detailed Product Requirements Document (PRD)

1. Purpose & Vision

1.1 Purpose

The purpose of this enhancement is to extend the existing Workflow Optimization Platform beyond *analysis and design* into **decision-grade communication, alignment, and change enablement**.

This PRD defines a structured communication layer that allows different stakeholder groups—**executive leadership, facilitators, and participants**—to clearly understand:

- What changed
- Why it changed
- What impact it delivers
- What it means for them

1.2 Product Vision

Build a platform that not only designs better workflows, but **earns trust, accelerates decisions, and enables adoption**.

The platform should function as:

- A **decision brief** for leadership
 - A **guided system of thought** for facilitators
 - A **clarity and voice mechanism** for frontline users
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2. Target Personas & Jobs-To-Be-Done

2.1 Executive Leadership (VP, Plant Manager, Director)

Primary Jobs

- Understand impact quickly
- Approve or reject with confidence
- Defend decisions later

Pain Points

- Too much operational detail
 - Unclear ROI or risk
 - No audit trail
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2.2 Facilitator (CI Leader, Consultant, Ops Excellence)

Primary Jobs

- Guide teams toward high-quality future states
- Prevent shallow or biased designs
- Maintain consistency across workshops

Pain Points

- Solution-jumping
 - Opinion-driven debates
 - Inconsistent facilitation quality
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2.3 Participants (Operators, SMEs, Supervisors)

Primary Jobs

- Understand how work will change
- Provide practical input
- Prepare for transition

Pain Points

- Fear of hidden agendas
 - Lack of feedback closure
 - Poor training readiness
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3. Functional Scope Overview

This PRD introduces four new functional pillars:

1. Executive Communication & Decision Enablement
 2. Facilitator Intelligence & Control
 3. Participant Clarity & Voice
 4. Cross-Stakeholder Change Storytelling
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4. Detailed Feature Requirements

EPIC A — Executive Communication & Decision Enablement

A1. Executive Transformation Narrative

Description

Auto-generated, read-only narrative summarizing the workflow optimization in executive language.

Functional Requirements

- System-generated summary including:
 - Problem statement
 - Current state constraints
 - Future state design intent
 - Quantified benefits
- Narrative updates automatically when future state is revised
- Manual facilitator annotations allowed (optional)

Inputs

- Baseline workflow metrics
- Future-state workflow
- Step eliminations / consolidations
- Facilitator notes

Outputs

- Executive Summary Page

- Exportable (PDF)

Acceptance Criteria

- Executive can understand optimization in <10 minutes
 - No raw workflow diagrams shown by default
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A2. KPI Impact Bridge

Description

Maps process-level improvements to leadership KPIs.

Functional Requirements

- Each workflow change must be linkable to ≥ 1 KPI
- KPI categories:
 - Cost
 - Service / Throughput
 - Quality
 - Risk / Safety
- Allow assumptions to be documented

Outputs

- Impact table
 - Delta visualization (before / after)
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A3. Decision Traceability Log

Description

Persistent audit log of decisions and tradeoffs.

Functional Requirements

- Track:
 - Alternatives considered
 - Constraints acknowledged
 - Risks accepted or deferred
 - Approval timestamps
- Immutable once approved

Primary Use Cases

- Audits
 - Leadership transitions
 - Post-implementation reviews
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EPIC B — Facilitator Intelligence & Control Layer

B1. Facilitation Playbook Mode

Description

Embedded guidance that supports high-quality facilitation.

Functional Requirements

- Context-aware prompts by workflow stage
- Guardrails against premature solutioning
- Optional timeboxing indicators

Non-Functional Requirements

- Prompts configurable by admin
 - Can be toggled on/off
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B2. Scenario Simulation / What-If Modeling

Description

Allows facilitators to explore alternate futures.

Functional Requirements

- Clone current future state into scenarios
 - Compare:
 - Cycle time
 - Step count
 - Staffing impact
 - Risk flags
 - Only one scenario can be promoted to "approved"
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B3. Constraint Heatmap

Description

Visual overlay highlighting system constraints.

Functional Requirements

- Identify:
 - Bottlenecks
 - Rework loops
 - Approval delays
 - Policy constraints
 - Heatmap toggles by constraint type
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EPIC C — Participant Clarity & Voice

C1. Role-Based Impact View

Description

Personalized summary of how changes affect each role.

Functional Requirements

- Map workflow steps to roles
 - Highlight:
 - Tasks removed
 - Tasks added
 - Complexity changes
 - Read-only view for participants
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C2. Voice-of-User Overlay

Description

Structured feedback and engagement layer.

Functional Requirements

- Users can comment on steps
- Facilitators must disposition feedback:
 - Accepted
 - Rejected (with rationale)
- Feedback history preserved

C3. Training & SOP Impact Map

Description

Automatically identifies readiness gaps.

Functional Requirements

- Detect impacted SOPs
 - Identify training needs by role
 - Flag readiness gaps before approval
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EPIC D — Cross-Stakeholder Change Storytelling

D1. Change Storyline Timeline

Description

End-to-end narrative timeline of the optimization journey.

Functional Requirements

- Milestone-based visualization
 - Click-through detail per milestone
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D2. Optimization Confidence Score

Description

Composite readiness indicator.

Scoring Inputs

- Data completeness
- Stakeholder alignment
- Risk exposure
- Training readiness
- Leadership approval

Functional Requirements

- Score visible before approval

- Cannot approve below configurable threshold
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5. Permissions & Access Control

Role	Key Permissions
Executive	View summaries, approve/reject
Facilitator	Full edit, submit for approval
Participant	Comment, view role impact
Admin	Configure prompts, KPIs

6. Non-Functional Requirements

- Multi-tenant isolation enforced via RLS
 - Read-only executive views
 - Full audit logging
 - Export stability (PDF)
 - Performance: executive views load <2s
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7. Out of Scope (Initial Release)

- Real-time co-editing
 - Advanced Monte Carlo simulation
 - Cross-site benchmarking
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8. Success Metrics

- Reduced time-to-approval
- Increased future-state adoption rate
- Fewer post-implementation reversals
- Higher stakeholder satisfaction scores

9. Strategic Outcome

This communication layer transforms the platform into a **decision-grade system for operational change**, bridging analysis, leadership confidence, and frontline adoption.